CX Suite Help & Training Guide

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17.2 Change Log

August 28, 2017

* Getting Started > Using ForeSee CX Suite > [Filtering](#-623541622) - added Page Filtering

August 23, 2017

* Getting Started > [Leaderboard](#_Ref1536981191) - KP's edits
* Global Settings > Setup > Hierarchy > [Hierarchy Error Messages](#_Ref-276656518) - new
* Global Settings > Apps > [Text Analytics](#_Ref1169914839) - new
* Text Analytics > [About Text Analytics](#_Ref984771445) - Pavan's edits
* Text Analytics > [Analyzing Data](#_Ref-1714260268) - Pavan's edits

August 17, 2017

* Getting Started > [Leaderboard](#_Ref1536981191) - new

August 16, 2017

* Global Settings > Setup > [Hierarchy](#_Ref-349735401) - CB's edits
* Global Settings > Apps > [Case Management](#_Ref-387817167) - updated content
* Global Settings > Integrate > [Cloud Deployment](#_Ref1560907512) - updated content

August 15, 2017

* [About ForeSee Feedback Surveys](#_Ref-144884845) - total rewrite
* Feedback > Deploying a Feedback Survey > [Collection Methods](#_Ref425678766) - total rewrite
* Feedback > Deploying a Feedback Survey > [Publishing a Survey](#_Ref489420430)
* Feedback > Deploying a Feedback Survey > Manual Launch of Survey - removed (function is now in Collection Methods)
* [Topics](#_Ref-2010693117) - total rewrite
* Feedback Dashboard - removed (this was implemented when Feedback was intended as a standalone)
* Global Settings > Integrate > [Hosted Code Publishing](#_Ref1560907512) - updated links to point to new Dev Portal pages.
* [Notifications](#_Ref1723247211) - moved from Feedback section and made minor edits.

August 14, 2017

* [Creating a Feedback Survey](#_Ref-818973671) - total rewrite
* [Edit a Feedback Survey](#_Ref1196811020) (new)

August 11, 2017

* [Glossary](#_Ref-1629398316) - added Taxonomy and Site Key
* [About Text Analytics](#_Ref984771445) - total rewrite
* [Analyzing Data](#_Ref-1714260268) - total rewrite

August 09, 2017

* Surveys > CX Measurement > CX Measurement Touchpoints > [Available Touchpoint Models](#_Ref1923424267) > Competitor Panel definition

August 08, 2017

* What’s New – both topics ([Release Notes](#_Ref565651118) and [Preferred ForeSee Maintenance Schedule](#_Ref-1325217025))
* Surveys > [About Surveys](#_Ref710342630)

What's New

|  |
| --- |
| Release Notes |

[CX Suite 17.2 Release Notes - August 26, 2017](C:\\Users\\kevin.beauman\\Documents\\Content\\Resources\\PDFs\\CXS17_2ReleaseNotes.pdf" \o "[%=Tooltips.Tooltip Doc%][%=Tooltips.Tooltip Topic%])

Introducing ForeSee® CX Suite

[Fall 2016 Release Notes - November 10, 2016](file:///C:\Users\kevin.beauman\Documents\Content\Resources\PDFs\Fall16ClientFacing.pdf)

Prior Releases

* [Winter 2017 Release Notes - February 9, 2017](file:///C:\Users\kevin.beauman\Documents\Content\Resources\PDFs\Winter17ClientFacing.pdf)
* [Fall Minor 2016 Release Notes - December 15, 2016](file:///C:\Users\kevin.beauman\Documents\Content\Resources\PDFs\Fall16MinorClientFacing.pdf)
* [Spring 2016 Release Notes - June 6, 2016](file:///C:\Users\kevin.beauman\Documents\Content\Resources\PDFs\Spring16ClientFacing.pdf)
* [Winter 2016 Release Notes - February 3, 2016](file:///C:\Users\kevin.beauman\Documents\Content\Resources\PDFs\Winter16ClientFacing.pdf)

Preferred ForeSee® Maintenance Schedule

ForeSee maintenance windows are provided to help our clients for planning purposes and are subject to change at ForeSee’s sole discretion. There may be times when maintenance is scheduled outside of these windows in order to provide the best service to our clients.

Scheduled maintenance dates and times are communicated two weeks prior to the date through an in-application pop-up notification when you login to a ForeSee application. Please note: The notification period may be less than two weeks if an emergency release is required.

There are two types of maintenance at ForeSee: [System Maintenance](#-824362696) and [Release Maintenance](#-993218080).

System Maintenance

The purpose of System Maintenance is for sustaining the security, availability, and performance of the technical infrastructure. System Maintenance usually takes place on the second Saturday of each quarter. This avoids disruptions of the system during the regular work week, along with the end-of-month report preparation, which is standard in our industry.

Release Maintenance

Release Maintenance is for upgrading ForeSee products to deliver enhanced features and functionality. Release Maintenance has three categories: [Major Releases](#-973226122), [Patch Releases](#2022938589), and Emergency Releases.

Major Releases

New functionality and features for each product are rolled out three times each year:

* Around the first quarter of the calendar year.
* Around the second quarter of the calendar year.
* Around the beginning of the fourth quarter of the calendar year to avoid the holidays.

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| Note: These target release dates are subject to change. |

Scheduled maintenance dates and times are communicated two weeks prior through an email notification1 as well as an in-application pop-up notification when you login to a ForeSee application. The [Release Notes](#_Ref565651118) document, describing new features and functionality, is also posted in the [What's New](#_Ref2016949999) section of the CX Help & Training Guide.

Patch Releases and Daily Releases

These releases are typically used to deliver scheduled and ad-hoc, or as-needed, fixes. Patch and Daily Releases are usually seamless to clients. Whenever possible, these releases are deployed during off-peak hours and without too much downtime. Patch Releases are scheduled weekly and are usually deployed as needed each Thursday. Daily Releases are conducted on an as-needed basis and can occur any day of the week. The notification period may be less than two weeks if an emergency release is required.

1Email notifications are sent to ForeSee System Administrators (identified as users with Admin permissions) for your organization.

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| Getting Started |

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| Using ForeSee® CX Suite  Video |

Top Navigation Bar

The top navigation bar is the primary means of displaying the various CX Suite locations. The following is a high-level guide on what locations are available:

* Dashboards: This tab is where you can view dashboards like [ForeSee® CX 360](#_Ref2001992804).
* Surveys: This tab is where you can manage all your surveys in one place, such as [CX Measurement](#_Ref1852079564) model surveys and [Feedback](#_Ref347133383) opt-in surveys, as well as set-up [Replay](#_Ref-1812811023) to be integrated into the surveys.
* Cases: This tab is where you can manage all your customer cases related to Store and Contact Center measurements.
* Text Analytics: This tab is where you can view sentiment and keywords related to an individual [CX Measurement](#_Ref-1809513191).
* Notifications: This tab is where you can manage your personal alerts for [Feedback](#_Ref347133383).

Based on your user permissions, you may not have access to all of these tab.

In the upper right corner of the page, click the Help icon (?) to display this Help feature in a separate browser window. Click on the client's name and your initials to display the User menu with the following options:

* A list of clients you have access to.
* [Global Settings](#_Ref-1150906778)
* Switch to Advanced Analytics Portal or Executive Portal.
* Log Out

Again, these options are based on your user permissions.

Filtering

You can limit, or filter, the data shown by applying either a date range, survey filter, or hierarchy filter in order to achieve precise segment analysis. The filters you have in Analytics Portal are also available in CX Suite. In addition, you may build filters in CX Suite, as well as delete or copy over existing filters. To apply these filters:

* Date Picker - Click on the date range to display the Date Picker. The Date Picker offers the following options for limiting data to a specific range of dates:
  + A list of preset date ranges along the left side which you can select to implement. When you click on a range the Date Picker closes and the screen refreshes to display data within the selected dates.
  + Start Date and End Date text fields where you can type in the desired dates. When you enter the start and end dates the screen refreshes to display data within those dates.
  + A calendar displaying the current and previous month and the current date range highlighted. Click the start and end dates to set the range. Use the single arrows (< and >) to scroll one month at a time. Use the double arrows (<< and >>) to scroll one year at a time. When you select the start and end dates the screen refreshes to display data within those dates and the Start Date and End Date fields are updated.

Click Apply Date Range to close. The page refreshes to display data from the selected date range.

* Survey Filter - Click Add a Filter to display a list of preset filters or switch to your saved filters. These filters allow you to select specific questions and answer options of the current survey, which is displayed to the left of the Date Picker. Each selected filter displays below the secondary bar. You can apply multiple filters as desired and save the combination of filters as a new filter.
* Page Filter - Click Add a Page Filter to display a list of options where you can build a new Page Filter or select an existing filter. To build a new filter:
  1. Select a key data point:
     + Entry Page - Create a filter based on the web page which the visitor first landed on.
     + Pages Visited - Create a filter based on the web page(s) which the visitor viewed during the session.
     + Exit Page - Create a filter based on the last web page which the visitor viewed during the session.
  2. Select an operator. The operator menu defaults to URL Contains. Click to display a list of operators and select the desired option.
  3. In the text box below the operator menu, enter the filter criteria.
  4. Click the Add Criteria icon () to increase the granularity of the filter.



* 1. Click Apply to save the filter and view filtered results.
* Hierarchy Filter - The Selected Locations displays in the toolbar next to the Date Picker and offers the following options:
  + Search - Type in a hierarchy level. As you type, a list of hierarchy levels matching your entry displays.
  + Locations - A tree view of locations which may be deselected to omit them from the display. When you deselect a parent location, the child locations are also deselected. If you select a child location, only data from that location, and its child locations, display. For Case Management, only a single child location can be selected.

This filter only displays three levels for simplicity. When you drill down to a lower level, a Return button () displays for you to move back up one level.



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| Note: These filters are available on select pages of CX Suite on the ribbon below the Top Navigation Bar. |

Collecting Voice of Customer Data

Surveys Overview

ForeSee is known for our patented methodology of CX Measurement, which is a structured model based survey that delivers key insights and impacts tied to customer satisfaction. Additionally, clients have the flexibility to deploy an entirely custom survey using [Feedback’s](#_Ref347133383) opt-in survey. The following table summarizes the differences between these two survey types:

| Survey Type | Description | Deployment Options |
| --- | --- | --- |
| CX Measurement | Model based survey that has structured questions and allows for additional custom questions. | Randomly triggered on site URL in email / store receipt. |
| Feedback | Star rating, related topic questions, and other custom questions. | Badge or custom link displayed on site. |

CX 360 Dashboard

The ForeSee® CX 360 Dashboard displays for CX Measurement clients logging into CX Suite. This multi-channel view is designed to give business leaders a snapshot of priorities and performance across their business. The dashboard consists of two cards:

* The Recommended Priorities card identifies the priority across all CX Measure surveys to highlight what part of your business needs immediate attention.
* The CX Journey card displays the customer journey view, which is an ordered sequence across your measures, and compares each measure’s performance to industry benchmarks and ForeSee® Top Performers.

The ForeSee® CX 360 Dashboard can be exported into a slide show presentation format for ease and readiness in socializing data throughout your organization.

Recommended Priorities

The Recommended Priorities by CX Measure card is a result of applying the Priority Ratio across all CX Measure surveys so you can quickly identify which part of your business needs more or less of your attention. The Recommended Priorities by CX Measure card includes all of your active measures that have Satisfaction, Likelihood to Recommend in the model, and Impacts calculated. The Priority Ratio is calculated by taking the monthly stored impacts that Customer Satisfaction score (CSAT) has on the Likelihood to Recommend divided into the CSAT, and multiplied by 100. This product is then rounded to the tenth decimal point and then sorted in descending order. You see your most important priority first and your least important priority last.

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| Example:   * Likelihood to Recommend = 4.5 * CSAT = 70   Formula: (4.5/70)\*100 = 6.428571428571429. The Priority Ratio is 6.4. |

To view details about each measure:

* Click the More Information icon (...) to display details without leaving the dashboard, such as the measure’s Impact Date Range, N Count, CSAT Score, Rank Ratio, and Measure Activation Date.
* Click the Analyze Survey link to display the [Measures Dashboard](#_Ref762167178) for analysis of the specific survey.

The Recommended Priorities by CX Measure card only shows the ranking of active measures with calculated impacts. However, you can also keep track of active measures still in the process of collecting enough n count to calculate impacts, which is 300. There are two messages within the card to aid in this:

* The number of measure included and the total measures available are displayed along the top of the card.
* A reminder at the end of the carousel to keep track of the progress. Click the See Progress link or the Settings icon () to display the Settings dialog containing which measures are not included and the status of the measure in reaching the minimum n count. The Settings dialog also offers the configuration options to hide or show each measure in the card.



CX Journey

The CX Journey card displays the customer journey view in an ordered sequence across your measures. This card compares each measure's performance to industry Benchmark Average and the ForeSee® Top Performers. Measures display in an interactive bar chart:

* Hover over a score to view details, such as the CSAT, N Count, and date range.
* Click on a specific measure in the bar chart to display the [Measure Dashboard](#_Ref762167178) and easily drill in to analyze the survey in more detail.

To customize this view:

* For measures of less interest, you can control which measures display in the CX Journey card. Click the Settings icon () and clicking the Hide/Show toggle.



* The ForeSee® Website Index Benchmark Category displays by default, but other categories are available. Click the Settings icon () and select the desired Benchmark Category to display per measure in the CX Journey card.



Leaderboard

The ForeSee® CX Suite Leaderboard dashboard provides ranking and performance data for each hierarchy touchpoint, along with individual drill-in functionality. Each touchpoint is displayed with the top five and bottom five performers. Additionally, your summary view can be displayed at any level, as well as NPS or CX Score ranking options. The drill-in view includes flexible segmentation controls such as date range, survey components, hierarchy level, measure status filtering. Lastly, you can save work time by customizing your drill-in view and saving the view for future use. You can also tag your saved view as your default drill-in view.

The Leaderboard dashboard consists of the following features:

* Date Range Filter - Click the date range, which defaults to Month-to-date, and select the desired date range. You can also change the calendar type to any option installed for your organization, e.g., fiscal or Gregorian.
* Rank Menu - Click the Rank by feature to select either CX Score or NPS.
* Status Filter - Click to clear or select Active and Inactive measures.
* Measures - Each measure is displayed on a card with drill-down functionality and lists the top and bottom five performers with the following data:
  + Rank - Where each performer falls in comparison to its peers.
  + Level - The hierarchy level of the performer. You can change the displayed level from the menu in the upper-right of the card.
  + - n Count, i.e., the total number of respondents for the selected date range.



* + Score - The CX or NPS score for the performer. You can change the displayed score from the Rank by menu at the top of the page.
  + Change - The variation, or trend of the Score during the selected date range compared to the mirrored timeframe.
  + See Full Leaderboard - Display all performers for the measure in a customizable dashboard.

Click a performer to drill-in to the details page.

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| Frequently Asked Questions |

* [Feedback Deployment](#-1801118195)
  + [Survey](#-212734459)
  + [Survey Configuration](#-530704285)
* [New Survey Experience](#690174619)
* [Roles and Permissions](#1872823688)

Feedback Deployment - Web Link

**Who is responsible for sending the email with a URL,** ForeSee **or the client?**

The client decides what to do with the URL, whether to put it in an email, on their web site, or in a text message.

**Can CPPs be added to a web link?**

This feature is currently in development and is tentatively planned to be included in the 2017 Spring Release.

**Can a JavaScript link still be created?**

Yes, the release of the Web Link feature does not impact the use of a JavaScript.

**How many Feedback deployment options are there?**

You now have three options for deployment: the new Web Link, JavaScript, and popup/badge.

**If I make changes to the survey project, will the Web Link still work?**

Yes, as long as the project is active, the Web Link invokes the current version of the survey regardless of when the link was distributed.

**Is Web Link included in the project?**

Yes, the Web Link is available on the [Publishing](#_Ref489420430) page for both Staging and Production environments.

**Does Web Link require a code package?**

ForeSee® Cloud Deployment is required for Web Link and is automatically active.

**Can the code snippet (on the Publishing page) be added to a stand-alone web page? For example, a Call Center wants to deploy their own Feedback survey using Web Link and launch the survey from their Q&A web page that is not connected to the corporate site.**

As long as the code snippet is correctly added to the header of the page and the respondent is using a supported browser, the survey will show as expected.

**Can a single** Feedback **project be deployed with multiple methods, e.g., badge and URL?**

Yes, you can use either method or both. However, only one Web Link is available for each project.

**In the Project Center, is there going to be a visual way to see which projects are using which deployment methods?**

Currently, no. However, this feature is under consideration for a future release.

Survey

**Is the Star question still required?**

Yes.

Survey Configuration

**Is pixel width being used to determine whether a tablet or desktop device is being used?**

No. ForeSee uses a third-party service with a more sophisticated application to determine the type of device being used.

**Is having no text on the badge new?**

Yes, as well as a different shape.

**Is the badge color customizable to a hexadecimal value?**

Yes. See [Configuring a Survey](#_Ref425678766) for more information.

**The Size controller for the badge is a slider. Is that continuous?**

No. Currently, there are three options: small, medium, and large.

**If you don't show any topics, does the Star question still display?**

Yes, there is no setting for hiding the Star question.

**If you comprehensively white-list all topics, will the Star question still display?**

Yes.

**What is the character limit of the text boxes?**

The Short Text box has a limit of 100 characters. The Comment text box has a limit of 1000 characters.

**Adding a topic is now a link at the bottom of the survey?**

Yes, this new location is more of an in-line style for adding topics.

New Survey Experience

**How is the logical grouping of questions determined?**

Element Questions are grouped one per page. Custom Questions and non-Element Questions are also grouped one per page. For clients with lots of custom questions we are looking at putting them all on one page. Even though there may be a lot of questions we have some nice automation which automatically advances the pages as the survey taker answers the questions.

**Does ForeSee capture partial completes?**

Only if the respondent completes all Model Questions can a score be calculated.

**Are we exposing the partial completes into the portal?**

Yes.

**Does ForeSee track drop-off rates, and (if so) on what pages?**

This feature is currently being developed and scheduled for an upcoming release.

**Is there a progress bar?**

Yes, at the top of the survey.

**Is there a concern that the progress bar may be slow, such as when there are 40 questions per page?**

This is currently being tested by a focus group.

**How does the auto-page advance work?**

When all the questions are completed, the survey advances. If the respondent wants to skip an optional question, they must click/touch the forward button. This is like a rolling set of questions and not so much pages.

**Currently, ForeSee has a lot of skip-logic grouping. Is that considered a grouping on one page or separate pages?**

Separate pages.

**If Custom Questions (CQs) are required, do they need to be completed in order to get a partial complete?**

No, only the model questions are needed. CQs, required or not, do not need to be answered for a partial complete. ForeSee is considering adding a CCP to identify that the response is a partial complete in order to segment that response differently.

Roles and Permissions

**Can you edit user roles and permissions?**

This feature is currently in development and is scheduled to be released soon.

**What is the default on permissions?**

Feedback permissions currently do not have a default setting. Permissions are set up by the Delivery Operations Team.

**Can you set up specific Feedback access for a role, like certain pages users can deploy on or certain projects?**

Currently, permissions are at the project level. You cannot restrict to deploy only on certain pages of a website.

Survey

About Surveys

The Surveys page offers the following views:

* All Surveys - A comprehensive display of your CX Survey measures and Feedback projects grouped accordingly.
* My Favorites - Survey projects you select are listed on this view for quick access.
* CX Surveys - All of your measures (active and inactive).
* Feedback Surveys - All of your Feedback projects.

Filtering

The top of the page offers the following filtering options:

* Search - Type in the name or key word of a desired project to display a list of projects matching your criteria. The system responds as you type.
* Sort - A menu of sort options to organize the displayed list. Defaults to Name: A-Z.
* Date Range - A menu of time spans to limit the displayed list. Defaults to Last 30 Days.
* Status - Click to select projects of a desired Status to be displayed and clear to hide.
  + Active - The survey is currently available in the production environment.
  + Draft - The survey has never been active in the production environment.
  + Inactive - The survey was active in the production environment at one time, but currently is not.

My Favorites

Click to select the star icon () of a desired survey project to add the project to the My Favorites view. This allows you quick access to the projects currently of interest. Click to clear the star icon () to remove the project from the view. The project is still accessible from the other views.



Click the name of a measure or project to view the [Analyze Survey](#1361402717) page. Each measure or project offers the following metadata and features:

CX Surveys

* Channel - The measure categorization (or attribute) which indicates how the respondent connected with your organization.
* Status - Indicates the mode of the project, whether the project has been published, or active and available to potential respondents.
* Responses - The number of surveys submitted within the selected date range, which is included with the label in parentheses.
* Sat Score - The overall Satisfaction Score for the selected date range, which is included with the label in parentheses.

Feedback

* Add Feedback - Click to [create a new Feedback project](#_Ref-818973671).
* Author - The user name of the last person to edit the project.
* Status - Indicates the mode of the project, whether the project has been published, or active and available to potential respondents.
* Responses - The number of surveys submitted within the selected date range, which is included with the label in parentheses.
* Avg Rating - The average Star Rating of all surveys submitted during the select date range, which is included with the label in parentheses.
* - Click to delete the project.



* - Click to make a copy of the project.



* - Click to edit the project.



* - Click to preview the survey. The survey displays as an overlay in Desktop (), Tablet (), or Mobile () view.



CX Measurement

Measures Dashboard

This dashboard is designed for detailed analysis of scores associated to a specific measure. You can access the Measure Dashboard by clicking on the desired measure on the [CX 360 Dashboard](#_Ref2001992804), or by clicking Surveys in the [Top Navigation Bar](#_Ref1674679759) and selecting the measure from the menu. You can also [Filter Data](#-623541622) and download a PowerPoint slideshow of the displayed data with each card in a separate slide.

The dashboard is comprised of the following tabs:

Analyze Survey

This tab displays customized widgets, or cards, which are designed to identify areas of success and concern. Click the Settings icon () of each card to control how data is presented. The following cards are presented:



* Gauge - The inside part of the graphic represents the selected measure score, which is also displayed below the graphic. The outside represents the selected benchmark score. The number above the score is a delta representing a comparison to the score for the previous date range. For example: if your date range is set to Last Quarter, this number represents how your last quarter score compares to the previous quarter. You can click on the number to toggle between a numeric and percentage display.
* Trend - A bar chart of the measure score for each year with the selected benchmark and ForeSee® Top Performers.
* Score Summary - A color coded bar chart of each measure score and impacts. Click a score to display details.
* Trended Priority Map - A graphical representation of each measure in four quadrants based on Score and Impact on Satisfaction. Impacts are graphed on the x-axis and element scores are graphed on the y-axis. The purpose of this card is to illustrate where improvements need to be made (displayed in the lower quadrants) and which area is most likely to give the highest return on investment (displayed in the right quadrants). The size of the circle is proportioned to the Impact and top priority elements reside in the lower right quadrant.
* Comments - A list of open end responses with the date of submission and the Satisfaction score given by the respondent.

View Survey

This tab lists all Model and Custom Questions in an expandable list to view each answer choice and the Satisfaction score associated with each segment, along with the n count. Click Satisfaction to display Distribution Percentage. Click a filter check box to view responses for only those respondents.

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| Example: For the question "How frequently do you visit this site?" you click the answer choice of "Today was my first time", you see only data from the first-time visitors. |

Click the Settings icon () in the title bar of each group to control which questions are displayed.



See Respondents

The default view of the See Respondents page contains the following columns:

* # - A reference number indicating where the respondent falls in respect to the Default View sort order. For example, if the Default View is sorted by descending order of the Date, #1 is the most recent response and #37 has that many responses submitted more recently.
* Date - A timestamp of when the survey was submitted. The data is sorted by this column to show the most recent response.
* Replay - The Replay icon () displays when a recording is available for this respondent.



* Satisfaction - The overall Satisfaction Score for the survey.

Customizing Views

You can sort the data in ascending or descending order by the Date and Satisfaction columns by clicking the sort menu icon () and selecting the desired option. This menu also allows you to remove columns from view. Click the menu icon and select Remove Column to hide the column from the See Respondents page.



Click Customize Columns to view and select the data you wish to view and click Apply. The column is added on the right. You can drag and drop columns to arrange them as desired. You may also drag the edge of a column to adjust the width.

To save a custom view:

1. Click Saved Views and then click New Saved View. A dialog displays for you to type in a name for the view and you may also select Make This My Default View.
2. Click Save View. The dialog closes and your new view is now listed on the Saved Views menu, where you can click the name to apply the view, as well as edit or delete the view.

Respondent Details

Click a respondent to display the [Respondent Detail](#_Ref1604052860) page where you can view User Details, question responses, and (for Replay clients) the [Replay](#_Ref-1812811023) recording of the session. Use the left navigation menu to move up or down on the page to a specific section.

CX Measurement Deployment Options

Email Deployment

This is a method of survey deployment that allows an invitation to be emailed to a target audience with a link to ForeSee hosted, web-based survey.

How Does It Work?

* Email invitation is sent to target audience.
* Either ForeSee or a Client can send the email invitation.
* Client will identify eligible email addresses - ForeSee does NOT offer list management or sample management services.

What Touchpoint Measures Use It?

Here are a few touchpoints where this deployment may be common:

* Contact Center
* Fulfillment
* Loyalty Program
* Employee Satisfaction
* Customer Relationship Measure
* Digital Contribution
* Mobile OnExit (e.g., acct management, self service, etc.)

ForeSee Sends Email Invite: Email Customization

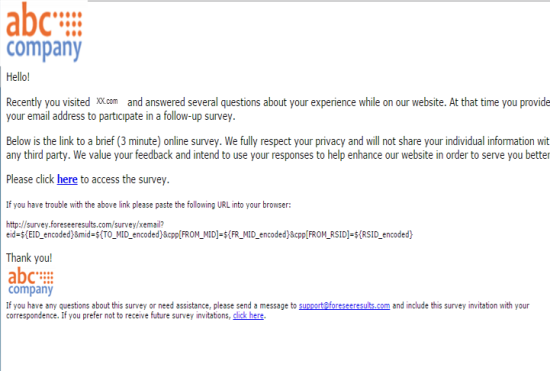
The following items within the email invitation can be configured for a specific client:

* Logo
* From Line – there are three options:
  + Default – (display) ForeSee Results Email Notifier (address) [mailto: email\_notifier@foreseeresults.com]
  + Alias – (display) Customer can define. For example ABC Company Customer Service (address) [mailto: email\_notifier@foreseeresults.com]
  + Their own - (display) Customer can define. For example ABC Company Customer Service (address) [mailto: marriott@marriott.com]
* To – this will go to the email addresses provided
* Subject Line
* Greeting – there are two options:
  + Generic – for example ‘Dear valued customer’
  + Personalized – Dear Mary Smith. Note: the name would need to be provided in the email file. If a name is not available for every record, then a generic greeting would also be needed.
* Email Content
* Signature Line

The following items within the reminder emails are also configurable:

* Subject Line
* Email Content

ForeSee Sent Email Example



ForeSee Sends Email Invite: Fielding Guidelines

* Time between email collection and invitation delivery is configurable:
  + Purchase - Typically, email invitation goes out immediately.
  + Digital Contribution - Typically, email invitation goes out seven days after the visit (depends on the length of the shopping funnel - i.e., we want to allow the respondent enough time to conduct follow-up activities. Car Shopping = longer funnel, Electronics = shorter funnel).
  + All Other Measures = Timeline to be discussed during implementation. Dependent on who is sending and how frequently client can accommodate. Ideally, we would send the invitation as close to the interaction being evaluated as possible.
* Number of reminder emails
  + Number of reminders is typically two, sent at three and seven days after the original invitation.
* The standard survey expiration time frame is seven days after the final reminder is sent out.

ForeSee Sends Email Invite: ForeSee Capabilities

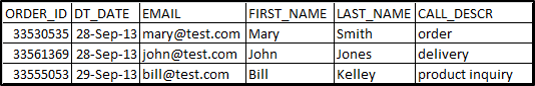
* Deduping: ForeSee can accommodate deduplicating the email list against other email lists that the client has sent previously and merging lists to a single email list. Also to manage repeat days process (e.g., don’t invite within X number of days).
* Do Not Contact: ForeSee maintains a client-specific list of email recipients that have requested not to be contacted by ForeSee again for this client’s surveys.
* Opt-Out Process: ForeSee is not able to manage an opt-out process for the client or within the client’s CRM system. An opt-out link is typically included at the bottom of the ForeSee sponsored email invitation.
* Survey Link Expiration: See [Fielding Guidelines](#-1299489863) section.
* Response Activity Tracking: ForeSee captures the following parameters and can create a waterfall report on them if requested. The report can be set up to run at a frequency of the client’s choice, though weekly is default.
  + Number of rows in the email address file
  + Number of emails successfully sent out
  + Number of emails failed to send
  + Number of email invitations opened
  + Number of surveys displayed (e.g., the URL within the email was clicked on)
  + Number of surveys submitted
* Random Selection Within a Single List: We can programmatically select every Nth row in a file to allow for random sampling across that file. We would provide guidance on what the "Nth" should be based on the volume of available emails within a file and the desired N Count.

ForeSee Sends Email Invite: Requirements For Passing Data To ForeSee

* The file must have column headers and cannot contain spaces.
  + Order\_ID instead of Order ID
* Delimited files (CSV, TSV, Pipe, or any other delimited format) with associated header record.
* Any dates supplied in MM/DD/YYY or M/D/YYY H:MM format.
* One row per respondent.
* ForeSee respondent ID required as a data point in each row.
* ForeSee will establish an ID, Password, and directories to the SFTP host. A client-supplied SFTP can be used as well.
* ForeSee also has the capability to provide Public Key Authentication.
* Encryption with Open PGP and GnuPG (GPG) is supported provided the ForeSee encryption key is used.
* Column order must not change.
* Additional columns added after implementation may be appended as the last column.

ForeSee Sends Email Invite: General Information

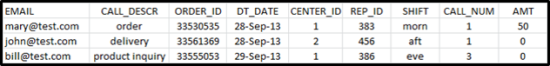
* Client will need to send a sample file of email addresses (sample below).
  + They can send the file as either Comma Separated Values (CSV) or Tab Delimited (.txt).
  + The sample file and future files must be sent to a ForeSee SFTP (Secure File Transfer Protocol). ForeSee will set up a SFTP site specific to the client.
  + The file can include additional variables that can be appended to the survey URL to pass as CPPs.



* ForeSee emails have the capability to accommodate dynamic text.
  + Please be sure to highlight the areas in the email text that are dynamically populated.
  + Each item that presents itself dynamically must be in a separate column in the email file that is sent to ForeSee.
  + The client must communicate which columns in the file fill in the various areas of the email text.
  + If the survey is translated into another language, then the dynamic text needs to be translated (if applicable) before sending the email file to ForeSee.

Client Sends Email Invite: General Information

* If you answer yes to any of the following questions, ForeSee must load the email file prior to the client sending the email:
  + Do you want the link to expire?
  + Do you care if the link can be submitted multiple times?
  + Do you have a lot of parameters (EPPs) you want to append?
* A sample file of email addresses and EPPs (sample below) which should be sent to ForeSee:
  + The file can be saved as either Comma Separated Values (CSV) or Tab Delimited (.txt).
  + The sample file and future files must be sent to a ForeSee SFTP (Secure File Transfer Protocol).



* ForeSee will need to be provided with the name(s) and contact information of those who will be sending the emails on the client side, so a notification can be sent when the files are loaded and the emails are safe to send out.
* The survey link will not expire if the client sends the email.
* Survey submission is unlimited, we cannot stop a respondent from submitting multiple surveys from the same link.
* Additional CPPs beyond the default captured CPPs are limited by the URL API length.

Deployment Statistics

The metrics provided below should be used as a guide - actual response and acceptance rates can vary significantly depending on the type of audience and their propensity to participate in surveys.

* Email Acceptance rates - 5-15% (depends on the type of audience, quality of email address, and how soon email is sent after the interaction)
* Email Completion Rates - 75-95%

IVR/IVA

An IVR/IVA survey is a pre-recorded automated survey in which the customer responds to questions either by voice (IVA) or by typing numerical responses using the telephone keypad (IVR).

* IVR = Interactive Voice Response
* IVA = Intelligent Voice Automation

The Two Sides Of IVR/IVA

* Deployment
  + How we deploy IVR/IVA to the customer and how they are able to hear it:
    - IVR - Human recorded speech.
    - IVA - Computer recorded speech.
* Capture
  + How the respondent is able to respond:
    - IVR - Keypad capture.
    - IVA - Voice recognition capture.

Which Touchpoints Use It?

* Contact Center
  + Contact Centers use IVR to deploy surveys after the customer has finished interacting with the customer service representative.
* In-Location Experiences - Store
  + Stores use IVR to deploy surveys from POS receipts.

Types Of IVR/IVA Deployments

* Inbound - Customer calls to take the survey from a store receipt.
* Call Transfer - Customers are invited to take the survey at the start of a support call and transferred to the prerecorded survey.
* Dial-Back IVR - A list of customer phone numbers who have contacted the call center are automatically dialed and when the call is accepted the IVR survey begins.

Survey Minutes

Survey Minutes are considered to be the total time that any respondent is in the voice portion of the capture, including open-end comments. Survey Minute costs are contractually estimated and managed based on the number of respondents and the time it takes to complete the survey.

Question Changes

Question Changes - Alteration and implementation of additional questions or wording changes as required:

* Customer/Foresee to provide question script.
* Utilize existing voice talent options.
* Modifications to the survey after script approval is given and voice recording is completed requires a per question change fee.

Transcriptions

Transcriptions - Transcription of open-ended comments into text and loading into Foresee portal:

* Includes hosting of WAV file for indefinite amount of time.
* Transcription of open end comments is available roughly two days after survey completion.

IVR Alerting

A standard IVR alert configuration includes up to three alert criteria and a single distribution list for each alert criteria. If multiple parties are to receive alerts, we prefer the client provides a single Group Distribution List for each alert trigger and the client modify inclusion/exclusion within that group on the client side.

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| Note: If the client has a PSTN telephony system, then the only variable that can be passed in the alert is the Caller ANI (caller's phone number). All other information which the client wants regarding the specific caller/respondent must be matched up on their end using the Caller ANI. |

General Information

* Preferred maximum survey length be 12 questions.
* We now have the capability to include more than one open-end response into a single IVR survey.
* IVR has only one model question per element and responses are only on a 1-9 scale, 0 as Don’t Know for element questions only.

Contact Center Specific Information

* Use of this option assumes the client will manage the call prompting/invitation process within their IVR system - typically through a vector prompt or telephony switch.
* Requires that agent be able to hang up or transfer call manually.
* Customer must be able to support VDN scripting or vector routing to direct call to IVR survey application.
* Must be able to pass us agent ID through one of the following options:
  + PSTN = We can capture caller ID (or client can replace that field with Agent ID) only. If Caller ID, client must be able to match on that ID and append Agent ID as part of EXDL Integration process.
  + SIP = We can capture much more data with call transfer. This requires unique implementation and additional costs per client.
  + MPLS = We can capture much more data with call transfer. Requires unique implementation and additional costs per client. Much more expensive to implement and is not recommended.

In-Location - Store Specific Information

* Client prints both the URL and TFN on the receipt.
* Adjustments may be needed to control sample sizes/costs once live (i.e., reduction in the number of receipts including IVR options).

DEPLOYMENT STATISTICS

* IVR Acceptance rates - 20-60% (Vary significantly based on audience being targeted and length/type of call).
* IVR Completion rates - 85-95%

Panel Deployment

In the context of ForeSee, a panel is a group of people with shared/similar experiences whom are accessed through a third party panel provider and ForeSee partner. See the current partner list under [General Information](#-1402469859) for the purpose of surveying. ForeSee utilizes Panel Sample primarily for Competitive Studies or syndicated research projects (such as FXI).

How Does It Work?

Instead of deploying the survey ourselves, ForeSee works with a panel company who can leverage their relationships with the panel participants to ensure that our survey is only shown to respondents who fit into the predefined target audience group(s). We develop the survey to look and act the same way it would if we were going to be in charge of the deployment. The panel company fields the survey through any number of deployment options they have at their disposal, and as the data comes in, it is loaded into the portal the same way it would be if we had deployed the survey ourselves. Once the agreed upon number of completed surveys has been met, we turn off the collection process on our end and the panel company’s part in the study/measure is done.

What Touchpoint Measures Use It?

Here are a few touchpoints where this deployment may be common:

* Competitor Panel - Study

Products for which it is an Alternative Deployment Options:

* Loyalty
* CRM

General Information

* Our current Panel partners are:
  + Federated Sample
  + Research Now
  + GMI
* CPPs: Determine whether any additional parameters which the panel company can provide need to be passed with the respondent, for example: Age, Sex, Origin, Region, etc. There is a set that the panel company does provide at no cost. These are the only parameters that should be included unless otherwise negotiated and specified within the contract.
* Implementation Timeline: Panel Studies are subject to prioritization and timing constraints which are agreed upon prior to implementation.
* Quota Stops: ForeSee controls the quota stops for completed surveys. This is a automatic process that can be set up in the system by the production team or the analyst. It is typical to have a handful of extra completes beyond the contractually agreed upon amount.
* Click to view this web site. Typically, the analyst activates the measure for the client when the fielding has stopped. The analyst is then able to see the data in the Portal during the fielding and has access to daily completes summaries.

Panel Specific Terminology

* Quota: The number of completed responses contractually required for each brand/target audience group included in the study.
* Over Quota: The number of completed responses over the contractually required amount.
* Soft Launch: An initial test fielding of the survey by the panel company to assess response to the survey.
* Live Date: The full launch of the survey by the panel company. Follows the soft launch.
* Qualifier: Also called qualifier page, these are the questions that determine whether or not the panel participant meets the criteria specified by the client for each of the target audience groups in the study.
* Terminate: The page a potential respondent receives when they do not meet the survey eligibility criteria.

Panel Study Scoping

ForeSee will work with the client to answer the following questions:

* Which target audience groups to include in the study?
  + Typically 3-5 maximum, though just one target audience for Loyalty and CRM measures is standard.
* What is the number of completed surveys desired per target audience group?
  + Typically, 300, 500, or 700 per group.
* What is the geographic area of collection?
* What are the qualifying requirements to be met by respondents (e.g., have visited one of the brand’s websites within the past 30 days)?

Survey Statistics

There are no real survey statistics for a panel study, such as acceptance rate or response rate, that are collected since the panel is tasked with getting the survey to the correct individuals.

Point Of Sale

Point of Sale (POS) is a deployment option which uses a transaction receipt to offer the survey to the respondent.

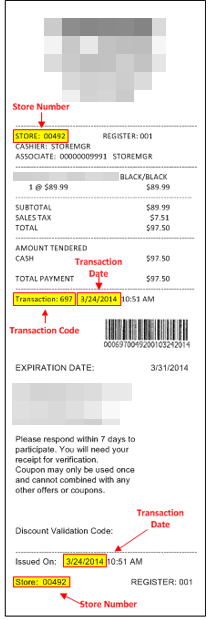
How Does It Work?

POS deployment uses either a physical receipt or an eReceipt to offer the customer the ability to take a survey. The “call to action” (i.e., Survey Invite) is presented through either a URL, IVR survey toll-free number, or both depending on the desired solution.

The receipt contains information that must be entered into the survey landing page to be validated in order to take the survey, e.g., transaction date, store number, and transaction number. Once the customer inputs the required information they are allowed to take the survey. This approach deters survey fraud and repeat entries from the same receipt.

Sample Receipt #1

In this sample receipt, the customer must input the store number, transaction number, and date into the survey landing page before having access to the survey.



Sample Receipt #2

In this sample receipt, the customer only needs to input the receipt code into the survey landing page. This receipt code incorporates all the required info (store number, transaction code, transaction date) into one string so the customer does not need to look at different locations on the receipt for each piece of information.



General Information

* The client must facilitate the process of getting the ForeSee survey information, such as the hyperlink or [IVR](#_Ref-301810272) phone number and code on the POS receipt. A vanity URL may also be used if the client wishes to provide one to ForeSee during the survey deployment process.
* If the POS allows for an eReceipt, an [Email Deployment](#_Ref-1381366219) of the survey may also be an option.
* Client can have both IVR and URL deployment option on the same receipt.
* URL survey data remains separate from IVR survey data in the Portal if multiple deployment types are used.
* We can make sure there are no duplicate submissions regardless of the number of deployment types used due to a unique receipt/transaction code.
* Respondent must enter purchase date, store number, and transaction number to participate in the survey.
* Respondents have within seven days of the purchase date to participate in the survey (day of purchase counts as day one).

Survey Statistics

* POS Receipt acceptance rates - 1-3%
* Email Acceptance rates - 5-15% (depends on the type of audience, quality of email address, and how soon email is sent after the interaction).
* Email Completion Rates - 75-95%

SDK Deployment

SDK stands for Software Development Kit, which is typically a set of software development tools that allows for the creation of applications. The Mobile SDK is primarily used to provide measurements within Mobile App Measures.

General Information

* The SDK code controls the following:
  + Sampling Parameters
  + Survey Definitions
  + Survey Invitations
  + Client Logo on Invite
  + ForeSee Logo on Invite
  + CPPs
  + Languages
* Once the code has been downloaded, any changes are the responsibility of the client, apart from the sampling percentage, which is ours.
* If a respondent receives an invite/survey and then an app update is pushed, this data is stored in the app storage so we will not invite again.
* ForeSee cannot host SDK codes. The only exception to this is Hybrid apps, though it is rare so check with Mobile SME prior to presenting this as an option.
* ForeSee® SDKs only support [iOS and Android operating systems](http://developer.foresee.com/docs-articles/supported-platforms/). ForeSee does not support PhoneGap (Cordova) style applications. Clients can instrument their PhoneGap application on the platforms we support using native SDK.
* ForeSee does not offer custom configurations for our SDKs, though the client is free to do custom configurations on their end.

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| Example: An example of this would be configuring a time variable, such as somebody must be on the app for 30 seconds before receiving an invitation. |

* App Replay is delivered within an SDK instead of a code package. It utilizes a series of screen captures (up to 80MB) to recreate the experience the user had on the app.
* In the ON\_EXIT invitation mode, the user is assumed to have completed the survey as soon as they accept the invitation since there is no way for the SDK to know if they follow the link they have been sent.

iOS Specific Information

* [ForeSee currently supports iOS 7.0 and above](http://developer.foresee.com/docs-articles/supported-platforms/" \o "[%=Tooltips.Tooltip Web Site%]).
* ForeSee has the ability to interact with a number of third-party analytics services to provide integrations and data sharing between those services and our SDK. The following services are currently supported:
  + Adobe Marketing Cloud
  + Web Trends
  + Google Universal Analytics
* By default, the SDK automatically captures and sends the following device related CPPs with the survey:
  + Model name (iPhone, iPad)
  + Brand name (Apple)
  + Browser (the version of Safari)
  + Operating System (iOS)
  + Operating System Version (7.1.2)
  + Is\_tablet (true if the device is an iPad)
  + Resolution Width (screen width in pixels)
  + Resolution Height (screen height in pixels)
  + Screen Width (screen width in mm)
  + Screen Height (screen height in mm)
  + Locale (the device’s locale)
* SDK supports three invitation modes:
  + Immediate - This is the default invitation mode. The survey is displayed immediately when the user accepts the invitation. The survey is displayed in a UIWebView by a custom UIViewController. It is automatically dismissed when the survey is completed or the user abandons the survey by pressing the Close button.
  + On-Exit - This invitation mode asks the user for an email address or a mobile number. After submitting the information to the ForeSee servers, the invitation is dismissed and the user is sent back into the app. No survey presents in this mode. Instead, after a period of time, the user is sent an email or an SMS text message with a link to the survey.
    - Client surveys must be configured on the ForeSee servers for this option to work properly. The client can enable it in their configuration file, but a survey link won’t be delivered unless properly configured remotely as well.
  + Local - In this mode, when the user accepts the survey invitation a local system notification is queued. Once the user exits the app, they see a local system notification informing them that they can take a survey. For further technical requirements surrounding iOS local invites, please click [here](http://developer.foresee.com/docs-articles/android-sdk/trigger/invite-modes/).

Android Specific Information

* [ForeSee currently supports Android 4.0 and above](http://developer.foresee.com/docs-articles/supported-platforms/" \o "[%=Tooltips.Tooltip Web Site%]).
* SDK supports three invitation modes:
  + Immediate - This is the default invitation mode. When Trigger is configured for this mode, the survey is displayed at the point where the user accepts the invitation. The survey is displayed in a WebView. It is automatically dismissed when the survey is completed or the user abandons the survey by pressing the Back button.
  + On-Exit - This invitation mode asks the user for an email address or a mobile number. After submitting the information to the ForeSee servers, the invitation is dismissed and the user is sent back into the app. No survey presents in this mode. Instead, after a period of time, the user is sent an email or an SMS text message with a link to the survey.
    - The client’s surveys must be configured on the ForeSee servers for this option to work properly. On-Exit may be enabled in the configuration file, but a survey link won’t be delivered unless properly configured remotely as well.
  + Local - In this mode, when the user accepts the survey invitation a local system notification is queued. Once the user exits the app, they see a local system notification informing them that they can take a survey. For local notifications, in addition to setting the mode in the configuration file, a layout for the notification, as well as an icon to be displayed in the notification bar, are recommended.
* ForeSee has the ability to interact with a number of third-party analytics services to provide integrations and data sharing between those services and our SDK. The following services are currently supported:
  + Adobe Marketing Cloud
  + Web Trends
  + Google Universal Analytics

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| Note: It may also be possible to add other integrations if the required data is available from within your app code. |

* By Default, the SDK automatically captures and sends the following device related CPPs with the survey:
  + Model name (e.g., GT-S7560M)
  + Brand name (e.g., Samsung)
  + Browser (e.g., Android WebKit)
  + Operating System (e.g., Android)
  + Operating System Version (Android 4.4)
  + Is\_tablet (true if the device is a tablet)
  + Resolution Width (screen width in pixels)
  + Resolution Height (screen height in pixels)
  + Screen Width (screen width in mm)
  + Screen Height (screen height in mm)

On-Exit Contact Information Handling

How long do we store email and mobile phone numbers captured through the Mobile On-Exit invite process? - There is a daily job that runs everyday to remove all contact information (email or phone number) every 24 hours. If a client has a reminder policy set up, then the contact information is saved in our system until the reminder date is met and then removed within 24 hours.

Support Guidelines

When an issue has arisen with a client's in-app implementation, the best first step is to gather information about what happened. Some good initial questions to ask are:

When did the issue start? Was there some change you made in your app code?

This will allow you to determine if the issue arose because of something the client has done, or some external issue.

Does the issue persist if you uninstall and reinstall the app?

Clients often forget that the SDK has a state. Uninstalling and reinstalling the app is a quick and easy way to see if the state is causing the confusion. If the problem is solved after this resetting of state, you should mention to the client that once one invite is shown, the repeatDays threshold must be met before a new invite is shown.

What version of our SDK are you using?

This allows us to be able to mirror the client's setup by stepping back to the version they are using.

Is there a problem with the configuration?

Ask the client to send you their configuration JSON. From this you can often tell where things might be going wrong.

What platform is this happening on? iOS, Android, or both?

This is useful for the same reason as understanding the version, but if the issue is happening on both, it's more likely to be something external to both the client's code and our SDK code since it's unlikely the same issue would crop up in two different implementations. Of course, that's not a guarantee, as we've seen with previous clients.

What notification type are you using?

On iOS, local notifications can cause confusion because the user may have previously declined local notifications and therefore the invitation does not show. Because this setting is hard to reset, this confusion can extend even after the app is uninstalled.

Are you using a cross-platform development language?

Cross platform frameworks such as Xamarin, Cordova (PhoneGap), Appcelerator, etc. can all cause problems with our SDK. Although we do not officially support these platforms, there are possible ways to implement with them and some support can be given.

Exclusions

For web based SDK, page exclusions can be based on things such as specific URLs, referring domains, browsers, cookies, etc. These are not applicable to in-app SDK. In-app SDK depends on a command to show the invitation. This command must be placed in any place the invitation is required to show.

Because of this, it is also impossible to execute global exclusions based on IP address (this is usually done when trying to exclude internal IP addresses).

Cookies

Cookies do not really exist as such in apps. Although ForeSee does store a state and keep a count of the measurement criteria, it's done with persistent storage rather than cookies.

Sampling Parameters

* Sampling percentage works in a similar way to web measures: Once the eligibility criteria has been met (launch count, significant events, etc), the user is sampled according to a percentage set on our servers. If they pass, they are shown an invitation. If they fail, they are resampled next time they open the app.

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| Note: IS sets sampling percentages for in-app measures. |

* The concept of loyalty factor as it applies to web-based trigger code (number of pages into a session) is not applicable to in-app SDK. Since a loyalty factor does not exist, there is no place in the code to set it.
* Unlike web-based trigger code, where setting sampling parameters to 0 effectively “turns off” the code, setting any criteria to 0 within the in-app SDK means that the invitation launches immediately (after 0 launches, for example). If the client wants to ignore a criteria, that line should be removed from the configuration.

Event Triggers

Our SDKs have the following built in events for triggering survey invitations:

* Number of times the app has been launched:
  + The client can select this value themselves via the configuration file included within the SDK.
* Number of days since the app was launched and installed:
  + The client can select this value themselves via the configuration file included within the SDK.
* Significant client owned events:
  + e.g., click a specific button, reach a specific page on the app, complete a purchase.
  + These events can be anything the client decides. They are incremented using a command called on the SDK.
* Lifetime Page views:
  + The number of Activity resumes (Android) or ViewController appearances (iOS) in the app.
  + After triggering this event based on the count determined by the client, the survey won’t show for another 90 days. The next time the visitor opens up the app after the 90 days are up, the counter resets.

Trigger Code Package - Use For Random Intercept Sampling

The ForeSee® Trigger Code Package is a JavaScript library that contains some JavaScript, HTML, CSS, images, and one .swf file. The purpose of this JavaScript library is to present a survey invitation to website visitors. The library also contains logic to collect CPPs.

Trigger code is applicable to:

* Desktop website measurements
* Mobile website measurements
* Tablet website measurements
* Replay

How Does It Work?

* ForeSee® Hosted Code - To implement ForeSee’s web-based measurement products, customers need only make a small change to their website template. Customers receive a small JavaScript snippet that they need to add to their global website templates so that it appears on every page of their website. The snippet causes a small JavaScript file to be downloaded from the cloud. This file manages the injection of the ForeSee script, which is used to track usage of the site and present survey invitations as needed.
* ForeSee® Client Hosted Code - Clients are provided a JavaScript library to be hosted on their web or content server. This library contains JavaScript, HTML, CSS, images, and one .swf file. The purpose of this JavaScript library is to present a survey invitation to site users based on the configured requirements. Once a site user has become eligible, based on those requirements, the code then presents the survey invitation and subsequent survey questionnaire (hosted by ForeSee) to the site user. This library may also contain logic to collect additional client specific data points that are available on the site to be passed along with the survey results through the use of Customer Passed Parameters (CPPs).

What Touchpoint Measures Use It?

Here are a few touchpoints where this deployment may be common:

* Website/Desktop Measure (any)
* Mobile Site Measure (any)

What Does The Trigger Code Control?

* Sampling Parameters (pooling rate, loyalty factors, sampling rate)
* Survey Definitions
* Survey Invitations
* Client Logo
* ForeSee Logo
* Admin Page
* Survey Tracker (child window)
* Qualifier Page
* Opt Out Page

Trigger Code Hosting Options

To support the diversity of workflows and policies that ForeSee clients may have for their website, ForeSee provides the following options for getting code implemented:

* ForeSee Hosted Code (preferred) - This is the default option and offers the most hands-off experience for the client. In this case, the client makes a small addition to their global website template to link to the hosted JavaScript file. This method allows all code modifications to be made by ForeSee, without any further changes to the client’s website. Once the client has added the code snippet to their template, they do not need to revise the template again to receive code updates from us. This is because the embed snippet references the client’s permanent home in the ForeSee cloud.
* ForeSee Hosted Code with Versioning - This is similar to the first option, but with each update to the code being given its own unique URL. This gives the client the security of knowing that changes to code hosted in the cloud cannot occur without them explicitly changing their website template. It also means that they must change their template for even the most minor update to triggering behavior. In terms of overall flexibility, this option is less optimal than the first, but still gives them some of the convenience of cloud hosting.

ForeSee® Hosted Code: Why Use It?

The default option for deploying ForeSee web products to the client’s website is to use our hosted JavaScript. We host the assets for getting ForeSee products onto the client's website and they make a one-time change to their website template. The benefits of this approach include:

* One-time code change - This greatly simplifies the process of implementing our code package on the client’s site. Once a client has our embed-snippet in the HTML template, they do not need to make further changes when they want to tweak the way products trigger or behave on their site. We can provide that service for them.
* No need to host ForeSee files - With this system, clients no longer need to host any ForeSee scripts, stylesheets, or images, making the process of implementing our code simpler.
* A reliable, enterprise-grade Content Delivery Network (CDN) - We partner with an industry-leading CDN that provides low-latency, high-reliability, geographically distributed edge servers to ensure content is delivered to the website visitors quickly.
* Asynchronous loading - Content is loaded onto the client’s site in parallel with the rest of their content, meaning that ForeSee scripts have negligible impact on page-load times in the unlikely event the content server is slow or unreachable.

Pinning & Locking

* By default, our code evaluates your current definition on each page you visit after accepting the invitation. Once you meet the loyalty factor for a definition, you would then qualify for that specific definition after accepting the invite. The last definition you qualify for before your exit condition will be the rule that's used/survey that's presented.
* A client may want us to pin a checkout and/or purchase definition over a more general browse definition. Checkout and purchase receive less traffic than the overall site, so we want to make sure that anyone who accepted the invitation via the browser definition would receive the checkout or purchase survey if they enter the checkout flow or complete a purchase. The "pin" parameter can accomplish this.
* You could still move into a higher priority definition. The code reads the definition from the top down. The higher up a definition is in order, the more priority it has. Once you are pinned to a definition, you can move up to a higher priority definition, but you can't move down.
* Using the "lock" parameter in a survey definition allows the code to make sure the definition used to present your survey is the definition that invited you. If the definition that triggers your invitation is using the "lock" parameter set to "1", you will not be able to move up or down into another definition. The definition that triggered the invitation will remain until you trigger an exit condition.

Event Triggers

* Clients can set specific invitation triggers within their trigger code. An event trigger means setting the survey invite parameters to something other than the loyalty and sampling parameters. For example, a client could want an invitation to show whenever a visitor clicks on a certain button.
* Each clickable event can have a unique sampling percentage attached to it.
* There is no loyalty factor associated with clickable events. Visitors either meet the sampling parameters and receive an invitation or engage in the clickable event, whichever comes first.
* Clickable events automatically open tracker windows, not a survey invitation.

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| Note: It should be noted that depending on which browser the visitor is using, the tracker window may show up in front of the browser window. |

Exclusions

* The ForeSee code should be placed globally across all pages. However, it be desired for an invitation to not display based on certain criteria. To suppress the invitation, page exclusions can be utilized. Page exclusions are formatted in a comma separated list based on specific URLs, referring domains, user agents, browsers, cookies, and/or JS variables.
* Global Excludes are used in situations when the ForeSee code should not execute on the site. These are often utilized when clients are trying to exclude internal IP addresses or have a special user agent assigned to an internal bot checking the site. The Global Excludes can be based on URLs, variables, cookies, or user agents.
* Excluded pages still count towards the Loyalty Factor requirement (minimum page views).
* Code should not be intentionally left off a page in an attempt to exclude it. Leaving code off a page may result in an early exit condition causing the survey questionnaire to present for users who had already accepted an invitation.
* Regular expressions can be used to exclude both URLs and IPs instead of excluding them individually.
* We do not collect or capture IP address, so if the client wants to exclude by IP address, they need to set up a JS variable so they can pass the IP address.

Cookies

* The biggest difference between the way cookies work for Legacy and Hosted Code is that the session cookie for Hosted Code is both a first party and third party cookie (see [What is the difference between first and third-party cookies?](https://www.quora.com/What-is-the-difference-between-first-and-third-party-cookies) for more information). This gives the client the ability to track visitors across domains that they own without initiating an exit condition and having a survey display when they leave the first domain.
  + We would use the cross-domain feature when the site includes two separate domains, but it's part of the same experience we're trying to measure.
* Other than the information above, cookies have the same behavior and same type of data stored (CPPs) for both [Legacy](file:///C:\Users\kevin.beauman\Documents\Content\cxMeasurement\triggerCode.htm) and Hosted Code.

Sampling Parameters

* The behavior of the survey is controlled by the foresee-surveydef.js file located in the ZIP file. The two most common parameters that may need adjusting are the Loyalty Factor (LF) and the Sampling Percentage (SP). The Loyalty Factor indicates the minimum number of pages a user must visit to receive an invitation. The Sampling Percentage indicates the percentage (random chance) of users who are invited.
* The Loyalty Factor must be met for the definition first then the Sampling Percentage in order to receive an invitation.
* The operators for Loyalty Factor can include:
  + = An invitation displays only when the Loyalty Factor is exactly this number of page views.
  + >= An invitation displays when the Loyalty Factor is this many page views or greater.
  + > An invitation displays when the Loyalty Factor is greater than this many page views.
* The Loyalty Factor increments for both active and inactive tabs. For example, if a visitor has two tabs open for the same website in the same browser window, the tabs aggregate the number of page views to reach the LF. If the visitor has viewed two pages on the first tab and three pages on the second tab, they have a current pages viewed of five.
* We have the ability to “oversample” specific pages on a domain. For example, a client may want to have everybody who reaches a certain page of the site to receive an invitation (assuming they have met the
  + For each oversampling situation, a separate Loyalty Factor must be set up.Since the client hosts the code, changes to the sampling parameters can be done in two ways:We can provide guidance on where they can find the section of the code that controls the sampling parameters and they can make the changes themselves.We can send them a new set of code with the new sampling parameters and they must replace the snippet of code in their global header.
* Since we host the code, we make the changes to the sampling parameters based on the clients requirements.
* By setting the sampling percentage to zero (0), you effectively “turn off the code”. Survey invitations will not present on any page in this situation.

Pooling

* Pooling is a concept introduced with [cxReplay](file:///C:\Users\kevin.beauman\Documents\Content\cxMeasurement\replay.htm). This concept is similar to the Sampling Percentage where a random number is generated to determine who should receive an invitation. However, with pooling replay eligibility is determined on the first page. If a user is not selected on the first page they do not receive an invitation. If they are selected on the first page they are then eligible to receive the invitation if they fall within the loyalty and sampling parameters.
* Because pooling immediately excludes some of the visitors from taking a survey no matter the length of their session, we must adjust the sampling percentage up for the survey to account for the fact that fewer people are eligible to take the survey. We start by adjusting the SP in unison with the pooling number. So if the pooling SP is 20% (1/5), we multiply the current sampling rate by five. Then we adjust the SP up for the average number of pages viewed, being larger than one, to account for the increased probability users who are now not in the pool had of getting invited previously.
* The trigger code still has an option for pooling even if the client does not have cxReplay. In this situation the default pooling value is set at 100.

Repeat Days Parameters

* The repeat days parameter controls the number of days in between a visitor completing a survey, accepting an invitation, or declining an invitation and when they are eligible to be shown another invitation.
* Each of these parameters can be configured to the clients specifications, though we consider best practice to be 90 days. We suggest 120 or 60 if the client wants the number of days in between to be either larger or smaller.

[Supported Browsers](http://developer.foresee.com/docs-articles/supported-platforms/)

Touchpoints

Available Touchpoint Models

| Name | Definition | Channel | Journey Phase |
| --- | --- | --- | --- |
| Browse | Measures satisfaction with a site that offers online shopping. | Web | Consideration |
| Cart Abandon | Measures satisfaction with a site that offers online shopping, among visitors who placed items into the shopping cart but did not enter the checkout process. | Web | Purchase |
| Checkout Abandon | Measures satisfaction with a site that offers online shopping, among visitors who entered the checkout process but did not complete a purchase. | Web | Purchase |
| Purchase | Measures satisfaction with a site that offers online shopping, among visitors who completed a purchase. | Web | Purchase |
| Digital Contribution | Measures the customer experience by linking each visitor’s digital experience to their post-visit journey. | Web | Consideration |
| Shipping Returns | Measures satisfaction with a shipping return process. | Web | Purchase |
| Gift Registry | Measures satisfaction with a gift registry site/component of a site. | Web | Consideration |
| Rewards Management | Measures satisfaction with a web site or area of a web site for use by participants in a loyalty rewards program. | Web | Loyalty |
| Account Management | Measures satisfaction with a secured account management web site or area of a site, including the ability to conduct transactions and complete account tasks. | Web | Service |
| Online Support | Measures satisfaction with a web site or area of a web site designed for visitor self-service support and troubleshooting. | Web | Service |
| Community | Measures satisfaction with a web site or area of a web site for use by members of a community of participants with shared interests. | Web | Corporate |
| Informational | Measures satisfaction with a site whose purpose is to provide information about an organization, its mission, products, or services. | Web | Awareness |
| News & Content | Measures satisfaction with a web site or area of a site intended to provide news or aggregated content. | Web | Awareness |
| Job Seeker | Measures satisfaction with a career site among job seekers. | Web | Corporate |
| Job Recruiter | Measures satisfaction with a career site among recruiters / companies that post jobs. | Web | Corporate |
| Intranet | Measures satisfaction with a web site intended for use by employees within an organization. | Web | Corporate |
| Browse | Measures satisfaction with a mobile site that offers online shopping. | Mobile | Consideration |
| Cart Abandon | Measures satisfaction with a mobile site that offers online shopping, among visitors who placed items into the shopping cart but did not enter the checkout process. | Mobile | Purchase |
| Checkout Abandon | Measures satisfaction with mobile a site that offers online shopping, among visitors who entered the checkout process but did not complete a purchase. | Mobile | Purchase |
| Purchase | Measures satisfaction with a mobile site that offers online shopping, among visitors who completed a purchase. | Mobile | Purchase |
| Digital Contribution | Measures the customer experience by linking each visitor’s digital experience to their post-visit journey. | Mobile | Consideration |
| Gift Registry | Measures satisfaction with a mobile gift registry site/component of a mobile site. | Mobile | Consideration |
| Rewards Management | Measures satisfaction with a mobile site or area of a mobile site for use by participants in a loyalty rewards program. | Mobile | Loyalty |
| Account Management | Measures satisfaction with a secured account management mobile site or area of a mobile site, including the ability to conduct transactions and complete account tasks. | Mobile | Service |
| Informational | Measures satisfaction with a mobile site whose purpose is to provide information about an organization or its mission, products, or services. | Mobile | Awareness |
| News & Content | Measures satisfaction with a mobile site or area of a mobile site intended to provide news or aggregated content. | Mobile | Awareness |
| Search | Measures satisfaction with the search feature on a web site. Includes search tools (e.g. find a doctor) | Functional | Service |
| Online Process | Measures satisfaction with an online process, such as a request for quotation, cost estimator, credit application, etc. | Functional | Service |
| Online Process Abandon | Measures satisfaction with an online process, among visitors who began but did not complete a process (e.g. request for quotation, credit application, etc.) | Functional | Service |
| Promotional | Measures satisfaction with a dedicated promotional site or microsite. | Functional | Awareness |
| Home Delivery | Measures satisfaction with the experience of receiving an order. | Fulfillment | Purchase |
| In-Location Pick Up | Measures satisfaction with the in-location pickup experience. | Fulfillment | Purchase |
| Sales - Telephone | Measures satisfaction with a live agent telephone order experience. | Contact Center | Service |
| Service - Telephone | Measures satisfaction with a live agent telephone customer care experience. | Contact Center | Service |
| Sales & Service - Telephone | Measures satisfaction with a phone interaction – nonspecific to the type of call (sales or customer care). | Contact Center | Service |
| Service - Live Chat | Measures satisfaction with a live chat customer care experience. | Contact Center | Service |
| Service - Email | Measures satisfaction with email/e-service customer care experience (messages back and forth via online form). | Contact Center | Service |
| Service - IVR | Measures satisfaction with a self-service IVR experience. | Contact Center | Service |
| In-Location Purchase | Measures satisfaction with the in-location experience among purchasers only. | Store | Purchase |
| In-Location Browse | Measures satisfaction with the in-location experience among primarily non-purchasers, but can include purchasers. | Store | Consideration |
| In-Location Returns | Measures satisfaction with an in-location return or exchange process. | Store | Purchase |
| In-Location (IVR) | Measures satisfaction with an in-location experience deployed via IVR. | Store (IVR) | Service |
| Corporate Level Employee | Measures satisfaction with employer among corporate employees. | Employee | Corporate |
| Store/Agent Level Employee | Measures satisfaction with employer among store associates or agents. | Employee | Corporate |
| Email Newsletter | Measures satisfaction with an email newsletter | Email | Awareness |
| Promotional Email | Measures satisfaction with a promotional email. | Email | Awareness |
| Customer Relationship - No Panel | Measures satisfaction with the customer's overall relationship with the company. | CRM (No Panel) | Loyalty or Service |
| Customer Relationship - Panel | Measures satisfaction with the customer's overall relationship with the company, fielded via a panel. | CRM (W/Panel) | Loyalty or Service |
| Competitor - Panel | Measures satisfaction with sites of competitors for benchmarking. | Competitor (W/Panel) | Corporate |
| Loyalty - No Panel | Measures satisfaction with a loyalty rewards program among members. | Loyalty (No Panel) | Loyalty |
| Loyalty - Panel | Measures satisfaction with a loyalty rewards program among members, fielded via a panel. | Loyalty (W/Panel) | Loyalty |

Cart/Checkout Abandon

Cart/Checkout Abandon measures the satisfaction with the shopping experience among visitors who placed items in the shopping cart but did not enter the checkout process, and visitors who entered the checkout process but did not complete a purchase.

Why Use It?

Retailers lose out on billions of dollars in sales every year due to cart and checkout abandonment. With retailers already facing very small online conversion rates, it’s imperative to know exactly what issues are leading customers to not finish the purchase process. Cart/Checkout Abandon gives companies the ability to focus in on those consumers who abandoned the purchase process and determine exactly why they did not complete their purchase, giving them a significant advantage on their competitors.

Target Audience

Web/Mobile Content Managers - An issue with the website content, whether it’s images, text, audio, video, or multimedia, can be the cause of serious frustration during a website visit. Enough so that a visitor may just abandon their cart or checkout process. Content managers need to know if and which website content is hurting the bottom line.

eCommerce Managers - Ultimately, issues with eCommerce falls on the shoulders of these managers. They are responsible for the eCommerce strategy, along with the planning and approval of the website development and any website maintenance. So the longevity of their employment is contingent on quickly resolving issues that affect the bottom line.

Web Design Team - The web design team may be interested in why visitors are abandoning their cart or checkout process as there may be an issue that was caused by a design component or requires a design viewpoint to remedy.

Actionable Insights

Online retailer justified investment in online chat to curtail checkout abandon issues uncovered by ForeSee. This investment paid for itself in two months verses the targeted 12 months.

Online sporting goods retailer used our Checkout Abandon measure along with cxReplay to convince their IT department that the site errors were real and were a barrier to conversions. They addressed the technical errors and redesigned the checkout process to correct issues that were causing checkout abandonment on orders.

Deployment Options

Standard/Best Practice

* Trigger Code (Web or Mobile Site)
* SDK Code (Mobile App)
* Email/SMS Text Back (Mobile On-Exit only)

Common CPPs and CQs

Common CQs

* Which of the following sources led you to visit X today?
* What was the primary reason you abandoned your cart/checkout process?
* How frequently do you visit this site?
* Were you able to find all of the information on the product you were looking for?
* What do you plan to do next?

Common CPPs

* Any of the standard CPPs
* Dollar value in cart
* Number of items in the cart
* At what point in the checkout process they abandoned
* Loyalty Member ID

Complementary Touchpoints

Web/Mobile - Browse Measure - Providing visitors with all the information they need, when they need it and how they need it is important in finalizing their purchase decision. It’s not just issues with placing an item in the cart or with the checkout process that causes visitors to abandon before purchase. Any issue that comes up at any point in the visit may be enough to cause them to end their visit. Even if that issue happened prior to them placing the items in their cart or starting the checkout process.

Web/Mobile - Purchase - The ability to compare those that finished the purchase process against those that abandoned somewhere before completion is a useful tool to have as it adds another layer of understanding to the entire website experience.

General Information

* For either Cart Abandon or Checkout Abandon measures, we must be able to identify that something has been added to the basket/cart or that the checkout process has begun.
  + If we need to check if somebody has added something to their basket, it most likely requires the client to provide an identifier for us (JS variable or cookie).
  + If we are trying to identify the checkout process, most of the time we will use the URL pattern provided by the client.

Triggering Mechanisms Available:

* Trigger Option #1: Present the invitation to the Browse survey. Once we see someone has entered the checkout/basket, or added an item in their cart, our code uses logic to move them from a Browse to the Abandon survey.
  + We cannot use this method if True Conversion is used with the Browse survey due to the fact we have to lock the visitor into the Browse measure since True Conversion is only applicable to Browse measures.
* Trigger Option #2: Present the invitation after we see that an item is in the cart, or on the first page of the checkout flow.
* Trigger Option #3: Use a "click event" to launch our tracker window, skipping the invitation. On click of a button, like “add to cart” or “proceed to checkout”, the tracker window is set to launch x% of the time.
  + Some browsers do not allow the tracker window to focus to the background automatically. In this case, the tracker presents on top of the browsing window.

Contact Center

Contact Center is a single dedicated measurement that allows the client to capture the Voice Of Customer across the multi-channel contact center environment and multiple customer touchpoints, based on their specific measurement needs.

Contact Center Measurement is available in these Sales and Service Channels:

* Phone (Live Agent or IVR experiences)
* Email
* Live Chat

Why Use It?

A client’s contact center is often multi-channel, serves multiple purposes, and crosses multiple touchpoints (e.g., Phone, Email, Live Chat). Advancements in technology have empowered the customer — creating multiple points of entry and a multichannel management challenge. As such, it is more crucial than ever for companies to leverage contact center interactions to meet the needs of both the customers and the business.

ForeSee’s best in class, proven measurement system provides perspective and depth missing from traditional contact center measurements within both sales and service organizations, across multiple contact center touchpoints. Our customer experience analytics go beyond basic efficiency metrics by helping you understand how well a contact center handles interactions with customers and what to improve upon for future business success.

By helping clients prioritize improvement opportunities based on how much they impact future behaviors, you focus on the actions that can best increase their return on investment.

Target Audience

Customer Experience Managers/Directors

Customer experience managers are concerned with the bottom line and maximizing the customer experience across touchpoints (e.g., live agent, chat, email, IVR) by providing a high level of service. They are interested in growing the profit of the contact center by increasing transactions and upsells.

Directors of Contact Centers/Contact Center Managers

Contact center directors and managers are concerned with increasing the efficiency of the contact center, uncover training and coaching opportunities, empower agents to solve problems, increase transactions and upsells, as well as first contact resolution.

Actionable Insights

Multichannel retailer determined customer satisfaction increased when customers were allowed to suggest items, boosting average order values and increased agent confidence when upselling.

Big box retailer guided analysis to strategic decision about whether to close overseas call center location and effectively manage call center costs.

Telecoms Utilities client changed the site navigation to their website, which left users confused and unable to complete tasks. The contact center, unaware of the changes made to the website, saw an influx of calls which lead to 7x more abandoned calls than the month prior. ForeSee identified key focus areas, such as improving communication between the web and contact center teams and providing consistent messages and information between channels.

Common Models

|  |  |
| --- | --- |
| SERVICE Model |  |
| SALES Model |  |
| HYBRID Model\*\* |  |

* Email and IVR deployed surveys use the same Elements and Future Behaviors.
  + IVR only allows for one MQ per Element.
  + Every respondent is asked the same one MQ for that specific survey.

Common CQs & CPPs

Common CQs

* How would you describe the length of time you spent with the representative?
* Were you transferred to another representative at any point during your call?
* Was your issue or question resolved by the representative?

Common CPPs

* Representative ID
* Problem Resolved?
* Number of calls for this order/issue
* Call Type
* Call Time
* Wait Time

For more info on CPPs as well as a list of our default CPPs, please click [here](#_Ref-2125690993).

Deployment Options

Standard/Best Practice

* Email Invite to Web-Based Survey.
  + Foresee sends emails, or
  + Client sends emails
* Telephony Switch Invite to IVR Survey.
  + PREFERRED: Automatic transfer to IVR, or
  + OPTIONAL: Agent transfer to IVR

Deployment Intricacies

* Client's own their sample management process.
* If a client wants both Email and IVR invitation, this is counted as two separate surveys and data remains separate within the portal.

|  |
| --- |
| Example: If the client doesn’t have access to email addresses for all callers they could present the IVR survey to the rest of the callers. |

* Client owns responsibility for which version to send to which caller.

How It Works: Email Diagram



How It Works: IVR Diagram



Complementary TouchPoints

The following touchpoints, when paired with a Contact Center measure, have been shown to enhance the breadth, width, and scope of the solution ForeSee offers (not a comprehensive list):

* Fulfillment - Just measuring a Contact Center sales experience is only looking at ½ the equation. What happens after the call ends also plays a role in the likelihood of customers engaging in the future behaviors.
* Digital Contribution - Just like with digital channels, customer experience measurement should not stop once the initial experience/contact is over. A Post-Call measure can provide insights into whether the Contact Center experience is creating an expectation gap relative to other channels, if it’s driving customers to other channels, and if clients are losing high value customers to competitors.
* Employee Experience - ESat drives CSat, so in the Contact Center channel, where costs are higher and the probability of being the final customer touchpoint is increased, it is imperative to understand the motivations that increase employee engagement.
* Web/Mobile - Content, Purchase - The cost of Contact Center interactions are significantly more than digital interactions. Having a Content or Purchase measure can help determine areas of need in the digital channel that might be driving customers to the Contact Center channel.

Survey Statistics

The metrics provided below should be used as a guide - actual response and acceptance rates can vary significantly depending on the type of audience and their propensity to participate in surveys.

* IVR Acceptance rates - 20-60% (Vary significantly based on audience being targeted and length/type of call).
* IVR Completion rates - 85-95%
* Email Acceptance rates - 5-15% (depends on the type of audience, quality of email address, and how soon email is sent after the interaction).
* Email Completion Rates - 75-95%

Available Measure Types

Interaction Types - We can measure (each type is a separate model/measurement):

* Live Agent
* IVR/IVA System
* Online Chat
* Email Based Customer Service
* Text Messaging Based Customer Service
* Social Media Based Customer Service

Contact Reasons/Experiences - We can measure (each type is a separate model/measurement WITHIN the Interaction Types):

* In-Bound Sales Experience
* In-Bound Service Experience

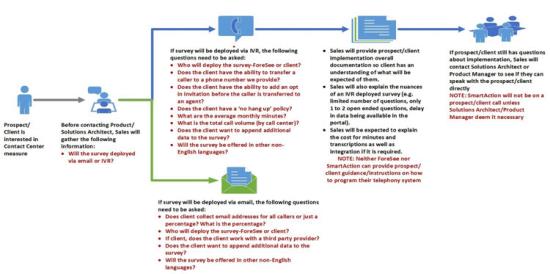
For info specific to Contact Center IVR deployments, visit our [IVR/IVA Deployment](#_Ref-301810272) topic.

For info specific to Contact Center email deployments, visit our [Email Deployment](#_Ref-1381366219) topic.

Survey Deployment Options Across The Interaction Types

|  | Email Invitation | IVR/IVA Deployment | Static URL Link |
| --- | --- | --- | --- |
| Live Agent Sales/Service | x | x |  |
| IVR/IVA Sales/Service | x | x |  |
| Online Chat Sales/Service | x |  | x |
| Email Service | x |  | x |
| Text Messaging Service | x |  | x |
| Social Media Service | x |  | x |
| Key Requirement To Accommodate | Requires client to provide emails of those interacting through this channel. | Requires ability to transfer call to IVR survey application at conclusion of call. | Requires ability to insert link at appropriate place within the interaction. |

Internal Contact Center Measure Work Flow



Customer Relationship Measurement

Customer Relationship Measurement (CRM) is a single, dedicated measurement of the target audience’s satisfaction with the overall relationship with the company cumulative of all interactions. It is not intended to measure satisfaction with a specific channel, in-channel experience, or brand affinity/awareness.

Why Use It?

A CRM measure provides executives and customer-focused leadership roles with a company-level view on their performance with customer relationships. This measure provides a customer view above and beyond any channel interactions or specific experiences. A CRM measure provides companies with an overall satisfaction score reflecting their relationship with their customer base. This measure paints a broad stroke around how the company is satisfying their customers overall and could provide direction on channel preference and usage pattern - which could help the company strategize around which channels to invest in further from a measurement perspective.

Target Audience

Customer Experience Leadership

Customer experience leadership need to be able to measure the strength of their customer relationships and identify company-level focus areas.

Company Executives

Executives want a company-level view of their performance with customer relationships, and as such, they need company level KPIs rather than the cross-channel insights that can be found with specific in-channel measurements. This allows them to align the entire organization behind key drivers of satisfaction.

Actionable Insights

A client’s CRM measure revealed that independent and franchise dealers were dissatisfied with their product experience from the client’s organization. Many dealers felt the service was not generating enough qualified leads for their business and that the online classifieds provider was not creating sufficient ROI. Furthermore, because of these sentiments, the CRM measure revealed that independent and franchise dealers were highly unlikely to purchase services in the future.

Common CQs

* What is your preferred channel for doing business with company x?
* What percentage of purchases in this category do you make with company x?
* How likely are you to switch to a different provider in this category?
* Also includes questions on demographics, psychographics, number of and types of interactions with the company.

Common CPPs

CPPs should include anything the client has stored in their CRM system pertaining to their customers and can be categorized for segmentation. For example:

* Customer Tenure
* Product Purchase/subscription history
* Annual spend
* Loyalty program participation
* Assigned Account Team

For more info on CPPs as well as a list of our default CPPs, please click [here](#_Ref-2125690993).

Model



|  |
| --- |
| Note: Most CRM opportunities require model customization - Sales Engineering and Research provides insight during the pre-sales approval process. |

Deployment Options

Standard/Best Practice

* [Email](#_Ref-1381366219)
  + ForeSee sends emails, or
  + Client sends emails

Survey Statistics

The metrics provided below should be used as a guide - actual response and acceptance rates can vary significantly depending on the type of audience and their propensity to participate in surveys.

* Email Acceptance rates - 5-15% (depends on the type of audience, quality of email address, and how soon email is sent after the interaction).
* Email Completion Rates - 75-95%

Complementary Touchpoints

The following touchpoints, when paired with a Contact Center measure, have been shown to enhance the breadth, width, and scope of the solution ForeSee offers:

* Web/Mobile - A key driver of satisfaction when the overall relationship could be the ability to self-service. Understanding where the Digital experience is impacting this process is important to improving their relationship.
* Contact Center - A key driver of satisfaction when the overall relationship could be the ability to self-service. Understanding where the customer care experience is impacting this process is important to improving their relationship.
* Store - A location experience provides a more personalized, real-life opportunity for interacting with the target audience. Identifying where this experience needs improvement is important to building the relationship.

Competitor with Panel (without Panel)

Competitor with Panel is a touchpoint that allows clients to obtain a direct comparison of performance metrics (Elements, Satisfaction and Future Behaviors) as well as KPIs (Custom Questions) of a specific experience/channel across three to five brands. This is accomplished by partnering with a panel sample provider to deploy our model-based survey to a targeted group of respondents during a specific timeframe.

Can Measure Experiences in Any of These Channels:

* Web
* Mobile
* Contact Center
* Store (sample acquisition may be difficult/costly)
* Social
* Customer Relationship Measure (sample acquisition may be difficult/costly)

Why Use It?

The competitive study offers insight on competitor strengths so the client can fortify and defend against these strengths. It also offers a glimpse into competitors’ weaknesses, allowing the client to identify areas of opportunity to advance their position in the applicable industry. The unique view of a comparative model, priority map, and segmented analyses across the competition gives our clients a competitive edge. Most importantly, it gives them the ability to move forward in an innovative way guided by the voice of customer.

Competitor with Panel can help companies gain valuable insights such as:

* What customers value between competing companies.
* The company’s position in the marketplace and how they compare with their competitors.
* Competitors’ customers’ likelihood of switching companies.
* Customer reaction to changes made within the company and competing companies.

Target Audience

Strategic Marketing and Customer Experience Leadership

Competitor with Panel provides these teams with competitive intelligence and a unique view of customer experiences with the company in contrast to chosen competitors. Marketing and Customer Experience leaders want their brands to stand out while differentiating themselves from the competition. To do so, they must gain an understanding of where their competitors are succeeding and failing when it comes to relevant customer experiences.

Actionable Insights

Telecom provider learned that customers looking for help/support are significantly less satisfied than those visiting for sales or account management related tasks, and that a satisfactory online support experience is a weakness across the competitive set. This led to follow-up Insight and Usability Reviews for telecom provider's continuous support measurement to better understand specific improvement opportunities to propel their online support experience ahead of the competition.

Telecom provider discovered that one-in-six customers who were required to login during their site visit, had to try more than once to login, an issue not as prevalent among competitors. As a result, telecom provider requested follow-up Insight and Usability Reviews for their continuous account management measurement to uncover specific improvement opportunities for the login process.

Telecom provider found that three-in-ten current customers are considering switching providers, the highest switch consideration among all providers. Further, customers who have been with the provider more than two years express the greatest consideration for switching, but almost half of would-be switchers are willing to give the provider a chance to retain them. As a result, telecom provider understands the significant need to develop customer loyalty retention strategies.

Common CQs & CPPs

Common CQs

Common Custom Questions for Competitor with Panel are relevant to whatever specific experience and/or channel being measured.

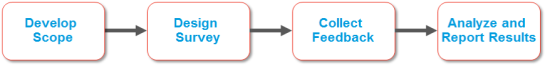
Common CPPs

Common CPPs for Competitor with Panel include any information the panel company is willing to provide (e.g., demographics).

For more info on CPPs as well as a list of our default CPPs, please click [here](#_Ref-2125690993).

Model:

This measure typically uses one of the existing standard models.



Deployment Options

Standard/Best Practice

Panel sample directed to ForeSee survey URL.

Complementary Products/Measures

The following touchpoint, when paired with a Competitor with Panel measure, has been shown to enhance the breadth, width, and scope of the solution ForeSee offers:

Web/Mobile/Contact Center - A continuous measurement of a client’s own audiences’ experiences is the most reliable methodology for improving their Voice of Customer. However, pairing the Touchpoints with Competitor with Panel provides invaluable competitive insights to help the client determine which priority improvements provide them with an advantage against their competition.

Scoping Guidelines and Information

Competitive Study scope typically includes:

* Single fielding period to obtain desired sample.
* Panel sample for two to five brands (including client).
  + Typically, acquire 300, 500, or 700 completes per brand.
* Access to results in Portal (whatever configuration of portal access they have for existing measures. If this is leading measure, includes AAP, Ad-Hoc, Comment Cluster in base price.
* One SIR, providing top-level comparisons across model and key custom questions for each brand - identifying strengths and weakness against competition. Additional SIRs can be purchased if desired.

Newsletter or Promotional Email

Newsletter or Promotional Email is a single, dedicated measurement of customer facing content delivered via an email interface.

Why Use It?

Most companies use traditional metrics like open rates, bounce backs, and click through rates to evaluate the health of their e-newsletter and account management emails. What is missing is an assessment of customer satisfaction with email elements and how these elements affect users' future behaviors.

Target Audience

* Marketing Communications Teams
* Contact Center Teams

Actionable Insights

A government client was interested in evaluating the effectiveness of the email conversion process, facilitating updates and getting constituents to key information of interest on the website. They found that health researchers and analysts to consistently be the lowest scoring subscriber group. One-third of the health researchers and analysts reported that the body of the email did not include enough information. This group also links to their expected information less often than other subscribers. ForeSee suggested that the client tailor the email message and amount of content to the recipient. Certain user groups including health researchers/analyst, consumers and nurses frequently wanted more information. Physicians/physician assistants were the group where the amount of information was most on target.

A government client found that approximately one in four subscribers were using mobile devices to read their email. Through a ForeSee® Email Measure, data showed that these mobile users were having an inferior experience compared to desktop users. Look and Feel was one of the lowest scoring elements in this subscriber segment. Subscriber feedback suggested improving the email layout to be more mobile-friendly. Once the client initiated these changes, they quickly saw satisfaction and future behaviors reach near-desktop levels

Common CQs

* Questions about the email content, such as:
  + Is there adequate info in the subject line?
  + Is there adequate info in the email body?
  + Is the email an appropriate length?
  + Is the content of the email relevant to you?
* Is the frequency of the emails appropriate?
* How long have you been a subscriber of [client’s] emails?
* How often do you click on the links within [client’s] emails?

Common CPPs

* Campaign/Email ID - to understand which email they are evaluating.
* Marketing List recipient belongs to
* Content included in email (e.g., attachments, links)
* Date Email Sent
* Date Email Opened

For more info on CPPs as well as a list of our default CPPs, please click [here](#_Ref-2125690993).

Model

|  |  |  |
| --- | --- | --- |
| **Elements**   * Look and feel * Email content * Product descriptions * Product images * Price * Merchandise * Offer Appeal | **Future Behaviors**   * Visit Website * Primary resource * Forward email * Future email behavior * Increase Business * Purchase * Purchase next time * Recommend Company * Recommend Products | These Elements and Future Behaviors are for Email Newsletter and Promotional Email measures only. Email Support measures use a variation on the Contact Center - Service model. |

Deployment Options

Standard/Best Practice

* Include survey link within email content OR,
* Separate Email Invite to Web-Based Survey:
  + Foresee sends emails, or
  + Client sends emails

Types Of Available Measures

Email Support - Measures Satisfaction with email customer care experience (messages back and forth via online form and/or email).

Email Newsletter - Measures Satisfaction with an email newsletter.

Promotional Newsletter - Measures satisfaction with a promotional email or newsletter.

Survey Statistics

Email Acceptance rates - 5-15% (depends on the type of audience, quality of email address, and how soon email is sent after the interaction)

Email Completion Rates - 75-95%

General Information

* Client must provide sample. Client owns the responsibility of identifying which email recipients should be invited to take the survey and at what cadence. ForeSee can provide guidance around this based on target audience volume, segmentation desires, and how often the client wants insights.
* Client can either include static opt-in link within the emails they want recipients to evaluate or ForeSee®/Client can send an email specifically for the purposes of a survey (email deployment option).
* The Email Support measure is typically sold as a Contact Center - Email Support measure. When customers contact a company through email support services response to that inquiry is typically handled through contact center agents.

Purchase

Purchase measures the satisfaction with the shopping and ordering experience among visitors who completed an in-channel purchase.

Available in These Channels:

* Web
* Mobile

Why Use It?

Satisfaction with the purchase experience determines whether a customer will buy from a company again. ForeSee’s Purchase measure for web or mobile can help companies discover what customers who just purchased online from them like and don't like about the purchase experience and support so that they can build a base of loyal online customers.

Target Audience

* Web/Mobile Content Managers
* eCommerce Managers
* Web Design Team

Common CQs

* Which of the following sources led you to visit X today?
* Did you have enough information to make a decision about shipping?
* Was the checkout process quick and easy?
* Were you able to find all of the information on the product you were looking for?
* Did your order qualify for a promotional offer?

Common CPPs

* Any of the standard CPPs.
* Dollar value in cart.
* Number of items in the cart.
* Use of gift card/discount code/loyalty points during purchase.
* Purchase ID/Order #.

For more info on CPPs as well as a list of our default CPPs, please click [here](#_Ref-2125690993).

Model



Deployment Options

Standard/Best Practice

* Trigger Codes (Web or Mobile Site)
* Email/SMS Text Back (Mobile On-Exit only)

Complementary Touchpoints

The following touchpoints, when paired with a Purchase measure, have been shown to enhance the breadth, width, and scope of the solution ForeSee offers:

* Fulfillment - Once a visitor makes an online purchase, the next step is to successfully deliver that product to its rightful owner. A Fulfillment measure provides insights on that fulfillment experience - defining how expectations set at the time of purchase may or may not be met.
* Checkout or Cart Abandon - Conversion is not always an indicator that the process for getting that the purchase point was efficient. A poor checkout or cart experience could be preventing a high proportion of visitors from ever completing a purchase. Measuring those experiences separately provides strategic insights into improving these processes.
* Browse Measure - Providing visitors with all the information they need, when they need it, and how they need is important in finalizing their purchase decision.

General Information

* Must have a unique URL or clickable event for the purchase to trigger the purchase survey at the right time to the right audience.

Survey Statistics

The metrics provided below should be used as a guide - actual response and acceptance rates can vary significantly depending on the type of audience and their propensity to participate in surveys.

Email Acceptance rates - 5-15% (depends on the type of audience, quality of email address, and how soon email is sent after the interaction).

Email Completion Rates - 75-95%

Employee Experience Measurement

Employee Experience is a measurement of an organization’s employees, at both corporate level or store associate/agent level.

Why Use It?

It costs a business about one-fifth of a worker’s salary to replace that worker. A business can improve their employee engagement and reduce their employee turnover by using ForeSee®’s Employee Experience Measurement to provide insights into such areas as:

* What experiences matter?
* What does our workforce value?
* What employee initiatives should we plan for next year?
* Is our current thinking on improving employee engagement on track?

Target Audience

Economic Stakeholders Targeting:

Human Resources Leaders (e.g., VP/Director HR)

Among the many responsibilities, HR teams must ensure that employee benefits, compensation, training, and work tools are meaningful and contribute to employee engagement in the workplace. The right HR programs can create a rewarding experience within a company and as a result reduce unnecessary turn-over and absenteeism.

Business Owners (Small Business Option)

For small businesses (less than 250 employees), there may not be anybody in HR who can make the decision to purchase our Employee Experience solution. In this case, the decision maker is probably the business owner. For small businesses, the ability to absorb employee issues is greatly reduced due to the decrease in scale, so the business owner needs to be aware of their employee’s engagement. The owner also has many other job duties, so having somebody to partner with to help understand the pulse of their employees is crucial as it allows the owner to focus on the day to day operations of the company.

Common CQs

* Improvement: In which of the following areas does the company need to improve? (select all that apply)
* Inclusion: Do you feel you are part of a team when you come to work?
* Leadership: Do you feel confident in the direction of the company as provided by our executive leadership?
* Tenure: How long have you been employed with this company?
* Questions about/rating benefits, performance reviews, and/or training.

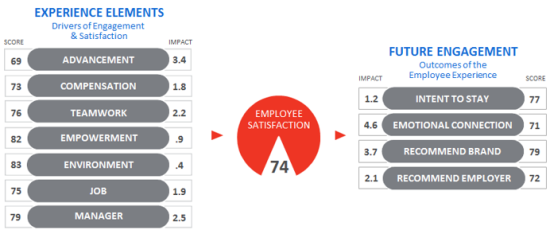
Common CPPs

**CPPs should not contain any PII/PHI**

* Department
* Office Location
* Remote vs. In Office
* Employee Tenure

For more info on CPPs as well as a list of our default CPPs, please click [here](#_Ref-2125690993).

Model



Deployment Options

Standard/Best Practice

Web-based survey, deployed via one of these methods:

* Secure using employee email addresses
* Secure using ForeSee provided Access Tokens
* Secure using multiple client provided Employee Tokens

Survey Statistics

We aim for 100% completion rate and provide guidance to clients around methods that can be used to increase participation, e.g., emails from HR/CEO, etc.

Complementary Touchpoints

The following are other products or measures that, when paired with the Employee Experience Measurement, have been shown to enhance the breadth, width, and scope of the solution ForeSee offers:

* Contact Center
* In-location Store Purchase or Browser
* In-location Store

Anonymity Requirements

* Some deployment options require using a survey token to provide individual employee information for validation of respondent’s employment. Tokens may include items such as employee ID, employee email addresses, birth date, etc.
* No personal information is saved with the survey, but is used for validation purposes only.

Available in these channels:

* Web
* Mobile (site only)

Why Use It?

Companies that gather feedback gain valuable and actionable input that improves both their customers’ experiences and the financial health of the company by driving higher conversion rates and reducing costs.

ForeSee’s new solution revolutionizes how marketers gather and analyze feedback. Practitioners can build surveys and implement digitally without IT involvement. Marketers and analysts can use our in-page analytics to gain insights without having to leave their own website.

The Topics feature of Feedback allows you to present a dynamic survey focused on areas you feel are important. For example, a Color topic may consist of questions about the appeal and quantity of product colors, along with suggestions for new colors. Another topic may be Technical Issues with a comment box for respondents to inform you of problems they may be experiencing with the web page.

You may also control where each topic displays on the web site by using the URL Targeting feature of the [Collection Methods](#-115832971) page. For example, if you have a product line where the Color topic does not apply, clear the Show Sitewide check box and list the URLs of the pages you want the Color topic to display on.

Target Audience

| Role | Relevant Concerns |
| --- | --- |
| Marketing Teams | * Brand reputation * Message clarity * Campaign effectiveness / drive sales |
| CX Teams  CI/Analyst Teams | * Ongoing pulse / monitoring * Effects of multichannel experiences on overall impression * Get funding |
| Channel or Category Marketing Manager | * Impressions with certain product pages * Barriers to selling products * Having persuasive / relevant content |
| Usability Teams | * Broken with site(s) / page(s) * What did we learn in the past before launching a new site? * Input on new pages, sections of site |
| Customer Service Teams | * Service recovery * Effects of other operations spilling over to them |

Actionable Insights

| Role | How Does Feedback Benefit Them? |
| --- | --- |
| Marketing Teams | * Star-ratings - reputation proxy * Create questions to ask about marketing messages * Overlay feedback with other campaign evaluation / KPIs |
| CX Teams  CI/Analyst Teams | * Topical ratings - (+) / (-) attitude indicators - risks * Quickly isolate where annoyances originate * Having strategic impacts + sizing up tactical issues = building stronger business case |
| Channel or Category Marketing Manager | * Focus only on their areas of responsibility * Know if site / pages worked well (overall and during campaign periods) * Understand if product content was helpful, clear |
| Usability Teams | * Immediate knowledge of what's broken * Draw from lessons-learned * Understand real-time task-accomplishment issues |
| Customer Service Teams | * Alerts directly route relevant feedback about Customer Service experiences (user as added input to CSRs) * Know if web / mobile site issues drove unnecessarily high call volumes |

Survey Statistics

Though we don’t have specific volumes around ForeSee® Feedback respondents as a percentage of total site visitors, which is due to the fact we don’t have access to their web traffic numbers, within the feedback industry the percentage of feedback respondents is thought to be around .1% to .3% of total site visitors.

Deployment Options

Standard/Best Practice

* [ForeSee® Cloud Deployment](#_Ref1560907512) is required.
* Provides a customizable badge to launch the survey. Customizations include color, positioning, label text, and hover animation.
* Provides a JavaScript function that the client can link to any badge/button/URL on their website as a replacement to the provided badge. Clients provide the customization to the badge/button/URL.
* Can be paired with ForeSee® Replay, which allows clients to view respondents' experience and analyze reported issues.

Functional

Functional is a single dedicated function-oriented measurement. For example, a store locator with ratings and reviews would be considered function-oriented website processes the user could engage in.

Available in these channels:

* Web
* Mobile

Why Use It?

Most companies have some form of an online process/tool on their website and often take these tools for granted. A poorly working tool or process can inhibit a user from accomplishing their task, leading to lower satisfaction and lower future behaviors. This issue is not industry specific either, whether a company is retail, financial services, or telecom, and whether they are focused on content or ecommerce, a well-functioning website is crucial to their bottom line success.

Target Audience

* Web/Mobile Content Managers
* eCommerce Managers
* Web Design Team

Actionable Insights

A financial services company found that two-thirds of site visitors were unsuccessful in the rewards program registration process. ForeSee’s Functional measure determined that the system was not matching the customer's entered information with their accounts and visitors felt there were too many steps in the process. The client eliminated one unnecessary step to the process and eliminated two of the required fields that customers needed to enter information into. The result was a 7% increase in respondents completing the registration process.

A Federal Government client found that some consumers who were trying to use their Complaint Assistant tool were having issues with the form displaying on their screens properly, causing errors and making it impossible for them to file the complaint. The root of the issue was that the tool was not compatible with the latest version of Windows. Improvements were made and satisfaction for the Complaint Assistant process improved from 68 to 77 within two months

A Consumer Products client determined that low satisfaction with the support section of their website was caused by inadequate functionality of the search tool, specifically, when customers searched for the product by model number. The client added a model number locator tool and a pop-up button that immediately pulled up the model number and keyword search field. Satisfaction jumped seven points in just a few months while all future behaviors increased between 3-6 points.

Common CQs

* Did you accomplish what you wanted to on the site today?
* Which of the following features/tools did you use today? (Please select all that apply.)
* What is your Satisfaction with (feature)?
* What would make the (feature) more useful?

Common CPPs

* Number of Page Views
* Language
* Referring URL
* Operating System
* Browser Name/Version

Also depending on device:

* Resolution/Screen Width/Height
* Dual Orientation
* Is\_Tablet

For more info on CPPs as well as a list of our default CPPs, please click [here](#_Ref-2125690993).

Model

May or may not include a full model (i.e., Elements, Satisfaction and Future Behaviors). This depends on the breadth of the experience. In some cases, Research many recommend only deploying a Non-Element Model or just Custom Questions and no Model.

Deployment Options

Standard/Best Practice

* [Trigger Code](#_Ref-1475923298)
* [SDK Code](#_Ref-174191949)

Types Of Functional Measures

* Search Measure - With the search feature of a website.
* Online Process Measure - With an online process, such as Find a Doctor, or Estimate Cost tool.
* Online Process Abandon Measure - With an online process, among visitors who began but did not complete the process.
* Application Measure - With a web application (accessed via website), such as quote application process.
* Other - If unsure about whether functional measure would be applicable, contact Sales Engineering.

Complementary Touchpoints

The following touchpoint, when paired with a Functional measure, has been shown to enhance the breadth, width, and scope of the solution ForeSee offers:

* A Functional measure tied to a Web/Mobile measure provides more granular insights into a specific feature or functionality within the larger site experience, such as:
  + Registration
  + Application
  + Find a Location/Service
  + Online Bill Payment
  + Comparison Tool

Survey Stats

The metrics provided below should be used as a guide - actual response and acceptance rates can vary significantly depending on the type of audience and their propensity to participate in surveys.

* Email Acceptance rates - 5-15% (depends on the type of audience, quality of email address, and how soon email is sent after the interaction).
* Email Completion Rates - 75-95%

Loyalty Program

Loyalty Program is a measurement of the client’s loyalty program targeting the entire membership audience.

* Examples of loyalty programs include:
  + Points Currencies
  + Personalized Offers
  + Member Privileges
  + Cash and Discount
  + Card-Based
  + Promotional Programs

Why Use It?

Offering a loyalty program to customers is a strategic decision that comes with a large investment for the potential of large fiscal gains. It is vital that this program is managed successfully so that it engages the customer but also drives up the bottom line.

Loyalty Program Measurement offers strategic insights such as:

* How does my program structure affect the overall loyalty program experience?
* Which areas help us to reduce member churn?
* Which channels are most effective for communication?
* What other loyalty programs are our members using?
* Which offers or rewards are most valuable to my members?
* How does the loyalty program influence spending on my brand?

Target Audience

Vice President or Director of Loyalty/Guest Loyalty/Global Loyalty/Customer Relationship Management, primarily within the Hotel, Travel, Financial Services, or Retail Industry.

Senior

Loyalty Executives in these industries oversee loyalty programs and innovation activity across the enterprise from ideation through implementation, with a special emphasis on driving more customer- relevant interaction that drives program engagement. Senior Loyalty Executives work in close alignment with the global marketing team.

Secondary

Vice President or Director of Consumer Insights or Marketing, primarily within the Hotel, Travel, Financial Services, or Retail industry.

Common CQs

* Program benefits usage/preferences
* Account management preferences
* Shopping frequency/spend habits
* Redemption preferences/behaviors
* Membership tiers
* Competitive program membership

Common CPPs

* Spend history
* Frequency of use
* Locations of use
* Membership Tier Level
* Membership Tenure
* Redeemed vs. Non-Redeemed vs. Expired Rewards

For more info on CPPs as well as a list of our default CPPs, please click [here](#_Ref-2125690993).

Model



Deployment Options

Standard/Best Practice

* [Email](#_Ref-1381366219)

Complementary Touchpoints

The following touchpoints, when paired with a Loyalty measure, have been shown to enhance the breadth, width, and scope of the solution ForeSee offers:

* Web/Mobile - Digital channels can serve as a key source for members to utilize their achieved rewards or self-service around their membership. Ensuring the digital experience is successful for loyalty members is vital in strengthening a company’s word of mouth.
* Contact Center - Loyalty program members may utilize a company’s contact center for assistance with their membership or to make a purchase using their rewards. Ensuring that contact center experience is successful reinforces loyalty program participation and drive word of mouth.
* In-Location Store - Stores often act as the main acquisition source for loyalty program enrollment. Understanding how these two experiences complement each other is important.

General Information

* Includes email invitation support and deployment.
* Includes reminder emails if needed.
* Client must identify eligible sample (emails preferred) based on sampling recommendations from ForeSee.

Survey Statistics

The metrics provided below should be used as a guide - actual response and acceptance rates can vary significantly depending on the type of audience and their propensity to participate in surveys.

* Email Acceptance rates - 5-15% (depends on the type of audience, quality of email address, and how soon email is sent after the interaction).
* Email Completion Rates - 75-95%

Digital Contribution

A Digital Contribution (a.k.a. Post-Visit measure) entails two phases. During the first phase, a customer visits a company site or contacts a call center and agrees to take a survey about that experience (typically a Browse/Site Management or Contact Center Sales/Service survey). Within the Custom Questions on that survey, they are invited to participate in a follow-up survey focusing on their actions after the initiating interaction with the company. If they agree, their email address is collected within the survey. Those who volunteered to participate in the follow-up are sent an email invitation from ForeSee allowing access to the second survey which focuses on their post-visit actions (e.g., made an online purchase, visited a store, purchased a competitor’s product).

Available in these channels:

* Web
* Mobile
* Contact Center (not as common)

Why Use It?

Marketing and customer experience leaders desire to know how effective their digital and customer care channels are at meeting customer expectations, and what things customers are seeking from those channels. To do so, they must gain an understanding of the customer’s reason for visiting and the actions they took after the interaction. However, this process is not easily observable. With this blind spot of the customer journey, leaders need to be able to discern how to improve their channels and the overall customer experience. Insights from Post-Visit include:

* How the digital channel impacts the customer experience.
* Identify expectation gaps between channels (digital and in-store).
* How to streamline omnichannel experiences.
* Why customers choose competitor products.
* Why customers walk away from purchases.

Target Audience

Strategic Marketing Leaders and Customer Experience Teams

Both strategic marketing and customer experience teams require a link between a visitors’ digital or customer care experiences and what they did after that specific experience. They need to know if customers/prospects were able to carry out intended actions (e.g., purchase a product in a store after they researched it online).

Actionable Insights

A company that specializes in outdoor work apparel sells most of their merchandise through independent retailers, and does not receive much feedback on the availability of their product, or their customer’s ability to find it through a retailer. Their customers often use the company site for product research and then shop in an independent retail store, leaving the clothing manufacturer with no insight on the customer’s ultimate behavior. Through the use of a Post-Visit Measure, the company discovered that a majority of their retailers were not carrying the same products as were displayed online, so customers would choose a similar competitive product that was available at the retailer. After receiving ForeSee insights, the clothing company understood which products had the highest demand which could influence supply decisions to better equip their retailers with an optimal merchandise mix.

An outdoor power equipment company showcased and displayed their products online, yet did not sell them directly to end-users/consumers. Instead, they provided links to retailers who sell their products through physical locations. The company wanted to understand who was coming to their site, what their goals were, and how satisfied they were with the experience. ForeSee revealed that over half of the visitors came to the site with the intent to research and make a purchase, but did not follow through in their purchase. They cited lack of product photos, difficulty finding items and poor item descriptions as reasons for not purchasing. The client also realized people were leaving their site in a dissatisfied manner after conducting their product research. To address some of the key impacts influencing their customers’ experiences, ForeSee recommended improving navigation, updating product descriptions, and including better photos on their website to increase satisfaction and the potential for future purchases.

Common CQs

* What was your initial intent - purchase or research/other?
* How many times did you visit the website/call the contact center during your research process?
* Have you done/which have you done since your online visit? (Visit the brand’s or brand’s competitor’s website, mobile channel, contact center, brick and mortar location)?
* Which best describes why you did complete the intended tasks within the initiating experience?
* Did you complete the intended task elsewhere? If so, where?

Common CPPs

For more info on CPPs as well as a list of our default CPPs, please click [here](#_Ref-2125690993).

Model



To access Post-Visit model templates, please click [here](https://myfsr.foreseeresults.com/clients/Research%20Library/Model%20Templates/Web%20Post-Visit%20Shopping%20Experience%20Model%20(formerly%20Multichannel).xlsx).

Deployment Options

Standard/Best Practice

[Email Invitation](#_Ref-1381366219)

Survey Statistics

* ForeSee typically captures 30-40% of Browse Survey respondent’s email addresses for utilization with the Post-Visit survey deployment.
* Email Acceptance rates - 5-15% (depends on the type of audience, quality of email address, and how soon email is sent after the interaction).
* Email Completion Rates - 75-95%

Complementary Touchpoints

The following touchpoints, when paired with a Post-Visit measure, have been shown to enhance the breadth, width, and scope of the solution ForeSee offers:

* Web/Mobile - Checkout or Cart Abandon - A poor checkout or cart experience could be preventing a high proportion of visitors from ever completing a purchase. Measuring what the visitor does after abandonment provides strategic insights into improving those processes and help understand the complex relationships between multiple customer touchpoints.
* Web/Mobile - Browse Measure - Providing visitors with all the information they need, when they need it and how they need is important in determining what the visitor does after their initiating experience concludes.
* Contact Center - Sales or Service Measure - Providing callers with all the information they need in an efficient manner is important to managing custom effort. A Post-Visit can provide insights on where the initiating experience fell short and the impact that had on the bottom line.

Initiating Measure / Post-Visit Linkage

* ForeSee created the Post Experience channel as a way to tie together data from an initiating measure and data from the corresponding Post-Visit measure. Instead of looking at separate n counts for separate measures, the Post Experience channel allows you to look at those visitors who completed a survey from both measures. This allows clients the ability to filter the initiating measure by some variable of importance and then view those respondents Post-Visit attitudes and behaviors.
* The n count within the Portal for the Post Experience channel is the number of respondents who left their email address within the initiating measure AND completed the Post-Visit survey.
* If you want to view the initiating measure data or Post-Visit measure data separately, you must search for them within their applicable channels within the Portal.
* You can choose to view the results within the time frame selected through the lens of either the initiating measure or the Post-Visit measure. Because the Post-Visit measure has an offset, the n count is always higher or exactly the same when choosing to view the results through the lens of the Post-Visit measure.
* You can have more than one initiating measure linked up to a single Post-Visit measure. There is a drop down where you select which initiating measure to show results for.
* It’s important to note that in the situation where you have more than one initiating measure linked to a single Post-Visit measure, you have the ability to select any of the custom questions as filters, even if they are from an initiating measure that you have not selected results for. If you want to filter by latent score you can only choose latents from the Post-Visit measure, not any of the applicable initiating measures latents.

Social Media

Social is a measurement of a client’s social media efforts across single or multiple platforms (e.g., Facebook, Twitter, etc.).

Why Use It?

Social can help you gain valuable, deeper insights into your social media audience. These insights can help you:

* Understand your social media audience by aggregate and type.
* Quantify the impact that your social media has on key behaviors.
* Prioritize improvements that can increase the likelihood of achieving desired behaviors by participants.
* Discover how your social media audience want to interact with you.

Target Audience

* Social Media Content Managers
* Marketing Managers
* Contact Center Directors/Managers

Common CQs

* How often do you visit one of the social media types?
* How do you typically access your social media accounts?
* How did you first become aware of this social media channel?
* Demographics
* Psychographics

Common CPPs

We are not able to capture CPPs for Social.

For more info on CPPs as well as a list of our default CPPs, please click [here](#_Ref-2125690993).

Deployment Options

Standard/Best Practice

* Static URL
* bit.ly or other shortened URL

Complementary Touchpoints

The following touchpoints, when paired with Social, have been shown to enhance the breadth, width, and scope of the solution ForeSee offers:

* CRM
* Employee Experience
* Loyalty
* Web/Mobile

General Information

* Must have a current Web or Mobile measurement in place.
* URL link placement subject to each social media channel’s rules about where third party content can be posted.
* URL link can be posted as many times as desired.
* Because these measures are deployed through static, opt-in links, we are not able to capture any CPPs.

In-Location Purchase/Browse - Store

IN-LOCATION (STORE) Purchaser

Measures satisfaction with the store experience among purchasers only, typically via survey invitations on a printed receipt, e-receipt, or email, and can be incentivized (sweepstakes, coupon). Full model. Includes hierarchy management/reporting.

IN-LOCATION (STORE) Feedback

Measures satisfaction with the Store experience among Non-Purchasers, but can include Purchasers if client would like. Typically deployed via store signage. Non-Element Model. Cannot be incentivized. Does not have hierarchy management/reporting.

IN-LOCATION (STORE) Browser

Measures satisfaction with the store experience among non-purchasers, but can include purchasers if the client would like. Full model. Typically deployed via store signage. Can be incentivized (sweepstakes, coupon). Includes hierarchy management/reporting.

Why Use It?

Shoppers have more control over where they spend their dollars than ever before. Prices, product reviews, and opinions are more accessible than ever via the web, mobile, and social media. Because of this, it’s critical that clients understand how the shoppers’ experience in the store impacts overall revenue, comparable store sales, and customer loyalty. Limited resources make it crucial that investments are prioritized right so you can stay current with shopper trends and preferences.

ForeSee continuously measures the shoppers’ view of their experience in your store through the lens of satisfaction. Satisfaction, when measured using this proven methodology, is predictive of future financial performance through future behaviors such as likelihood to return to the store and likelihood to recommend, while continuous measurement allows you to monitor the pulse of your shoppers throughout the year.

Target Audience

Target Selling Audience

Leaders of Customer Experience/Insights/Marketing

Corporate management requires insights into the performance of the chain overall, and the ability to prioritize initiatives and opportunities for improvement, including strategic aspects of the brand such as product and price.

Store Operations and Field Management

The store operations organization requires actionable data down to the store level to understand where to focus associate attention and efforts to improve same store sales.

Key Stakeholders/Users

Store Managers

While we don't sell Store Measures directly to store managers, they can still find data useful because store managers live in the store. They worry about hitting monthly sales targets and they want to know each week what they can do to coach their staff to drive up per transaction sales. They want to know what they can control, in their location, that makes customers come back to them.

Actionable Insights

* Retail industry client found that 25% of customers were not purchasing all they intended. The analysis revealed that associates were not offering special orders for out-of-stock products. These customer order value were $30 less per transaction, and they would end up buying at a competitor. During the time period analyzed it was a multi-million dollar loss.
* Retail industry client found that 75% of web visitors intended to purchase in store, and that close to 10% ended buying from a competitor based on a poor store experience. This drove them to begin continuous measurement in store including store execution steps.
* Product Retail industry client discovered 1/3 of customers had low Product Selection scores leading to a 20 point differential in Overall Satisfaction. ForeSee discovered this was due to stock-outs on desired product. Justified investment in tablet technology to empower associates to special order on the spot.

Common CPPs & EPPs

IN-LOCATION (STORE) Purchaser:

CPPs

* Store number (required)
* Transaction/Receipt number (required)
* Register ID (optional)
* Associate ID (optional)

EPPs

* Total order amount (gross or net)
* Total number of items in order
* Loyalty membership
* If purchase was sale/discounted

IN-LOCATION (STORE) Browser:

CPPs

* Store ID
* Date of Purchase

For more info on CPPs as well as a list of our default CPPs, please click [here](#_Ref-2125690993).

Model

Elements

* Store Atmosphere
* Service
* Merchandise
* Price
* Checkout

Future Behaviors

* In-Channel Purchase
* Other Channel Purchase
* Recommend Company

Common CQs

* Brand/Relationship CQ - How frequently do you visit BRAND stores in person?
* Service CQ - Were you approached by an associate on the sales floor?
* Channel CQ - Prior to your most recent store purchase, which of the following BRAND channels have you purchased from in the last year?
* Product CQ - What type(s) of product(s) did you purchase during this visit? (Please select all that apply.)
* Visit CQ - Were you able to purchase everything you intended to during your store visit?

Deployment Options

Standard/Best Practice

|  |
| --- |
| Note: Multiple deployment options can be utilized for a single measure. |

* Store Purchaser: POS Receipt, eReceipt, IVR
* Store Browser: Store Signage (SMS Text Back, Bit.ly URL, or QR Code)
* Store Feedback: Store Signage (SMS Text Back, Bit.ly URL, or QR Code)

Alternative Deployment Options

* Email (All measures)
* IVR (Browser or Feedback)

Complementary Touchpoints

The following touchpoints, when paired with an In-Location Store measure, have been shown to enhance the breadth, width, and scope of the solution ForeSee offers:

* Fulfillment - Not every customer who goes to a store is going there to buy or will leave with what they intended to buy. Sometimes the store doesn’t have their item in stock and they end up ordering it for delivery or pick-up; sometimes the order has already been placed in a different channel. Fulfillment provides a seamless transition between the complicated relationship stores play in getting the product into the hands of the consumer.
* Web / Mobile - Browse, Purchase, Abandon - Adding a digital measure can help define the customer journey. Maybe the customer browsed online to get information on the product and intended to purchase in the Store channel all along. Maybe they were unable to finish the checkout process online and finished in the store channel.
* Contact Center - Both Contact Centers and Stores are channels for purchasing behaviors, and as such provide a sample of people making a conversion and rating the experience of doing so. Being able to measure both in the same way is a step in creating a multi-channel view of the customer.
* Employee - It’s safe to say that when elements of the Store model include Associate Engagement and Service keeping a pulse of your employees and understanding their motivations and concerns is important. Because ESat drives CSat, it’s imperative to be aware of opportunities for increased employee satisfaction.
* Add-On Store Measures can be purchased at a lower price. Hierarchy must be the same.

Store Purchaser/Browser Incentivization Information

Sweepstakes

* ForeSee has the ability to set a persistent cookie which would take the respondent to the sweepstakes page if they tried to take the survey again (Browser only).
  + This cookie only works if the IP address is the same, as there is a possibility that some respondents could take the survey multiple times, but it would be considerably reduced.
* The incentive management company that we work with removes duplicate names before any prize drawing.
* ForeSee has the ability to manage the client’s sweepstakes. We charge an incentive management fee, which includes the part IS handles:

ForeSee® Incentive Management assumes:

* + Monthly drawing
  + One gift card awarded per drawing
  + Prize value does not exceed $500 U.S. Dollars
  + US/UK residents only

ForeSee® Incentive Management includes:

* + Winner selection and notification
  + Winner compliance and verification (tax forms, affidavits, etc.)
  + Rules development
  + Bonding and registration as required

Coupon

* The coupon page or email are both configurable, but there are guidelines to the coupon code that we generate.
  + ForeSee uses an algorithm to randomly create a coupon code. ForeSee does not have the ability to choose from a list of predefined codes or host a static code which would have to be updated frequently.
* ForeSee has created a Smart Thank You Page that allows a respondent to enter their email address and have a coupon emailed to that email address.
  + Page checks to see if the email address has already received coupon email within a given period of time (which is configurable).
  + Store Purchaser - system validates if a different transaction number was used, could potentially send out another coupon.
  + If the client chooses this option, they cannot have any other STYP page enabled.

Store Purchaser/Browser Fraud Deterrents

ForeSee can provide methods to evaluate and prevent gaming through several means. Fraud deterrents can be automated as well as just provided in a monthly fraud report that would be used for monitoring purposes only. Deterrents include the following security methods:

* CAPTCHA security at the point of entry to reduce/eliminate machine based or automated script based entry.
* Survey Time Less than 90 second (is configurable) - If a respondent takes less than 90 seconds to complete their survey, their responses are not loaded in the portal. Updates to the survey completion time threshold can be accommodated on a quarterly basis if needed.
* Same UID (cookie) within 48 hours - Upon accessing the store landing page, a cookie is dropped on the respondent’s system. Each time the respondent accesses the landing page, a check for the cookie is performed and if the timestamp on this cookie falls within 48 hours, the respondent is allowed to take the survey, but their results are not loaded into the AAP. Updates to the time period threshold can be accommodated on a quarterly basis if needed.
* Validation of the cashier ID beyond the standard solution, building in logic which would not accept the same # (77777) or sequential patterns (12345) - dependent on these patterns NOT being possible within the a valid code.
* Same IP Address within 48 hours - Upon accessing the store landing page, a check is performed to identify whether the respondent’s IP Address matches any IP addresses already collected within the last 48 hours. If a match is made, a flag is added to the respondent to identify them as duplicate IP address respondent. The respondent is allowed to take the survey and their results are loaded to the portal along with the duplicate IP address flag. If duplicate IP addresses are occurring too often, we can re-evaluate whether the data should or should not be loaded into the portal.
* Unique, non-repeatable survey URL combinations which eliminate bookmarking or automated repeat entry.
* ForeSee has the ability to send a monthly report of “flagged” respondents identified by the fraud prevention measures – providing a method for assessing and adjusting fraud parameters where needed.

Store Purchaser/Browser Hierarchy Information

* ForeSee supports a 1-to-1 relationship within the hierarchy.

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| Example: One store rolls up to one district rolls up to one region, etc. |

* ForeSee supports eight hierarchy levels and seven attributes.
* Once a store is part of the hierarchy, it will always be part of the hierarchy. Stores are not removed from the hierarchy once they have been added. If a store closes and you do not want to see it included as part of its previous hierarchy within the reporting, please work with your CX Analyst to create and move it into appropriate ‘closed’ hierarchy levels (Ex. District 9999). A closed hierarchy report still runs but can be disregarded.
* In the event a change occurs in the hierarchical structure, for example, Store 123 moves from District A to District B, all historical data is reported as if Store 123 was always in District B.
* If a store closes, the store ID should not be reused for a future or new store. If a store ID is re-used, all of the historic data previously collected under that ID remains attached to it.
* A best practice is to include the store ID as the lead-in on the store name. This helps identify stores in the portal as the \_NAME field is what is used for the label.

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| Example: Store Name = 0001-ForeSee East instead of ForeSee East. |

Survey Statistics

The metrics provided below should be used as a guide - actual response and acceptance rates can vary significantly depending on the type of audience and their propensity to participate in surveys.

* IVR Acceptance rates - 20-60% (Vary significantly based on audience being targeted and length/type of call).
* IVR Completion rates - 85-95%
* Email Acceptance rates - 5-15% (depends on the type of audience, quality of email address, and how soon email is sent after the interaction).
* Email Completion Rates - 75-95%
* POS Receipt acceptance rates - 1-3%
* Incentivization rates - ~90% of Store clients offer incentivization:
  + ~35% coupon
  + ~65% sweepstakes

Standard Page Flow

Store Purchaser Flow

* Language Page (Optional)
* Pre-Landing Page (Optional)
* Landing Page (Required)
* Qualify Page (Optional)
* Survey (Required)
* Smart Thank You Page(s) (Optional)
* Sweepstakes Page (Optional)
* Coupon/Thank You Page (Optional)
* Thank You Page (Required)
* Age Error Page (Required)
* Survey Expired Page (Required)
* Sweepstakes Thank You Page (Optional)
* Sweepstakes OAMOE Page (Optional)
* Footer (Required)

Store Browser Flow

* Language Page (Optional)
* Pre-Landing Page (Optional)
* Landing Page (Required)
* Qualify Page (Optional)
* Survey (Required)
* Smart Thank You Page(s) (Optional)
* Sweepstakes Page (Optional)
* Coupon STYP (Optional)
* Thank You Page (Required)
* Age Error Page (Required)
* Over 7 Days Error Page (Required)
  + Number of days is configurable - should match Store Purchaser offset.
* Survey Expired Page (Required)
* Sweepstakes Thank You Page (Optional)
* Sweepstakes OAMOE Page (Optional)
* Footer (Required)

Store Feedback Flow

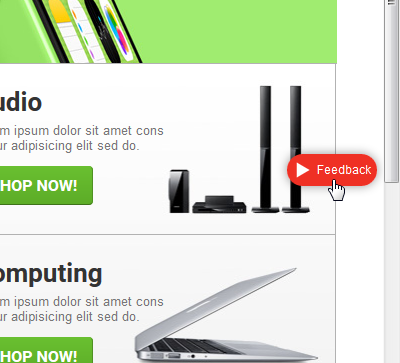
* Language Page (Optional)
* Pre-Landing Page (Optional)
* Landing Page (Required)
* Survey (Required)
* Smart Thank You Page(s) (Optional)
* Thank You Page (Required)
* Over 7 Days Error Page (Required)
  + Number of days is configurable - should match Store Purchaser offset.
* Survey Expired Page (Required)
* Footer (Required)

Feedback

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| About ForeSee® Feedback Surveys |

ForeSee® Feedback presents visitors with the opportunity to communicate their experience at any given point of their visit. ForeSee® Feedback allows participants to select specific or general areas to rate or comment on.

ForeSee® Feedback surveys are presented to shoppers on the page(s) you select when they click the Feedback Badge:



You may also use a [JavaScript function call](#1092707431) to display the survey instead of the Feedback Badge, as well as a [Web Link](#-1369030366), which can be used in emails and on social media pages.

According to your Survey Delivery settings, the survey displays as either a new tab/window or an overlay. This allows the respondent to complete the survey and continue shopping without moving from the page where they initiated the survey.

The data collected by a Feedback survey is accessible from the [Feedback Surveys](#-1085909528) section of the Surveys page, or from the [In-Page Reporting](#_Ref-1459194991) feature.

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| Creating a Feedback Survey |

1. Click Surveys in the top ribbon. The [Surveys](#_Ref710342630) page displays All Surveys by default.
2. Go to the Feedback Surveys section, which may be located below the CX Surveys section. You may also click Feedback Surveys in the navigation ribbon below the [filters ribbon](#-666924088).
3. Click +Add Feedback. The Edit Survey page displays, which is comprised of a list of question types and available topics in the left rail, and a default survey. The default Feedback survey contains the following components:
   * Upload Your Logo or Upload a Background - You have the option to add an image to the survey. A standard File Upload window displays for you to navigate to and select the desired image file. Otherwise, the default white background with no logo displays.

Images can be up to 10M in file size and of the following file types: JPG, JPEG, GIF, BMP, TIFF, PNG, PSD, and SVG.

* + Welcome Message, Star Rating, a Choose a topic menu, and a Thank You message:
    1. Click the text of each item to enable editing. You may also edit the Project Name in the same manner.

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| Note: Leave the Choose a topic menu as is to omit this from the published survey. |

* + 1. When you have finished editing each question component, click Save. The component closes to editing.

Adding Questions and Topics

See [Topics](#_Ref-2010693117) for information on using topics to create a dynamic survey, i.e., a survey that offers questions based on answers to preceding questions.

1. Drag the desired component from the left rail to the survey above the Thank you message. When you hover over a valid place in the survey, a target box displays to drop the item. To add a topic, hover over a valid location on the survey to display the Add a New Topic action and click.
2. Click the Expand icon () to open the Editor tab.



1. Click the text of each item to enable editing to add your question text and answer choices n the Editor tab. You can also add [Skip Logic](#_Ref-1857573160) to the question on the Logic tab, as well as click the Required icon () to designate the question as mandatory for the respondent to answer.



1. All added components and topics have a delete icon, directional arrows to move the item up or down, and copy icon to add it to the Clipboard.

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| Note: The directional arrows of a component allow you to move within the topic. To move a component to another topic, click the Copy icon to add the component to the Clipboard section of the left pane. Drag the component from the Clipboard to the new topic, then click the Delete icon of the component in the unwanted topic. |

1. Click Next to advance to [Collection Methods](#_Ref425678766).

Edit a Feedback Survey

1. Click Surveys in the top ribbon. The [Surveys](file:///C:\Users\kevin.beauman\Documents\Content\Feedback\cxSuite\aboutSurveys.htm) page displays All Surveys by default.
2. Go to the Feedback Surveys section, which may be located below the CX Surveys section. You may also click Feedback Surveys in the navigation ribbon below the [filters ribbon](file:///C:\Users\kevin.beauman\Documents\Content\Feedback\cxSuite\aboutSurveys.htm).
3. Click the Edit icon () of the desired project. The Edit Survey page displays, which is comprised of a list of question types in the left rail and the survey to be edited. See [Creating a Feedback Survey](#_Ref-818973671) for information on adding or editing question and topics.



1. If you do not wish to revise the survey itself, you can jump to the [Collection Methods](#_Ref425678766) or [Publishing Settings](#_Ref489420430), which are available in the ribbon above the survey, or click Next in the bottom-right corner of the page.
2. When you have completed your edits, you can go to [Publishing Settings](#_Ref489420430), or click Publish to Production to instantly migrate your edits.

Skip Logic

When adding a question to a survey, you can also add Skip Logic to guide the respondent to questions directly related to an answer choice. Skip Logic is similar to [Topics](#_Ref-2010693117), but function within a Topic.

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| Example: If a respondent chooses a star rating higher than three, the next question might be, "Please tell us why you think so highly of our service?" If the respondent chooses a star rating of less than three, the next question might be, "Please tell us what went wrong." |

The Logics tab allows you to add basic logic to any question within a topic based on previous question responses. Logic can be configured based on a ratings, less than, greater than, or equal to an answer choice, as well as a keyword in an open end.

To add Logic to a question:

1. Click the Logic tab from within the question Editor. See [Adding Questions and Topics](#2022191348) for instructions on accessing the question Editor.
2. Select a question from the Choose a question menu which determines whether this question is displayed to the respondent. Depending on the type the question you are adding to the survey, one or more additional menus display.
3. From the menus, select the logic criteria.
4. Optionally, click the Add icon (+) to add a second level of logic and repeat the process of adding logic criteria.
5. Click Save to store your added logic. The Logic icon () displays within that question



Optionally, you can make the question required by selecting the Required icon ().



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| Topics |

The Topics feature of Feedback allows you to present a dynamic survey focused on areas you feel are important. For example, a Color topic may consist of questions about the appeal and quantity of product colors, along with suggestions for new colors. Another topic may be Technical Issues with a comment box for respondents to inform you of problems they may be experiencing with the web page.

You can set your Feedback survey up so that when a respondent opens the survey, they see two questions. They can enter a star rating and then select a desired topic. The questions you assign to the selected topic then display for the respondent to complete.

You may also control where each topic displays on the web site by using the URL Targeting feature of the [Collection Methods](#-115832971) page. For example, if you have a product line where the Color topic does not apply, clear the Show Sitewide check box and list the URLs of the pages you want the Color topic to display on.

Add a New Topic

Go to the [Edit Survey](#2022191348) page to set up a topic, hover the mouse cursor over the survey, moving down the page, until the Add a New Topic action displays and click.

Deploying a Feedback Survey

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| Collection Methods |

Use the Collection Methods page to manage how your survey is presented to the end-user. When [editing](#_Ref1196811020) or [creating](#_Ref-818973671) a survey, click the Collection Methods link near the top of the page to display these settings.

The Collection Methods page offers the following options:

* [Web Link](#-1369030366) - Use a hyperlink for email invitations, link on your social media page, etc.
* [Site Badge](#1092707431) - Use a badge, button, or image to launch the survey.

Web Link

Using a web link is, perhaps, the quickest way to start collecting responses. This collection method requires you to [create a Feedback survey](#_Ref-818973671), configure the URL settings (which is done on this page), and [publish](#_Ref489420430). The link is offered during this final step and can be copied and pasted as needed.

You can set the link to deactivate on a specified date, and determine the message that displays to visitors who click the link after the set date:

1. Click the Edit icon () for Web Link. The Web Link page displays.



1. If the Never option is selected for This Link Deactivates, click On. A date field and text box displays.
2. Click in the date field to display a calendar to select the deactivation date.
3. In the text box, type in the message you want to display to those who click the link after this date and click Save Settings. The Collection Methods page displays.

The actual link is available on the [Publishing Settings](#_Ref489420430) page.

Site Badge

The Site Badge collection method allows you to set how and where respondents access the survey, as well as how the survey is presented. Click the Edit icon () for Site Badge to display the Badge Setup page. The following setting groups are available on the left rail:



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| Note: Once a respondent completes a survey, the badge is hidden from your web page to prevent multiple submissions during a single visit. |

* [Design Options](#-1210566382) - Set badge design and which device types to show the badge on.
* [URL Targeting](#-115832971) - Set which web pages display the badge, as well as what topics.
* Replay Options - Turn ForeSee® Replay off or on for the project. This only displays for clients with a Replay contract.

Design Options

Settings for each device type are the same. Select Hide to copy a code snippet for either a button or link deployment method.

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| Note: The example Click here to provide feedback button and link are for demonstration purposes only and are non-fuctioning. |

Select Show to set the following options. Your selections display in the preview pain on the right:

* Badge Icon - Select the icon to display with the Button Text.
* Button Text - Type in the badge label.
* Text - Click to display a dialog with suggested colors to select and a text box to type in a hexadecimal color code.
* Badge - Click to display a dialog with suggested colors to select and a text box to type in a hexadecimal color code.
* Rotation - Displays the badge vertically or horizontally.
* Size - Click on the Small, Medium, or Large size setting to adjust the size of the badge.
* Position - Set the location of the badge on the screen.
* Survey Delivery - A menu of options for how the survey appears to the respondent.
* Scroll Behavior - When selected, the badge maintains position in the browser window regardless of page scrolling.

Click Save Settings to apply them to your survey project.

URL Targeting

The URL Targeting page allows you to set the survey project to Show Sitewide, or select which page(s) to include or exclude the survey on. These settings can be applied at the Survey Level and/or the Topic Level.

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| Example: Your online store has clothing lines for men, women, and children. Your survey project contains topics with questions specific to each clothing line. To display the Children topic:   1. Click the Topic Level tab and click to clear the Show Sitewide check box. 2. Click to expand the Topic: Children topic heading. 3. In the Include text box, enter the parent URL of site pages containing these items with an asterisk widecard, e.g., http://ABCcompany.com/apparel/children\*. The asterisk allows you to avoid entering every site page that starts with the same parent URL. 4. Click Save Settings.   Upon [Publishing](#_Ref489420430), shoppers only see the questions of the Children topic when they click the FeedBack Badge while viewing these pages. |

Another possible scenario is when you want to prevent the badge showing on the checkout pages. In this case, use the Exclude text box of the Survey Level tab to enter these pages.

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| Hint:   * If your site displays the URL with both http and https, create the entry with an asterisk (\*) before the domain. Example: \*ABCcompany.com * If your staging environment has different URLs than production, be sure to include both staging URLs and production URLs. * If the ForeSee code is deployed across multiple country pages, be sure to specify which domain you expect the survey to appear on. Example: \*ABCcompany.com/cart\* instead of \*cart\*. * Remove all slashes (/) from the end of a URL. |

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| Publishing a Survey |

The Publishing Settings page can be accessed from the Feedback Surveys section of the Surveys page. Click the Edit icon () of the desired project and then click Publishing Settings in the ribbon above the page.



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| Note: The Web Link Survey URL sections of the Staging Servers and Publishing Servers panes are used for the [Web Link Collection Method](#-1369030366). |

Going live with a survey is a two-step process where you first migrate the survey to a preliminary environment, such as Staging or QA. This allows you the opportunity to review and test the survey before going live. If your project is Active in Staging, revisions are automatically migrated to your Staging environment. Then publish to Production to display the Feedback Badge on your web site. If you do not have a preliminary environment, click Publish to Production in the top ribbon.

Publish Your Project

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| Note: Before publishing, verify each web page from which the survey can be launched contains the [Installation Code](#_Ref1560907512) snippet. |

Use the Status toggle switch to activate or deactivate the survey in either environment. A progress bar displays to show your setting is being deployed to the corresponding server. When the process is complete, a message displays along the bottom of the screen and the Status is updated.

When you have a need to stop collecting data for a given period of time, you can turn the survey off, i.e., set the Status to Inactive. When you turn a survey off, the previously collected data remains accessible and you may activate the survey again at any time.

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| Example: A survey that collects customer feedback on seasonal merchandise or services, annual promotions, or the introduction of a new product line. You can turn this survey off to preserve the collected data for future planning and comparison reports, and then activate the survey for the next event or season. |

Viewing Feedback Data

See also: [In-Page Reporting](#_Ref-1459194991)

Analyze the results of a survey and view data at a variety of perspectives and granularity. These results may be accessed from the Surveys page by:

* Clicking the project name to display the Analyze Survey tab.
* Clicking either the Analyze Survey icon (), View Survey icon (), or the See Respondents icon () for the project.



The project name, [Date Picker](file:///C:\Users\kevin.beauman\Documents\Content\CaseMgmt\datePicker.htm), and Add Feedback Filter menu display along the top of the page with the following tabs available:

Analyze Survey

This tab displays interactive summary counts along with trend lines for submissions and overall rating. The following features are available:

* Download PDF - Generate a PDF version of the data currently displayed.
* The Activity pane shows the number of Submissions and the Average Rating of those submissions.
* Active Topics is a pie chart comparing the number of submissions for each topic within the project. Hover over a topic in the key to highlight the corresponding slice of the pie chart. Click on a topic in the key to toggle the data in and out of the graphic.
* The Submissions bar chart illustrates increases and decreases of submission over the span of the selected Date Range. Each bar contains the N count for each topic and the total. Hover over each section of a bar to view the actual N counts. Click on a topic in the key to toggle the data in and out of the graphic.
* The Overall Rating trend line displays variations in ratings over the span of the selected Date Range. Hover over each point of the graph to view specific data.

View Survey

The View Survey tab is a breakdown of answers per N count. Each topic, with its associated questions, is displayed in the same sequence as the survey, and may be collapsed to focused viewing of specific topics. Each question of the topic is displayed in a separate pane with data for each answer option and the total N count for the question. The following data is displayed:

* Distribution - The percentage of respondents who selected this answer.
* - The number of respondents who selected this answer. The total number of respondents who answered the question is displayed in the upper-right corner of the pane.



* - The average star rating for the respondents who selected the corresponding answer. In other words, the group of respondents who selected this answer choice also gave this star rating (by average).



See Respondents

Responses grouped by date and listed in descending order of submission. Click Download to export a Comma Separated Values (CSV) file or Portable Document Format (PDF) file of the displayed data.

The default view of the See Respondents page contains the following columns:

* # - A reference number unassociated to the response and serves as running count of responses. For example, if a date range contains 100 responses and you sort the data by the Satisfaction column in ascending order, the #1 response may become #50.
* Date - A timestamp of when the survey was submitted. The data is sorted by this column to show the most recent response. Click the menu icon () to change the sort order.



* Replay - The Replay icon () displays when a recording is available for this respondent.



* Rating - The star rating which the respondent selected.

Click a respondent to display the [Respondent Detail](#_Ref1604052860) page where you can view User Details, question responses, and (for Replay clients) the [Replay](#_Ref-1812811023) recording of the session. Use the left navigation menu to move up or down on the page to a specific section.

Click Customize Columns to view and select the data you wish to view and click Apply. The column is added on the right. You can drag and drop columns to arrange them as desired. You may also drag the edge of a column to adjust the width.

To save a custom view:

1. Click Saved Views and then click New Saved View. A dialog displays for you to type in a name for the view and you may also select Make This My Default View.
2. Click Save View. The dialog closes and your new view is now listed on the Saved Views menu, where you can click the name to apply the view, as well as edit or delete the view.

Filtering Data

In addition to the [Date Picker](#_Ref-125715616) and [stored filters](#-623541622), you may also filter data using the following options:

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| Note: Saving filters is currently unavailable for Feedback. |

Analyze Survey

* To view data for one or more topics, click the topic name(s) in the color key of the Active Topics or Submissions cards. Your selection displays in the left pane as a record of how the data is being filtered. Click the Close icon (X) to remove the filter and show all data again.
* To view a single day's data, click the data point for the date on either the Submissions or Overall Rating cards. The date range changes to the selected date.

View Survey

* Click one or more answer choices to view the data of responses having the selected answer choice(s) in common. Your selection displays in the left pane as a record of how the data is being filtered. Click the Close icon (X) to remove the filter and show unfiltered data again.

See Respondents

* Responses can be sorted by the menu near the top of the page. The default setting is Date - New to Old, which groups all responses of each day starting with the most recent.
* Type one or more key words into the Search field to view responses containing your entry.

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| In-Page Reporting |

In addition to viewing reports in ForeSee® Feedback, you can display the Analytics tab directly from your web page as a slide-out.

To view In-Page Reporting

1. Using a web browser, go to the desired page of your web site, add the following syntax to the URL: /#acscommand=feedbackreport and press the Enter key of your keyboard. The page refreshes with a new badge in the upper right of the page.
2. Click the badge. The Feedback Login page slides out.
3. Type your login credentials and click Sign In. The [Analyze Survey](file:///C:\Users\kevin.beauman\Documents\Content\Feedback\feedbackDashboard.htm) page displays.
4. In the left pane, select the desired Project, along with any additional menu items available.
5. Unique to In-Page Report, you may view the Current Page (default), Current+ (which are pages on the same hierarchy level and lower), or the Entire Site. As in Feedback, you may also view or save a PDF of the page in view by clicking the Download icon ().



1. Click Logout to close In-Page Reporting. However, the badge remains until you delete the added syntax in the URL and refresh the browser.

Respondent Details

Respondent Details are available from the [See Respondents](file:///C:\Users\kevin.beauman\Documents\Content\cxSuite\respondentDetails.htm) page by a click/tap of an individual respondent row. The page consists of a left navigation pane and respondent data, which is organized into sections like [Replay](#_Ref-627412881), the respondent's answers to survey questions, and User Details, such as device information, operating system, etc.

Using Respondent Details

The Respondent ID is displayed along the top of the page with a Return button to display the See Respondents page. The following features are available below the Respondent ID:

Left Navigation Pane

* Row # - The reference number from the See Respondents page indicating this respondent's place in the sort order of the Default View.
* Survey Taken - The date and time the survey was submitted. Eastern Standard Time (EST) for CX Survey and Coordinated Universal Time (UTC) for Feedback.
* Section Menu - Categories of the details where you can click/tap to view.

You may also hover over the left or right side of the screen to display the scroll feature, which allows you to move from one respondent's details to another, based on the Row #.

MobileApp

ForeSee is currently in the process of switching to a new version of the mobile application while continuing to support the previous version.

This version of the mobile application is designed for upper-level management who desire a quick view of scores at the measure level.

System requirements:

* A non-tablet device
* Android 4.4 or newer
* iOS 9 or newer

Available via the iTunes Application Store and Google's Play Store as a FREE download. Search the term ForeSee.



Logging into the ForeSee® Mobile App:

1. Tap the ForeSee icon on your screen. The Login page displays.
2. Type your existing ForeSeeUser Name and Password.
3. Tap Sign In to launch the application. The CX Pulse screen displays.

CX Pulse

As the default landing screen, CX Pulse is comprised of the first six measures listed alphabetically, and their scores. Below the list a notation on the measure which experienced the greatest change in score for the time period. Continuing down the screen is the See All Measures link to the [CX Journey](#51729613) screen. The bottom two sections contain the Recommended Priorities by Measure card and, for clients with Feedback, a summary of those responses.

Recommended Priorities by Measure is a spot light on the measure with the highest Priority Ratio score. This is derived from the monthly stored impacts that Customer Satisfaction score (CSAT) has on the Likelihood to Recommend and the CSAT score itself.

VOC Feed

The Voice of Customer Feed screen lists all open ends from both CX Measurement and Feedback surveys. Responses may be sorted by date (newest first), lowest score, and highest score.

CX Journey

All measures are displayed for the previous day, seven days (default), 30 days, and 90 days. Touch a measure to view details.

Case Management

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| About Case Management |

Case Management issues can be created directly from a survey or be manually entered to manage the lifecycle of a problem resolution or the implementation of improvements. This type of application has several categorizations:

* Closed Loop Management
* Find and Fix
* Recovery Management
* Issue Management

A Case is a single repository consisting of the original issue, customer contact information, internal attachments and notes, as well as documentation of what actions are taken in response to the issue. A case is expected to be resolved within a specific time frame (e.g., 72 hours) of its creation. Therefore, Case Management functions on a real-time basis in order to present the most current information.

User Roles

There are two main user levels for Case Management:

* Caseworker - This user level sees only cases assigned to them. Caseworkers can add, work, escalate, and resolve a case within their assigned hierarchy level, i.e., they cannot access a case assigned to another caseworker. See [Work on a Case](#_Ref-153074221) for additional information.
* Manager - This user level sees their assigned hierarchy level, such as a district or region. Managers can perform all the same tasks as a caseworker, but have access to all cases under their supervision. See [Managing Cases](#_Ref1627561597) for additional information.

Supported Measures

Case Management creates a case automatically when a rule is set in a hierarchy supported ForeSee CX Measure to identify a specific survey response, such as an overall Satisfaction score of less than five. Manual cases are not created from a survey, but must still be associated with a hierarchy supported ForeSee® CX Measure in order to be reported in CX Suite.

Currently, the following CX Measures are capable of integrating with Case Management:

* Location/Store
* In Store Pick Up/BOPIS
* Contact Center (No IVR)
* Fulfillment

Getting Started

Create an Automated Case

Case Management creates a case automatically when a rule is set in a hierarchy supported ForeSee CX Measure to identify a specific survey response, such as an overall Satisfaction score of less than five.

The process:

1. A respondent takes a survey for a hierarchy supported ForeSee® CX Measure.
2. Based on the respondent’s answers to certain questions, a rule may be triggered, such as Satisfaction less than five for the overall Satisfaction question.
3. A Contact Us Thank You Page displays once the respondent has submitted the survey.
4. The respondent fills out their contact information and submits the form.
5. A case is then automatically created with the contact information and other data that may provide additional insight.
6. An alert notification is sent to the assigned caseworker notifying them of the open case that needs their attention.
7. An alert notification is also sent to the respondent letting them know a case has been created on their behalf and someone will be contacting them shortly.

Create a Manual Case

1. On the Cases page, click Create New Case. A dialog displays.
2. Complete all required fields, which are indicated by a red asterisk (\*)
3. Click Create Case. The Case Details page displays information associated with the case.

An alert notification is sent to the assigned caseworker notifying them of the open case that needs their attention. An alert notification is also sent to the respondent letting them know a case has been created on their behalf and someone will be contacting them shortly.

Managing Cases

Monitor Cases

By default, the Manage Case page displays the Summary tab, which is a summary table of cases the caseworker has access to. Cases display by either a certain level of the hierarchy or by individual cases and may be sorted by clicking on any column name.

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| Example: A supervisor sees a hierarchy view based on their assigned level, such as a list of stores, districts, or departments. A caseworker only sees a list of individual cases assigned to them. |

To view a specific case:

* Select, or search for the desired hierarchy level from the Hierarchy Filter and click the desire case name.
* Type the desired hierarchy level into the Search field above and click the desire case name.
* Click the hierarchy name to drill down into the levels of the hierarchy.

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| Note: If, as a case worker, you only have permissions to see your specifically assigned cases, the summary table shows cases within each row that you can click on to display the specific case. |

The following features are available on this page:

* Date Range - A menu of time ranges to view data from.
* [Hierarchy Filter](#_Ref1693955634) - A menu of the hierarchy levels a caseworker has access to.
* Search - This text box allows a user to enter a case number, name of case assignee, or store number.
* Overall Resolve Rate - The number of cases resolved divided by the total number of cases for the selected Date Range and hierarchy level.
* Total Cases - The sum of all cases for the Date Range and hierarchy level.
* [Create New Case](#_Ref2025568434) - Start a case manually.
* Hierarchy Breadcrumb - The level of an organization's hierarchy associated with the case. See [Supported Measures](#396753302) for additional information.
* Pagination - Use the left and right arrows to scroll through pages.
* Items per page - A menu in the lower-right corner to select the number of list items to display on a page.

Open Tab

The Open tab is a table of active cases with sortable columns. Click a Case Number to display the case.

Escalated and Resolved Tabs

The layout of these tabs is similar to the Open tab and contain cases in these respective categories. See [Escalating a Case](#_Ref-153074221) and Close a Case for additional information.

Using the Date Picker

Click on the date range at the top of the page to display the Date Picker. The Date Picker offers the following options for limiting data to a specific range of dates:

* A list of preset date ranges along the left side which you can select to implement. When you click on a range the Date Picker closes and the screen refreshes to display data within the selected dates.
* Start Date and End Date text fields where you can type in the desired dates. When you enter the start and end dates the screen refreshes to display data within those dates.
* A calendar displaying the current and previous month and the current date range highlighted. Click the start and end dates to set the range. Use the single arrows (< and >) to scroll one month at a time. Use the double arrows (<< and >>) to scroll one year at a time. When you select the start and end dates the screen refreshes to display data within those dates and the Start Date and End Date fields are updated.

Click Apply Date Range to view data from the selected dates. Click outside the Date Picker to cancel.

Using the Hierarchy Filter

The Hierarchy Filter displays in the top ribbon next to the [Date Picker](#_Ref-125715616) and offers the following options:

* Search - Type in a hierarchy level. As you type, a list of hierarchy levels matching your entry displays.
* Locations - A tree view of locations which may be deselected to omit them from the display. When you deselect a parent location, the child locations are also deselected. If you select a child location, only data from that location, and its child locations, display. For Case Management, only a single child location can be selected.

The filter only displays three levels for simplicity. When you drill down to a lower level, a Return button () displays for you to move back up one level.



Work on a Case

Click a Case Number to view the Case Details page. The top ribbon displays the Case Number, a brief summary of the client sentiment derived from the open ends, and a link to hide or show the Activity pane. The left pane of the page displays detailed case information and the following options:

* Escalate - Click to assign the case to a predetermined person, such as a manager.
* Priority - A menu of options to set the importance of resolving the issue.
* Case Status - A menu of options to set the workflow progression.
* Issue Type - A menu of options to assign a category to the case.
* Actions Taken - A menu of standard steps to resolve the case.

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| Note: These features are disabled for Resolved cases. |

Activity

The Activity pane displays a detailed record of the case, e.g., how the case was generated, who the case was assigned to, and the caseworker's interaction with the customer. The free-form text field along the bottom allows the caseworker to either correspond with the customer or add an internal notation regarding the case.

Add a Reply

1. Select the type of reply you wish to add. A message displays informing you who will see the reply.
2. Optionally, click the Additional Features icon (+) to attach a file or choose a template:
   * Attach a file:
     1. A file browser window displays for you to navigate to and select the desired file.
     2. The attached file displays below the text field. To remove the file, click the Delete icon (X).
   * Choose response template:
     1. A dialog displays with a list of available templates.
     2. Click the desired template and click Apply. The template is added to the text field.
3. Type in your note or any additional information and click Reply. The reply is added to the Activity pane.

Text Analytics

About Text Analytics

ForeSee® Text Analytics is designed for those with Consumer Insight interests and enables them to analyze unstructured text, extract insights, and derive actionable business intelligence.

Text Analytics are generated from Open Ends to identify the most commonly used nouns or topics among respondents. This allows a thorough analysis of what respondents are communicating without having to read each response.

Text Analytics uses a variety of displays to show data on positive, neutral, and negative sentiment in respondent comments. This allows you to identify both strengths and weaknesses of your offerings with direct communication from respondents.

The data presented in Text Analytics can be filtered in a variety of ways including date range and sentiment.

Text Analytics is a subscription service. If you do not have access to Text Analytics and would like to, contact your ForeSee Account Manager for pricing and contract information.

Taxonomy

A taxonomy is a collection of high level themes and topics. Text Analytics offers pre-built taxonomies for retail, financial services, and government industries, in addition to a general taxonomy. Once the open end data has been processed, it is categorized according to the selected taxonomy with the results displayed in the Topics dashboard. The basic hierarchy structure of the taxonomy is High-Level Themes > Mid-Level Themes > Topics, e.g., Rewards or Coupons > Usage > Redeem Points. This allows an analysis of how many comments pertain to Rewards or Coupons. You can click on the Topic name to view how many comments pertain to Usage, or any other mid level theme associated with Rewards or Coupons. You can drill down even further by clicking the Topic name again to see the number of comments concerning the redeeming of points. The following table is based on the Retail Taxonomy:

| High-Level Theme | Comments | Mid-Level Theme | Comments | Topic | Comments |
| --- | --- | --- | --- | --- | --- |
|  | 1540 | Rewards and Coupons | 98 | Add Redeemable Products | 98 |
|  |  | Earn | 485 | Points/Coupons | 302 |
|  |  |  |  | Registration | 10 |
|  |  |  |  | Requesting More | 173 |
|  |  | Other | 17 | Lost Points | 8 |
|  |  |  |  | Redeemable Products Out Of Stock | 9 |
|  |  | Usage | 940 | Printing Coupons | 86 |
|  |  |  |  | Processing Codes | 414 |
|  |  |  |  | Donate Points | 17 |
|  |  |  |  | Redeem Points | 423 |

The following table contains a summary of currently available taxonomies:

| Taxonomy | High-Level Themes | Mid-Level Themes | Topics |
| --- | --- | --- | --- |
| Retail | 17 | 40 | 89 |
| Government | 13 | 30 | 224 |
| Financial Services | 13 | 28 | 121 |
| General Other | 18 | 55 | 163 |

Analyzing Data

When you configure Text Analytics to be applied to certain surveys and questions, the Text Analytics engine processes the comments and the Text Analytics insights are available in the dashboard for review.

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| Note: If you are a new user to Text Analytics, no data is available to review in the dashboard unless you have selected the measure and questions for analysis in the Settings tab. |

The Text Analytics section of CX Suite consists of the Topics and Keywords dashboards, and offers a filter ribbon containing the following features:

* Measure Menu - Click the displayed measure to open a menu of available measures to select from.
* Question Menu - By default, all questions are included. This menu allows you to include or exclude specific question responses.
* Date Picker - Click on the date range to display the Date Picker. The Date Picker offers the following options for limiting data to a specific range of dates:
  + A list of preset date ranges along the left side which you can select to implement. When you click on a range the Date Picker closes and the screen refreshes to display data within the selected dates.
  + Start Date and End Date text fields where you can type in the desired dates. When you enter the start and end dates the screen refreshes to display data within those dates.
  + A calendar displaying the current and previous month and the current date range highlighted. Click the start and end dates to set the range. Use the single arrows (< and >) to scroll one month at a time. Use the double arrows (<< and >>) to scroll one year at a time. When you select the start and end dates the screen refreshes to display data within those dates and the Start Date and End Date fields are updated.

Click Apply Date Range to close. The page refreshes to display data from the selected date range.

* Survey Filter - Click Add a Filter to display a list of preset filters or switch to your saved filters. These filters allow you to select specific questions and answer options of the current survey, which is displayed to the left of the Date Picker. Each selected filter displays below the secondary bar. You can apply multiple filters as desired and save the combination of filters as a new filter.

Topics

The Topics dashboard displays taxonomy data on the following cards:

* Topics Overview - A horizontal bar chart showing the top five positive and negative topics for the selected date range.
* Topic Trend - A vertical bar chart showing sentiment distribution for each day of the selected date range. Mouse over each bar to see total number of comments for the day and a breakdown of positive, negative, and neutral sentiment. By default, data from all topics are included. The menu in the upper-right corner of the card allows you to focus on a selected topic.
* Topic and Comments - The data on this card is divided into two tabs:
  + Topics - A list of [High-Level Themes](#1677823182) displays with a horizontal bar showing three sentiment levels, the number of comments, overall sentiment, and overall satisfaction. Click a High-Level Theme name to display the associated Mid-Level Themes. Each Mid-Level Theme may also be clicked to display the Topics associated with the theme. At any point in the drill-down, you can click to display the Comments tab and view all comments associated with either the High-Level Theme, Mid-Level Theme, or Topic.
  + Comments - A list of open end responses to the displayed question. This list contains the comment itself, the date which the comment was submitted, the Sentiment of the comment, and the overall Satisfaction Score given by the respondent. Data may be sorted by clicking the column heading.

Keywords

The Keywords dashboard displays data on the following cards:

* Keyword Wordcloud - Displays the most commonly used words in size proportion of frequency and color coded according to the overall sentiment of the open ends each word is used. For example, if several respondents are reporting an issue where they clicked on a link and nothing happened, you might see the word "click" appearing in red and in a larger size.

This card offers two types of displays, Wordcloud and Treemap, as well as buttons for the number of words to display.

* Top Keywords - A bar chart of the top 10 words during the selected time span, showing the amount of positive, neutral, and negative statements in which the word was used. This card typically displays top 10 frequently occurring words/topics, with the exception of a search term that is not in top 10. When a search is applied to show a specific word, this word is included in the chart regardless of its frequency.

Hover over each bar to view the breakdown of positive, neutral, and negative occurrences.

* Comments - A list of open end responses to the displayed question. This list contains the overall Satisfaction Score given by the respondent, the Sentiment of the comment, the comment itself, and the date which the comment was submitted.

The header of the comment column contains a menu of all open end questions and can be used to display results from each of these questions. Click on any of the column headers to sort the comments according to the clicked column.

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| Notifications |

Set up notifications for each project to be alerted to selected scenarios, such as a drop or increase in four-star ratings.

The Notifications page is comprised of a list of alert projects and properties, along with the following functions:

* Status - Toggles to turn the alert on or off.
* - Edit this alert.



* - Delete this alert.



Create or Edit a Notification

The following process is for creating a new alert. However, the process is very similar for revising an existing alert.

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| Note: During the Create process, the Warning icon () displays to indicate insufficient Trigger Events criteria and/or Publish information. The Valid icon () displays to indicate the alert is ready for use. |

1. Open the notification builder:
   * For a new project, click Create a Notification.
   * For editing an existing project, click the name or Edit icon ().



The notifications builder displays with a default title, description, Trigger Events card (expanded), and Configure Email card (collapsed).

1. Click the default title and description text to add an identifiable name and brief narration of the project.
2. On the Trigger Events card, select the desired project name from the Choose Feedback Project menu. The Choose Criteria menu displays.
3. Select the desired criteria.

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| Example: Star Rating = 5 Stars - A notification is triggered when a respondent enters a five star rating in the survey. Topic = Technical Issue - A notification is triggered when a respondent reports a possible problem with the web page. |

1. Optionally, you can click Add criteria to add another layer to the notification trigger.

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| Example: Topic = Technical Issue + Star Rating = 1 Star |

1. When you are finished adding criteria, click Configure Email. The Trigger Events card collapses and the Configure Email card expands.
2. Type the Subject and Email Body of the note. It is recommended to include some reference to the Notification Name and/or Trigger Events criteria to ensure the recipient understands the reason for the email.
3. In the Email To text box, type the email address(es) of the notification recipient(s). Separate multiple addresses with a comma. The Save button is enabled.
4. Click Save. The Notifications tab displays with the new alert listed with an active status.

Integration

ForeSee® Public API

The ForeSee® Public API enables you to programmatically access your ForeSee data using a secure, direct connection. This connection provides access to both respondent and aggregate level data. Application Program Interface (API) is a simple, flexible way to connect and pull Voice of Customer data. You have the flexibility to make API calls as frequently as you like, and get data for range of time, as well as incorporate this data pull in your IT processes.

The data is provided in JSON format, which is easy to extract and provides the freedom to use the data in a way that best fits your needs.

The ForeSee® Developer Portal details the API, including information for all API endpoints, call parameters, return data examples, and sample code snippets. The ForeSee® Developer Portal can be accessed publicly here: <http://developer.foresee.com/docs-articles/public-api/>

In order to use the ForeSee® API, you need API specific credentials from ForeSee. You may work with your ForeSee contact or reach out to [ForeSee® Support](http://support.foresee.com/contact) for help with obtaining API credentials.

Once you have access to the API, it is recommended to review ForeSee’s documentation, which includes code samples that have proven to be beneficial to many of our clients. These code samples are in several programming languages to provide an understanding of the syntax used in the ForeSee® API.

If you experience API connection issues while developing your code to connect to the ForeSee® API, please provide the specific steps taken and any error or response message that results.

Integration - Respondent Level

About Respondent Level Integration

Forward thinking organizations need to see how their customers’ experiences are impacting sales and ultimately shaping their business. ForeSee® Web Analytics Integration - Respondent-Level can load information from various business systems into ForeSee adding context for decision making and providing a comparative format for detailed analysis. Deep, segmentation-level analysis can be performed to help guide strategies within specific customer segments, audience profiles, etc.

Benefits of Web Analytics Integration

* The ability to see satisfaction data for segments generated from within their clickstream data in the form of ForeSee automated reports.
* The ability to perform segmentation within the portal on clickstream behavioral data that has been passed back to ForeSee.
* The ability to segment behavioral data within SiteCatalyst based on attitudinal data passed from ForeSee.

Passing Data

Requirements For Passing Data To ForeSee: Data File Requirements

* The file must have column headers.
* Delimited files (CSV, TSV, Pipe, or any other delimited format) with associated header record.
* Any dates supplied in MM/DD/YYYY or M/D/YYYY H:MM format.
* One row per respondent.
* ForeSee respondent ID required as a data point in each row.
* In most cases, Adobe (Omniture) or Google (UA) integrations are accommodated through an API those companies provide. When using this API, data file transfers are not necessary to deliver our data to Adobe or Google. However, if a client wants to pass Adobe or Google data back to us, a data file transfer is necessary.

Passing Data To ForeSee: SFTP Information

* ForeSee establishes an ID, Password, and directories to the SFTP host. A client-supplied SFTP can be used as well.
* ForeSee also has the capability to provide Public Key Authentication.
* Encryption with Open PGP and GnuPG (GPG) is supported provided the ForeSee encryption key is used.

Passing Data To ForeSee: EXDL Information

External Data Load (EXDL) is a process used to load data into the ForeSee database:

* A custom EXDL is generated for each data feed.
* The process monitors the SFTP folder and automatically imports new files.
* Imported data appears in the Portal the following day.

Passing Data To ForeSee: Hidden Custom Questions Information

* Hidden custom questions are simply the containers for the imported data. Respondents do not see these questions on their surveys.
* Every incoming column of data is mapped to a corresponding hidden custom question.

Passing Data From ForeSee

* Data is in tab delimited files of Text (.txt), Comma Separated Values (.csv), or Excel (.xlsx) format.
* One zip file per measure. The zip file contains three files:
  + Data file - Respondent data from the survey.
  + Question Mapping File - Question details including mapping.
  + Answer Mapping File - Answer details including mapping.
* Delivery options include:
  + Email: Zip file attachment sent to email recipient.
  + Posted for Pickup: Posted to ForeSee® Portal workspace area for client retrieval.
  + FTP (ForeSee): File available for retrieval on ForeSee® SFTP site.
  + FTP (Client): File sent to client SFTP site.

Google Universal Analytics Integration Information

Google (Universal) Analytics integration allows ForeSee to use an Application Programming Interface (API) to retrieve Google Universal Analytics’ "dimensions & metrics" information from your Google account and append this data to your existing respondent data.

Web analytics data flow with Google Analytics is uni-directional. Google web analytics data can be imported into ForeSee, and viewed within the ForeSee portal.

Adobe Marketing Cloud Integration Information

Adobe Marketing Cloud integration gives the ability to connect your ForeSee survey data with web analytics data from Omniture or Adobe Marketing Cloud.

Adobe integration accommodates two-way data flow:

* Adobe web analytics data can be brought into the ForeSee® Portal.
* ForeSee survey data can be brought into Adobe Analytics Reporting.

CPPs/EPPs

Customer Passed Parameters (CPPs) and External Passed Parameters (EPPs) are primarily used by clients to segment data within the Portal for an increased level of granularity. Analysts can also use them to increase the relevance of their Satisfaction Insight Reviews (SIRs).

CPP - A Customer Passed Parameter is a data point created by, or currently available from, the client that is captured at the time of survey submission. CPPs can typically be captured with either a variable, cookie, or a URL string that is accessible while the ForeSee code is running. Click [here](https://developer.foresee.com/docs/default-cpps) for additional information and to view a list of Default CPPs.

EPP - An External Passed Parameter is a data point provided by an external file. Data fields are sent in a separate data file, are matched up by the client and then loaded to the portal or appended by IS.

Deployment Types That Can Capture CPPs

* [Trigger Code](#_Ref-1475923298" \o "[%=Tooltips.Tooltip Topic%])
  + Hosted Code
  + Legacy Code
* [SDK](#_Ref-174191949)
* Static Link
  + Email link
  + Site Feedback link (either with or without code on the site)
  + Social Media Link
  + Physical link (vanity URL) on store signage/receipt
* [IVR/IVA](#_Ref-301810272) (for both Store and Contact Center measures)
* [Panel Studies](#_Ref-1459021975)

Once a survey is presented, the CPPs no longer updates. So, if a user receives a survey in session or prematurely during onExit, we do not collect CPPs after they have left the survey.

Passing CPPs Through An Intercept Survey

CPPs can be sent with the survey. This passing happens at the time of survey submission.

We have the ability within our code to set any CPP with a default value. This allows us to set the default value for a given event on the site you wish to measure, until it is changed to another value which indicates an action has been taken.

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| Example:   * Logged in verses not logged in (default) * Added to cart verses nothing added to cart (default) |

The client can send as many CPPs as they would like to us, though the more CPPs they pass, the larger the session level cookie is, as this data is stored in the cookie until the survey is presented.

Passing CPPs With The URL API

The term "URL API" can be thought of as being synonymous with the term "Survey Link", or the link used in emails and Site Feedback.

If the URL survey link is being used for email or where NO code is running on the site, then only the following default CPPs can be collected at the time of survey submission.

* sid
* survey\_time
* survey\_submits

If the URL survey link is being used for Site Feedback where code is running on the site, then we can capture a larger list of CPPs than the three mentioned above. You can find this list of CPPs [here](https://fsrwiki.foreseeresults.com/display/IS/Survey-Link-SiteFeedback).

Clients can pass additional CPPs beyond the default mentioned above when using the URL API by adding them to the URL string.

* There is a limit of 2056 characters for the total URL string.
* Multiple CPPs within the URL string must be delimited by an ampersand (&):

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| Example: http://survey.foreseeresults.com/survey/display?cid=8NNxB5BIVJdMBEBUBJ1Fpg==&sid=link&cpp[custid]=1234 |

* The API syntax follows a name/value assignment formula, which can be seen in the above URL string also

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| Example: &cpp[name]=value) |

How To Pass EPPs

The client must send us a file with the Foresee respondent id or email id. This can be done in the following ways:

* In the case of integration, the client has this information from the thank you page "handshake".
* In other cases, the client may get a custom extract from the analyst, append the data needed in additional columns then send it back to us via the SFTP site.
* Another way to append data is to use a unique identifier that the client is capturing as a CPP to match the data to a respondent.

The client data is delivered to ForeSee through the use of SFTP.

The data file that is sent to ForeSee can be the following formats:

* .csv
* .tsv
* Delimited .txt
* .sql

The file that is sent to us must have column headers, the column order must not change, any additional columns added after the first load must be added as the last column, and we can only have one file per measurement.

Data that is sent to us appears in the Portal the following day.

How does the data/variables they are sending us get matched up to the correct respondent in the portal? Is this done through a specific variable?

Global Settings

About Global Settings

The Global Settings feature is available from the [User Menu](file:///C:\Users\kevin.beauman\Documents\Content\using.htm) to provide quick access to your controls and the latest version of the [ForeSee® Cloud Deployment](#_Ref1560907512). Access to Global Settings is limited and managed by [ForeSee Support](http://support.foresee.com/contact).

When you click Global Settings on the User Menu, a separate section displays with the following tabs:

Some Global Settings tabs offer a navigation pane on the left to display settings for a specific application or purpose.

Setup

Hierarchy

About Hierarchy

The Hierarchy feature of CX Suite allows you to implement your organization's structure for filtering data each level. Go to [Global Settings](#_Ref-1150906778) > Setup to manage your hierarchy versions. The left navigation pane offers the following links:

* Hierarchy - Displays the Hierarchy Management page for viewing the latest hierarchy versions and uploading a Comma Separated Values (CSV) file to create a new version. See Create a Hierarchy for additional information on uploading a CSV file.
* Master Data - Displays the Master Data Management page for viewing and editing the data that comprises each hierarchy version.

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| Note: You must have Administrator Access to view and edit these pages. |

Hierarchy

The Hierarchy Management page lists all your hierarchies with Version, Status, and Last Updated information. Below the list is Pending Uploads, which displays hierarchies that have been initially loaded but not completed the two-step process of identifying columns. Once this wizard is complete, the status is set to Draft to allow review and the setting of Roles & Permissions before being published.

To view an existing hierarchy version, click Hierarchy on the left navigation pane and click the name of the desired hierarchy. The Details tab of the hierarchy displays by default with a tree view with all parent nodes expanded. Click a parent node to collapse or expand the child nodes. You may also use the Search text box to automatically scroll to a specific node.

Upload allows you to select a revised version of the hierarchy in a CVS file and upload into the system. Once the file is uploaded, follow the [Create a Hierarchy](#_Ref-19611478) instructions to complete the process.

The Versions tab list the hierarchy current in production, with Past Versions (a history of published revisions) of the hierarchy below. The Drafts tab list the versions, or revisions, of the hierarchy that have not been published. Below, the Pending Uploads pane shows drafts awaiting final review and publication. Click on a version name to display a tree view of the hierarchy.

Master Data

The Master Data Management page allows you to access the data that comprises your hierarchies. The page displays a tile for each hierarchy type currently in production with a View and Edit link in each tile. You can perform minor revisions to a current hierarchy version, such as changing a store name or adding a single entry:

1. Click Edit in the tile of hierarchy type to be revised. The data displays in a table form on the Records tab by default. The Attributes tab contains the column headings from your CSV file, and may also be revised.
2. Click the desired record. A form containing the record data displays, which may be edited.
3. Click Save to complete the revision. The Records tab displays to show your revision.

Create a Hierarchy

1. Go to [Global Settings](#_Ref-1143582052) > Set Up > Hierarchy. The Hierarchy Management page displays.
2. Click Set Up a New Hierarchy. The Set Up Hierarchy page displays with the initial steps for creating a new hierarchy version along with a hierarchy file example and template that you can download.
3. In Hierarchy Name, type a descriptive label for the new version that helps identify the hierarchy's purpose and application.
4. Click a Hierarchy Type tile:
   * Location - Intended for retail, franchise, or distribution type organizations using store measures, such as Online Pickup/Buy Online or Pickup Instore. An example of a Location Hierarchy is: Region > District > Store.
   * Employees - Intended for organizations using the [Employee Satisfaction](#_Ref1308049604) measure. An example of an Employee Hierarchy is: COs > Managers > Team Leads > Laborers.
   * Agents - Intended for organizations using [Contact Center](#_Ref1226962925) measure or [Case Management](#_Ref1612674945). An example of an Agents Hierarchy is: Zone > Call Center > Operator.

The selection is enabled and displays a green check mark.

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| Note: If you have an existing hierarchy, even in Draft, the corresponding Hierarchy Type does not display. |

1. Click Browse Files to select and upload a Comma Separated Values (CSV) file. Next becomes enabled. If you need to prepare a CSV file, click either View Example or Download Template for assistance in developing a valid file. See [Hierarchy Attributes](#_Ref-1723836775) for information on how to prepare a valid file.
2. Click Next. A wizard displays when processing of the file is complete.

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| Note: If you find there is a problem with your CSV file and need to make revisions, a link is available along the bottom of the wizard to upload a new file. |

1. Key Selection - Each value in the top row of your CSV file is available in the Column menus of the required and suggested keys. Currently, spaces are not allowed in column headings, so you may choose to revise the Display Name of the selected column or accept the default value. Data Preview displays the first few rows of data in the selected column as a reference. See [Hierarchy Attributes](#_Ref-1723836775) for detailed descriptions of these settings. Next becomes enabled when you complete the required and suggested assignments.
2. Click Next. The Master Data Set Up section displays with any remaining optional attributes that have not been assigned. Upload is enabled once you have check and revised all columns.
3. Click Upload. A visual of the hierarchy tree displays for your review.
4. Click Publish. A dialog box displays to inform you that the new hierarchy is ready to use and reminds you to notify your ForeSee analyst as any hierarchy change impacts any analysis they may be doing for your organization. This box also allows you to go to Associations where you can [associate the hierarchy](#_Ref-877101173) to a hierarchy-enabled [CX Measurement](#_Ref1852079564) or [Case Management](#_Ref1612674945).

Associate a Hierarchy

You can associate a hierarchy to either [Case Management](#_Ref1612674945), as well as one or more hierarchy-enabled [CX Measurements](#_Ref1852079564).

1. Go to [Global Settings](#_Ref-1150906778) > Setup > Hierarchy.
2. Click the desired hierarchy name. The Details tab displays.
3. Click Settings. App Associations displays.
4. Click on the desired application. A dialog displays.
5. To associate a hierarchy to...
   1. Case Management - Click the Off/On toggle to the On position.
   2. CX Measurement - Select the desired active measure(s).
6. Click Save. The dialog closes and the hierarchy is now associated to the application.

Hierarchy Attributes

Hierarchy Attributes are characteristics of each line item, such as a name, location, or identifier. You may have up to 15 attributes in a new hierarchy. Each attribute may contain up to 100 text characters (including spaces).

CX Suite allows you to upload a Comma Separated Values (CSV) file to [create a new hierarchy](#_Ref-19611478). You can create a CSV file using a spreadsheet program such as Microsoft Excel.

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| Note: When using Excel, date cells must be formatted as text. |

When you upload the file, CX Suite converts each column of the spreadsheet into a hierarchy attribute. The following list contains required attributes as they appear when [creating a hierarchy](#_Ref-19611478) and makes reference to the example that follows. Keep in mind that revisions to a Master Data record should also be made to the corresponding CSV file to avoid an overwriting of the changes in the event that the CSV file is uploaded again.

* ID - Select the column containing a unique identifier for each member, or record of the hierarchy, such as an Employee Number. This allows you to associate parent and child values (or supervisor and subordinate) in the proceeding steps. In the example below, Liam's Employee Number is 22 and he reports to Carrie (11). Therefore you would select the E No column as the ID. For a Store Hierarchy, the ID column might contain chain, zone, region, and store numbers.

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| Hint: For IDs with leading zeros, be sure to format the column accordingly. For example: in Excel, select the column, right-click and select Format Cells from the context menu. Then go to the Number tab and click Custom. Finally, in the Type field enter zeros to represent the required format. |

Click the Forward icon (>) to advance to Name.

* Name - This value displays in the CX Suite Hierarchy menu for the user to select when filtering data. Select the column containing a label of each element in the hierarchy tree.
* Level - This label identifies a group of Name values and also appears on the CX Suite Hierarchy menu, e.g., Liam, Dan, Stockton, and Manny would display at the Staff level of the CX Suite Hierarchy menu. Select the column that contains this type of values.
* Parent ID - Relates to the direct reporting level of each hierarchy member (see the example for ID).
* Email - Use this column for associating an email address to the hierarchy member. You can set up automatic permissions based on values in this column, or the values may be blank.
* Start Date - An optional column for associating a beginning date for the member. Requires either YYYY-MM-DD or YYYY-MM-DD'T'HH:MM'Z.
* End Date - An optional column for associating a date on which the member became, or becomes inactive. Example: Carrie is scheduled to take a leave of absence starting December 23 and Gary is scheduled to retire on March 1.
* Version Effective Date - The current date is the default. This is the date on which the record was last updated. Click Next when these fields are complete.
* Additional Mater Data Attributes - When your file contains columns other than the preceding required and suggested columns, these columns display as for you to revise the Display Name and select the Data Type. Click Next when these fields are complete.

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| Example: Consider the following CSV file for illustration purposes (displayed in table format for clarity):   |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | E\_No | Name | Level | Spr | Email | Start\_Date | End\_Date | | 1 | Janet | Executives |  | janet@foresee.com | 1999-03-12 |  | | 5 | Dillon | Management | 1 | dillon@foresee.com | 2003-08-07 |  | | 11 | Carrie | Management | 1 | carrie@foresee.com | 2007-06-29 | 2017-12-23 | | 7 | Gary | Director | 1 | gary@foresee.com | 2004-02-13 | 2018-03-01 | | 22 | Liam | Staff | 11 | liam@foresee.com | 2016-01-10 |  | | 9 | Dan | Staff | 5 | dan@foresee.com | 2004-04-02 |  | | 12 | Stockton | Staff | 11 | stockton@foresee.com | 2007-11-07 |  | | 20 | Manny | Staff | 5 | manny@foresee.com | 2016-04-28 |  |   Results: |

About Hierarchy Versions

Each time the data or attributes of a hierarchy are revised, CX Suite creates a new Version and maintains a copy of the data prior to the revision. Each version is available for review from the Hierarchy Management page in [Global Settings](#_Ref-1150906778). Click the hierarchy name to display the Versions tab for the hierarchy. The Version tab displays the Current Version and lists Past Versions below. Click the version name to display the hierarchy tree.

Hierarchy Error Messages

| Error Message | Description |
| --- | --- |
| Column Missing (not required) | This is a warning and does not require a revision unless the missing column is still needed. This warning occurs when an existing hierarchy is updated with a file that does not contain one or more of the optional columns in the existing hierarchy. |
| Duplicate entries found | A member exists in the CSV file more than once. To fix the error, sort the CSV file by the ID column and review for duplicate members. |
| Empty entries found | Specific information is missing from a required field. To fix the error, review the file for any blank cells in required columns, which are described in the [Hierarchy Attributes](#_Ref-1723836775) topic. |
| Format Syntax Error | The specified rows are not formatted correctly (e.g., not valid email address format, ID format is incorrect, the date format is not YYYY-MM-DD, etc.). To fix the error, check the identified rows and fix the format as needed. See [Hierarchy Attributes](#_Ref-1723836775) for information on formatting data. |
| Incorrect format found | The file format must be Comma Separated Values (CSV). To fix the error, save the file as a CSV file. If your data contains leading zeros, verify the zeros still exist once the file is saved as a CSV file. |
| Invalid Header Format | The column header has a specific format (must begin with a letter and can only contain letters, numbers, ampersand, and underscore). To fix this error, check all the column headers within the file and revise as needed. |
| Invalid Parent | For a specific member(s), a Parent ID is listed that is not part of the ID column. To fix the error, check the specific rows within the file and make sure the Parent ID is valid and part of the ID column. |
| Invalid Root | There are more than one blank cell within the Parent ID column. There can only be one blank cell within this column, which is the topmost level of your organization and does not have a parent). To fix this error, check the Parent ID column for more than one blank cell and revise as needed. |
| Missing columns | This can be either a warning or an error. If an optional column exists in the hierarchy but is missing from an update file, it is a warning. If it is a required column, this is an error. To fix the error, add the required column(s) back. |
| Missing Required Data | The specified rows are missing required information. To fix the error, check the file and add the required information as needed. |
| Ragged Hierarchy | Currently, the hierarchy file must be balanced which means that all members within all the levels must follow the same lineage (e.g. all agents roll up to a team lead, all team leads roll up to a manager, etc.). |
| State Date Column Includes Future Date | If the Start Date column is chosen, the date cannot be in the future. To fix the error, the Start Date must be revised to a date in the past or today’s date. |
| Start Date(s) After End Date(s) | If the Start Date and End Date columns are chosen, the Start Date cannot be after End Date. To fix the error, any Start Date value(s) greater than, or after the corresponding End Date must be revised to a date which occurs before the End Date. |
| Timed Out | You may have been inactive for some time so your session has timed out. To fix this error, restart the hierarchy load process. |
| Unknown Error | This is a general error that may require help from ForeSee Support. First check your file for general errors as well as try to reload it once more. If you receive the error again, please contact [ForeSee Support](http://support.foresee.com/contact). |
| Version Effective in the Future | If the Version Effective column is chosen, the date cannot be in the future. To fix the error, the Effective date must be revised to a date in the past or today’s date. |

Master Data

Master Data is a repository of your association's records where you can add or edit records, as well as manage the attributes of these records.

Add/Edit Records

When you [upload a hierarchy file](#_Ref-19611478), the data is available in the Master Data section of [Global Settings](#_Ref-1150906778). You can also add a single record:

1. Go to [Global Settings](#_Ref-1150906778) > Setup > Master Data. Currently, three data types are supported: Locations, Employees, and Agents.
2. Click the desired data type. The Records display for the selected data type, along with the Attributes on a separate tab.
3. Add or Edit:
   * Add - Click Add New Master Data Entry. A blank form displays with the current attributes. See [Hierarchy Attributes](#_Ref-1723836775) for information on entering these attributes.
   * Edit - Click the desired record. The record data displays in a form for editing.
4. Click Save to complete the process and return to the Records tab.

Add/Edit Attributes

1. Go to [Global Settings](#_Ref-1150906778) > Setup > Master Data. Currently, three data types are supported: Locations, Employees, and Agents.
2. Click the desired data type. The Records display for the selected data type, along with the Attributes on a separate tab.
3. Click the Attributes tab. The Required and Additional attributes display.
4. Add or Edit:
   * Add - Click Add New Attribute. A blank form displays to enter a Name, Key, and Data Type. See [Hierarchy Attributes](#_Ref-1723836775) for information on attributes.
   * Edit - Click the desired attribute name or Edit icon (). The attribute data displays in a form for editing.



1. Click Save to complete the process and return to the Records tab.

Apps

Replay

ForeSee® Replay

ForeSee® Replay is a video recording of a survey respondent's visit to your web site, with some features and functionality to help in the analysis of the session. These recordings are available on the See Respondents tab of your [Surveys](#_Ref-1827995700) dashboard, where you can click the Replay icon () to launch.



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| Note: You can copy the page Uniform Resource Locator (URL) of the Respondent Details page to share the recording with another CX Suite user, who must be logged in before pasting the URL into their web browser. |

Replay presents an added perspective on a survey respondent's experience and often highlights trouble spots where visitors are consistently experiencing issues with the site. With Replay, you can visually compare the mouse clicks or touches, mouse movement, and page scrolling of an individual session to that of the usage pattern for all sessions.

When a site visitor completes a survey, a recording of their interaction with the web site is transferred to ForeSee's database. In cases such as Feedback, where the survey is completed before the end of the visit or session, the recording is transferred when the respondent leaves the site.

You can omit one or more pages of your web site from being record by entering the page address in the Do not monitor the following page URLs text box on the Site Settings tab in Global Settings. See [Replay Settings](#_Ref-1962531269) for more information. You may also omit specific portions of a pages that may display Personal Identity Information (PII) with the Custom PII Masking feature. See [ForeSee® Replay Security](#_Ref1445924581) for more information.

Replay uses the Web Based Player to display these recordings, which offers a number of display options and tools to help with the analysis of the respondent's session. See [Web Based Player](#_Ref1684505488) for more information.

Recordings are stored for a period of 15 months, at which time the files are purged from the database and are no longer available.

Replay Settings

1. Go to the [User Menu](#55141917) and click Global Settings. The Global Settings page displays.
2. In the left pane, click Settings under Replay. The Replay Settings page displays, defaulting to Site Settings.
3. By default, the project is turned off and must be turned on. Click the Tracking Is toggle switch to ON. The Save button become enabled.
4. (Optional) You may prevent the recording of select pages by clicking Do not monitor the following page URLs and entering the web page addresses of those pages.

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| Example: You may have no desire to record a user's interaction with a page of text, such as policies, case studies, or instructions. You can suspend the recording of these pages by adding the URLs to the Black List. |

1. Click Save. The Save button becomes disabled.
2. (Optional) Click Advanced Settings in the progress bar. The Manage JSON page displays.

The Manage JSON page is intended for users with advanced programming knowledge to enable the masking of select user interface elements that may contain Personal Identity Information (PII). Type in the desired user interface elements under "pii": {. See [ForeSee® Replay Security](#_Ref1445924581) for additional information on PII masking.

1. Click Publishing. The Publishing page displays.
2. Click the Publish button in Step 1. Even if there is no staging environment (server), this is a necessary first step. When the process completes, the Publish button in Step 2 is enabled.
3. Select all syntax in the Staging Embed Snippet pane and paste the syntax into the <header> section of each web page in Staging to test the survey settings.
4. Once testing is complete, click Publish to Production. When the process completes, a time stamp displays and Publish to Production becomes disabled.

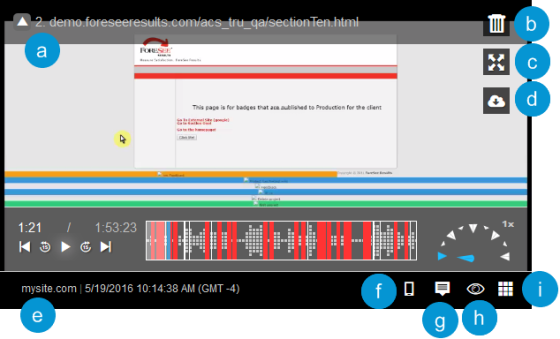
Web Based Player

The Web Based Player is the primary interface for viewing ForeSee® Replays.

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| Note: You can copy the page Uniform Resource Locator (URL) of the Respondent Details page to share the recording with another CX Suite user, who must be logged in before pasting the URL into their web browser. |

The player consists of two primary types of controls:

1. The basic Session Controls provide the following functions:

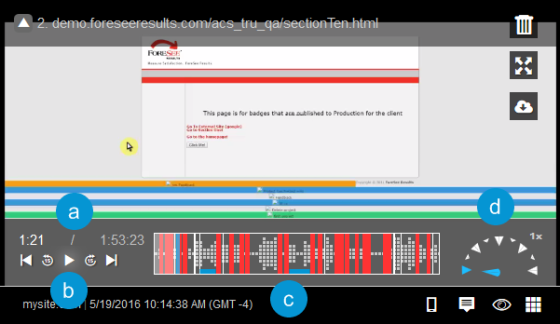


* 1. Page number and page title - This line may be expanded to show the full URL. The page number refers to the sequence of pages viewed by the respondent which are listed in the Page Selector. When a page title is not available, the URL is displayed.
  2. Delete Recording - Users with administrator permissions may delete a recording, as well as the entire response entry.
  3. Full Screen/Restore - Expand the replay session to full screen. When in Full Screen mode, this control toggles to Restore to the original size.
  4. Download - Export the video file to your hard drive.
  5. Home page, date, and time-stamp of the session -These features are disabled and do not display in full-screen mode.
  6. Device Information - Device Information displays key facts about the device type (e.g., Personal Computer, Tablet, or Mobile Phone Handset), the browser (e.g., Safari, Internet Explorer, or Chrome), and the physical orientation of the device (e.g., landscape or portrait) as it changes while the user interacts with the website (if the device is capable of providing this information). The orientation and movement of the device is captured during user interaction, which can be viewed during a session replay.
  7. Annotations – A text field to allow reviewers to leave comments for other viewers. The Annotation feature allows you to input comments or observations about a given replay for future reference, and for sharing with other users who review the replays. The input function is a simple note taking feature which allows any free form comments that are relevant. A blue bar displays along the bottom of the Histogram to indicate the annotation. A best practice is for each user to leave their initials, date of the comment, and a reference point in the replay where the comment applies to.

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| Example: FS 05/20/2016 @1:15 User does something... |

* 1. Heatmaps - The Heatmap allows you to see the most active areas of the screen across multiple user interactions, providing insight on the ease of use and engaging content display of the page. Click, Page Scroll, and Mouse Movement Heatmaps are available for Personal Computer based interactions. Additionally, you can include URL Parameters and/or Respondent Filters. Touch and Page Scroll Heatmaps are available for mobile device interactions. See [Heat Maps](#_Ref2101478822) for more information.
  2. Page Selector – The ability to move to any page within a given session by selecting a thumbnail. The Page Selector feature is a control that allows you to see all pages involved in a given replay. This function provides an interactive thumbnail view of each page which allows you to navigate directly to that point in the replay.The page number being viewed displays with the page title along the top of the player.

1. The Session Histogram overlay contains standard media player controls which allow the full motion of the replay to be managed.



* 1. Time Elapsed and Total viewing time.
  2. Page Back, Back 15, Play/Pause (toggle), Forward 15, and Page Forward - These controls allow you to go to the beginning of the page which the respondent visited prior to the displayed page, jump back 15 seconds, play or pause the replay, jump forward 15 seconds, and go to the beginning of the next page visited.
  3. Histogram - Red vertical lines indicate inactivity which the player skips over. A blue horizontal line indicates an annotation. Click the Annotation icon to display.
  4. Replay Speed - Click the gauge to adjust the speed of the replay from actual time (1x) to twenty times the actual speed (20x).

Heat Maps

Usage patterns are represented in a Heatmap consisting of a colored indication of most intense/frequent (red) through least intense/frequent (blue). This displays as an overlay on the individual session so you can visually analyze individual sessions in context of other sessions.

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| Example: Using the Mouse Movement heat map to display color coded areas where movement is prevalent, you notice a visitor moves the mouse back and forth between two features. The Heatmap indicates that this behavior is common since the area between the two feature is red. You may decide to clarify the differences between the two in order to help visitors make their choice. Conversely, if the Heatmap does not identify this area as a hot spot, you may conclude that the individual's behavior is unique and decide the features need no additional clarification. |

More on Heat Maps

Heatmaps can be generated from the Heatmap tab of the [Web Based Player](#_Ref1684505488). The generation of the Heatmap is done on demand at the time of the request. As Heatmaps incorporate a specific set of users based on your date range, filter criteria or both it is important to note that generating a Heatmap can take several seconds to complete. All maps are generated off of actual interactions on each page and do not incorporate time into the mapping. The following types of Heatmaps are available:

* Clicks - This Heatmap is available for desktop devices to highlight the areas of a page, or pages, where the aggregate respondents have clicked on. The total number of respondents included in a Heatmap is displayed below the playback speed setting. Each map has a top end limit of 250 maximum respondents that are considered when generating the Heatmap. You can also show or hide the page URL during playback.
* Touches - This Heatmap is available for touch-screen devices only and defines where the aggregate respondents touches each page.
* Page Scroll - This Heatmap displays what part of a page was in view most frequently for the aggregate respondents. Each portion of the page that is in view during a given session is captured to generate the scroll map indicating the most viewed areas.
* Mouse Movement - This Heatmap is available for desktop devices to illustrate the mouse movement of the aggregate respondents on a given page. As the mouse travels across the page, the “X” and “Y” (up/down and side to side) is recorded to generate the heaviest travel pattern areas.

Heat Map Options

By default, all Heatmap types are based on all responses for the selected date range and any URL parameters are ignored, or truncated. You can apply URL parameters and any filters you may have in the left pane by selecting the following options:

* Include all URL parameters - Use the full URL parameter option to only generate Heatmaps that are of a specific page verses a higher level page or master template page.
* Include respondent filters - Generate a Heatmap based on Filters listed in the left pane.

ForeSee® Replay Security

The intended purpose of ForeSee® Replay video recordings is to illustrate an individual's interaction with a web page in order to identify problematic elements of the page. In doing so, it is impossible to omit or avoid the capture of sensitive information.

In order to protect the personal information of survey respondents, all text fields and other types of user input elements are rendered to an illegible state in the actual recording. To accomplish this, Replay uses a variety of methods to hide areas of the web pages where personal information might be entered. For example, text characters may be converted to all x's and profile images may be blurred. These changes take place in the browser of the respondent's device before the recording is transmitted to the database. This process cannot be reversed and the mask cannot be removed.

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| Note: When changes are made to the layout of a web page, thorough testing is required by the party performing these revisions to ensure all input elements continue to be masked. |

Some types of elements targeted for masking by default are:

* Text Fields
* User Name
* Profile Images
* Location
* Checkout Flows, i.e., what method a shopper uses to pay for their order.

Case Management

View and edit the templates used for internal emails, customer-facing emails, and other types of responses.

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| Note: All templates are implemented by ForeSee Support. Contact your ForeSee Professional Services representative to add a template to your Case Management account. |

1. Go to [Global Settings](#_Ref-1150906778) > Apps.
2. In the left navigation rail, click the desired type of template, e.g., Email & Templates. Thumbnail images display to represent each of your Case Management templates.
3. Click Edit for the desired template. The template displays for editing.
4. Revise the HTML syntax of the Body as desired. Click Body token cheat sheet to expand a list of code snippets that you can copy and paste as needed. Changes in Body are automatically displayed in the Preview pane.
5. Click Save. A confirmation message displays along the bottom of the screen and Save becomes disabled.
6. Click the Back arrow next to the template name to return to the templates page.

Text Analytics

Go to [Global Settings](#_Ref-1150906778) > Apps to view and manage your Custom Data Feeds and CX Data Feeds.

Custom Data Feeds

Utilize the Text Analytics engine to process data collected from alternative sources, such as social media or other vendors. The Custom Data Feeds page lists all of your uploaded files and the following information for each file:

* On/Off - Toggle to On for processing and Off to halt processing of automatic feeds from the [ForeSee® API](https://developer.foresee.com/docs/public-api).
* Feed ID - A unique, system generated numeric identifier.
* Feed Name - A user generated label to identify the type of data that exists in the file. Click the name to display the data, as well as edit the Feed Name and Description.
* Last Upload - A system generated timestamp of when the feed was last updated.

Add a Data Feed

1. On the Custom Data Feeds page, click Create New Feed. The Name Your New Feed page displays, which is the first of a three-step wizard.
2. Type an identifiable label for the feed in the Name field, and (optionally) a detailed narration of the feed in the Description field.
3. Click Next to advance the wizard to the Choose File Type page.
4. Click the Select This Option of the desired type of feed:
   * Upload a CSV - Your Comma Separated Values file must consist of text to be analyzed and date/time of when the text was collected. Additionally, the file may contain other information like the source, ratings, topic, etc. Click downloading our sample file template to view an example of a valid CSV file.

Enter the file path, or click Browse Files and select the desire CSV file.

* + Generate Feed ID (API) - The system displays a Feed ID to be used as a parameter to the Custom Feeds endpoint of the ForeSee® API.

1. Click Finish to close the wizard and return to the Custom Data Feeds page where your new data feed is listed.

You can manually update either type of data feed with a CSV file by clicking the name of the feed and clicking Upload New Data to Custom Feed.

CX Data Feeds

The CX Data Feeds page provides lists on separate tabs for Active and Inactive feeds. Click a Feed Name to display the feed questions, which you can toggle On and Off for feeding into the Text Analytics engine.

Integrate

ForeSee® Cloud Deployment

Starting with version 19.3.0, you can implement the ForeSee® Cloud Deployment to your own internal environments, such as a Staging or QA server. This offers you control over which version of the code resides in these environments and allows you to test new Cloud Deployment versions prior to going live. You may also roll back to a previous version when there might be conflicts with the new version and the various other elements within your site. See the [ForeSee® Cloud Deployment](https://developer.foresee.com/docs/cloud-deployment) page of the Developer Portal for additional information, updates, and instructions.

Go to [Global Settings](#_Ref-1150906778) > Integrate to see this page. If you have multiple site keys, a list of them displays along the left of the Settings page.

Settings on this page include:

* Get Installation Code - A dialog displays where you can click Copy to clipboard for each environment. This is a required step for each survey being published for the first time and does not need to be updated. See the [ForeSee Cloud Deployment - The Embed Snippet](https://developer.foresee.com/docs/cloud-deployment#section-the-embed-snippet) page of the Developer Portal for instructions.
* Code Version - The current code version is displayed on a menu of Cloud Deployment Versions where you can select the version that works best with your survey and site:
  1. Select the desired version from the menu.
  2. Click Save Changes. The selected code version is implemented to your Staging environment for testing.
  3. Once testing is complete, click Copy Staging to Production. The code version is implemented to your Production environment.
* Always keep environment on latest version - This option eliminates the need to manually update your code version. Any publishing change, such as updating a Feedback survey or Replay project, automatically brings the production environment to the latest code version.
* Product(s) Installed - Select, or clear the check box for each CX Suite product to enable or disable, i.e., turn on or off, the application(s) in either Staging or Production.
* Deferred Loading - Select this to delay the Web SDK from loading until the window onload even.
* Advanced Settings - A menu of user tracking options including Cookie based tracking, DOM storage tracking, Microcookie tracking, and Cookieless tracking. See [Web SDK - The ForeSee® Cookies](https://developer.foresee.com/docs/client-code-cookies) for additional information.

Glossary

Common Terms and Acronyms

2FA (Two Factor Authentication) - Rather than relying on a password alone, 2FA adds a second layer of security by requiring users to verify their identities using a second step to a login. Typical forms of 2FA are a security question with a preset answer, or texting a numeric token to the user's smartphone which they must type in to complete the login process.

3rd Party Cookie - A cookie is a small script file placed on the hard drive of your computer by the server of a website that you visit. The purpose of the file is to recognize your specific information about your visit in the event that you were to return to the same site. All cookies have an owner which tells who the cookie belongs to. The owner is the domain specified in the cookie, which is also the “party”. If the owner of the cookie is not the same as the domain you are visiting, then it is a third party cookie. ForeSee uses third party cookies, since we are the owner of the cookies but they are being used on our clients' website.

A/B Test - A method of comparing two versions of something against each other to determine which one performs better, using data and statistics to validate the decision. In the context of ForeSee, we have the ability to conduct A/B testing on our survey invitations to determine which variation will lead to higher acceptance rates, pending leadership approval. Additionally, clients may conduct A/B tests on different versions of product pages, home pages, etc. and use our data to validate which version promotes higher customer satisfaction.

ACSI (American Customer Satisfaction Index) - A national cross-industry measure of customer satisfaction. This index measures the satisfaction of U.S. household consumers with the quality of products and services offered by both foreign and domestic firms with significant share in U.S. markets. The ForeSee® Methodology was founded based on the ACSI.

ANI (Automatic Number Identification) - A service that provides the receiver of a telephone call with the number of the calling phone (e.g., Called ID). In a call center, ANI displays the number of the calling party to the call center agent in real time. Among other things, the call center can use the information to forward calls to different people for different geographic areas. In ForeSee context, the client may pass the ANI along with the caller to the [IVR](#1343520362) Survey application to allow for additional fields (call date, time, Agent ID, etc.) to be appended to the data on the backend, matching on the ANI, through an integration process.

API (Application Programming Interface) - Application-to-application “contracts”, where one program makes a set of services available for use by other applications and publishes the API’s (i.e., the rules) that must be followed to access the services provided by the program. ForeSee has a public API available that allows clients to pull data from our system, though we don’t allow clients to push data back via our API at this time.

Benchmarks - A benchmark is a standardization that serves as a basis for evaluation or comparison. In terms of ForeSee, benchmarks are the mean scores/values for whatever the client wants to compare, such as their [WOMI](#-379103684) score, [NPS](#-1418905076) score, or Satisfaction score to the industry average.

BOPIS (Buy Online, Pickup In Store) - A type of retail fulfillment experience where the consumer initiates and completes the purchase of a product online, but instead of having the product shipped to their residence, they pick the product up within a physical store after a specified period of time. The store may either have the product in-stock already or may need to have the product shipped to that specific store from another store or a warehouse.

CDN (Content Delivery Network) - A system of distributed servers (network) that deliver web pages and other web content to a user based on the geographic locations of the user, the origin of the webpage, and a content delivery server. All ForeSee client code is hosted on a CDN (Fastly or AWS).

Click ‘n’ Collect - This is the term commonly used in the United Kingdom to describe a Reserve/Buy Online Pick-up in Store ([ROPIS](#-431204804)/[BOPIS](#-463710660)) experience.

Codify - The process of taking a list of responses (e.g., Product Names, Age, etc.) and categorizing them into a more refined set to allow for segmentation via filtering. Each category (Product A, Product B, etc.) is assigned a code (e.g., 1, 2, 3, 4) to allow a programmatic way to segment the data.

CPP (Customer Passed Parameter) - A Customer Passed Parameter is a data point created by, or currently available from, the survey respondent that is captured at the time of survey submission (in contrast to an [EPP](#154352140), which appends the data after submission). CPPs can typically be captured via a variable, cookie, or URL string accessible while ForeSee code is running. Common CPPs include the browser, device, and operating system the respondent used to view the web site. Using CPPs or EPPs is dependent on the type of deployment and how the client's system can efficiently pass the data to ForeSee. See [Store Measure](#1871256411) for examples of both CPPs and EPPs.

CQ (Custom Question) - These are the diagnostic questions included in surveys that allow for deeper segmentation of the ForeSee performance metrics (i.e., Model Results). Clients typically have more flexibility in designing and modifying the Custom Questions during the contract term. Custom Questions are not used in calculating scores, satisfaction, or impacts.

CRM (Customer Relationship Management) - At its simplest, a CRM system allows businesses to manage business relationships and the data associated with the relationship. With CRM, you can store customer and prospect contact information, accounts, leads, and sales opportunities in one central location (ideally in the cloud so the information is accessible by many) in real time. A key example of a CRM is Salesforce. In ForeSee context, many clients request the ability to integrate ForeSee into their CRM or their CRM data into Foresee.

CRM (Customer Relationship Measure) - A single, dedicated measurement of the target audience’s satisfaction with the overall relationship with the company cumulative of all interactions. It is NOT measuring satisfaction with a specific channel, in-channel experience, or brand affinity/awareness.

CSAT - Customer Satisfaction.

CSS (Cascading Style Sheets) - A style sheet language used for describing the presentation of a document written in a markup language. It is one of the three languages, along with [HTML](#-1166733512) and [JS](#622058555), from which our trigger code is built.

CSV (Comma Separated Values) - A standard file format used to store and transfer data. CSV files are commonly used within CX Suite for uploading [Hierarchies](#_Ref292376373) and [Custom Data Feeds](#_Ref1169914839).

Customer Effort Score – A metric utilized by organizations to measure the actual level of effort a customer has put into resolving their needs against their level of expected effort it should have taken. Typically, this is measured through the use of a rating question.

Domain - When most people think of a website domain, they are actually thinking of what is called the mid-level domain. For the website foresee.com, ".com" is the top level domain while "foresee" is the mid-level domain. Another example would be target.com where the “target” part of the domain is the mid-level domain. A domain name is commonly part of a larger internet address called a [URL](#993546454). A URL goes into much more detail than domain name, providing much more information, including the specific page address, folder name, machine name, and protocol language.



Dynamic Routing/Cloud Based Routing – Dynamic Call Routing is the process of automatically re-routing a call based on specific criteria change (such as time of day or as the network traffic levels of congestion).

Dynamic Text - Dynamic text is verbiage that changes based on some predetermined criteria. When you insert a piece of dynamic text, it automatically displays the current value of its respective property. When that property is updated, the dynamic text automatically updates. Dynamic text works through the use of syntax tags in the HTML code. This allows the combination of both dynamic and static text in a single text element and applies the available formatting options to customize the resulting text display. In ForeSee context, dynamic text is utilized when personalizing email invitations with the respondents First/Last name, or inserting a brand name into the survey for panel studies or enterprise configurations. There are limitations in which this capability can be deployed and whether it requires additional investment.

Elements - This is the left side of the ForeSee® Model and are the key components of the experience we measure that have an impact on satisfaction. They are sometimes referred to as Drivers of Satisfaction, Attributes of the Experience, or Levers.

EPP (External Passed Parameter) - An External Passed Parameter is a data point provided via an independent file. Data fields are sent in a separate data file and are matched up by the client, which are then loaded to the portal or appended by IS (in contrast to a [CPP](#154221068), which loads the data at the time of submission). Using CPPs or EPPs is dependent on the type of deployment and how the client's system can efficiently pass the data to ForeSee. See [Store Measure](#1871256411) for examples of both CPPs and EPPs.

eVars (Omniture) - eVars are conversion variables within Adobe Omniture. Conversion variables refer to data dimensions used to segment out conversion events, such as “which products were purchased the most?” or “how many clicks did we get for each of our marketing campaigns?” For more information on eVars, please click [here](https://www.lynchpin.com/blog/props-or-evars-beginners-guide/). In ForeSee context, there are limitations imposed by Adobe Omniture on the number of eVars that can be passed back for access within the ForeSee® Portal. For more on Clickstream Integration capabilities, click [here](https://docs.google.com/presentation/d/1cbuvnCxOQHmrtHeuOo5XZ9LBwHo2aU4TziHCS4x0QoU/edit#slide=id.g728ae81b5_0_0).

EXDL (External Data Load) - EXDL is the main product that is used to automate data pulls and pushes from our internal systems with external systems. This process is used to accommodate email deployments and integration services.

Filter - The primary use of filters at ForeSee is within the online portal to increase or decrease the granularity of the data. A “Filter” can be created using a combination of responses to questions asked on the survey or values provided within a [CPP](#154221068)/[EPP](#154352140). Filters are key to data segmentation capabilities.

First Call Resolution – A metric utilized by organizations to measure the ability of the caller to resolve their issue through a single contact to the organization. There are a variety of methods in which this can be measured – typically requiring a combination of self-reported success in combination with historical interaction tracking.

Future Behaviors (FBs) - This is the right side of the ForeSee model and are the key outcomes the client would like to see as a result of improving customer satisfaction (i.e., behaviors they want to see the target audience perform more of as a result of being more satisfied with the experience). They are sometimes referred to as the Return on Investment (ROI) for making improvements in satisfaction.

FTP (File Transfer Protocol) - This is the standard method used to transfer files from one host to another the internet. ForeSee can set up FTP accounts for our clients in order to receive files from them for data integration, transaction data, or email surveys, and also for sending our portal reports to the client. We use a Secure FTP - commonly referred to as [SFTP](#1888055206).

FXI (ForeSee® Experience Index) - An annual panel study done by ForeSee, using the ForeSee® Methodology, centering on the current state of the retail customer experience. Results are published in the media annually and freely available to the public.

HIPAA (Health Insurance Portability and Accountability Act) - Legislation that provides data privacy and security provisions for safeguarding medical information. In order for ForeSee to maintain compliance, we impose specific limitations around what data can be collected and we also accommodate stronger security profiles for measures/accounts deemed as HIPAA accounts.

HTML (HyperText Markup Language) - A standardized system for tagging text files to achieve font, color, graphic, and hyperlink effects on web pages. It is one of the three languages, along with [CSS](#-1016472517) and [JS](#622058555), from which our trigger code is built.

InSession - InSession refers to when the visitor takes the survey after receiving and accepting the invitation. With InSession, the survey displays immediately after accepting the invitation, instead of after the visitor has met an exit condition (e.g., travelled to a new domain, closed the browser, or moved to a page without our code present). Both desktop and mobile surveys can be InSession, though this is not considered best practice for desktop.

IVA (Intelligent Voice Automation) - A system that uses voice instead of touch-tone to capture data. IVA is one of the ways ForeSee implements phone surveys. With IVA, the survey questions are computer recorded and the respondent answers questions verbally instead of by touch pad. Currently, ForeSee does not allow for verbal responses to the surveys, but can allow for the use of computer generated voice prompts (as opposed to human voice recordings).

IS (Implementation Services) - The department within ForeSee that provides implementation and technical support both internally and externally.

ISPU (In-Store Pick-Up) - A type of retail fulfillment experience where the consumer initiates and completes the purchase the product online, but instead of having the product shipped to their residence, they pick the product up within a physical store after a specified period of time. The store may either have the product in-stock already or may need to have the product shipped to that specific store from another store or a warehouse. The model focuses primarily on the In-Store experience and not on the ordering process that took place prior to that.

IT (Information Technology) - This refers to the use of any computers, storage, networking, and other physical devices, infrastructure and processes to create, process, store, secure and exchange all forms of electronic data. The department that manages these systems for ForeSee is often referred to as “IT”.

IVR (Interactive Voice Response) - A system that uses responses from a touch tone phone to gather and store data. IVR is one of the ways ForeSee implements phone surveys. With IVR, the survey questions are recorded by a human voice and the respondent taking the survey answers the questions through the touch pad on their phone.

JS (JavaScript) - A popular programming language that ForeSee uses in the creation of invitations and surveys, along with [HTML](#-1166733512) and [CSS](#-1016472517). The JavaScript portion can be thought of as the backbone of our code package.

Latent Variable - A Latent Variable model is a statistical model that relates a set of variables (so- called [Manifest Variables](#-1571715901)) to a set of Latent Variables.

LF (Loyalty Factor) - This refers to the number of web pages within the same domain that must be viewed before a visitor is eligible for a survey invitation. Once the LF threshold has been met, the visitor is then qualified to fall within the Sampling Percentage criteria. The Loyalty Factor only increments for active tabs. If a visitor has two tabs open for the same website in the same browser window, the tabs do not aggregate the number of page views to reach the LF. One page will reach it before the other.

Live Date (Panel Study) - The full launch of the survey by the panel company. Follows the [Soft Launch](#-811697628).

Manifest Variable - A variable that can be directly measured or observed. It is the opposite of a [Latent Variable](#-4948793), which cannot be directly observed. Manifest Variables are used in Latent Variable statistical models, which test the relationships between a set of Manifest Variables and a set of Latent Variables.

MID (Model Instance Identifier) - This identifier is assigned to each version of a survey to allow for programmatic identification of the survey results within the ForeSee data infrastructure.

MPLS (Multiprotocol Label Switching) - A protocol for speeding up and shaping network traffic flows. Within the context of ForeSee, clients with an IVA/IVR deployed Contact Center measure must be able to pass us the agent ID, for which MPLS is one of the three options of passing this data. However, this option is the most cost prohibitive for clients and least likely to be something the client supports.

MQs (Model Questions) - Questions within our surveys that we use to quantitatively develop scores and impacts. Model Questions are the individual rating questions within each Element, Satisfaction, and Future Behavior component of the model.

N Count - The total number of [respondents](#821858013) to a survey within a given time span.

Nested Questions - This is skip logic in [Custom Questions](#146326897). Only certain questions are asked based on the respondent’s answers to previous questions.

NPS (Net Promoter Score) - A proxy measurement for true Satisfaction, based on asking a single question about likelihood to recommend a business, and calculated by subtracting the percentage of those who score low (0-6) “Detractors” from the percentage who answer high (9-10) “Promoters”. NPS is widely used across many organizations because it provides a single metric that the C-Suite can track. ForeSee has historically recommended against companies using NPS as the single metric for tracking customer experience success, as it is an outcome of improving Satisfaction. Whereas the ForeSee® Methodology provides predictive analytics allowing the client to prioritize improvement efforts that drive up Satisfaction, thus impacting Future Behaviors, such as Likelihood to Recommend.

OAMOE (Online Alternate Method of Entry) - Clients can offer sweepstakes as an incentive to visitors for taking Store Measure surveys. By law, an alternate method of entry without having to purchase is required. We can create an OAMOE page to be shown after the survey has been completed.

OnExit - OnExit refers to when the visitor takes the survey after receiving and accepting the invitation. Instead of the survey displaying immediately after the visitor accepts the invitation, there is a tracker window that tracks the website session. As soon as the visitor ends their session, either by closing the tab/window or leaving the domain, the survey presents within the tracker window.

Over Quota (Panel Study) - The number of completed responses over the contractually required amount. ForeSee is charged an additional fee for each over-quota response.

Panel - In the context of ForeSee, a panel is a group of people with shared/similar experiences whom are accessed through a third party panel provider, such as [Research Now](http://www.researchnow.com/en-US/Panels.aspx) or [Federated Sample](https://luc.id/), for the purpose of surveying. ForeSee utilizes Panel Sample primarily for Competitive Studies or syndicated research projects (such as [FXI](#607622452)).

PBX/ACD Systems - “PBX” and “ACD” are [switches](http://www.differencebetween.net/technology/industrial/difference-between-one-way-electrical-switches-and-two-way-electrical-switches/) of different capabilities. “Switch” refers to a telecommunication switch. These switches are electronic equipment which are designed and responsible for accepting, holding, and routing telephone calls. There are different applications for switches. For a detailed explanation of how these switches compare – please click [here](http://www.differencebetween.net/technology/communication-technology/difference-between-pbx-and-acd/).

Partitioning - To reduce the length of our surveys, we break the model elements/questions up into different groups so each respondent doesn’t have to answer all [Model Questions](#146982257). Then, based off what they did answer, we can input what they would have answered for the Model Questions they were not asked, which is why we use the 300 n counts.

PGP (Pretty Good Privacy) - A data encryption and decryption computer program that provides cryptographic privacy and authentication for data communication. PGP is often used for signing, encrypting, and decrypting texts, emails, files, directories, and whole disk partitions, as well as to increase the security of e-mail communications.

PPT (PowerPoint) - PowerPoint is an application within the Microsoft Office suite that allows the user to create visually appealing slides which can contain different pics, charts and graphs, animations, etc.

Premium Segments - Clients who do not want to purchase a separate measure for each brand or language can purchase a Premium Segment at a discounted price. This allows the client to present branded and/or different language invitations and surveys as well as different [CQs](#146326897) within the survey to the target audience. However, the Premium Segment must use the same [Model Questions](#146982257) as the base segment.

Priority Map - The Priority Map is a visual representation of the model element impacts and scores that allows the client or analyst to understand which elements should be focused on. The map is made up of quadrants, with element scores represented on the y-axis and impacts being represented on the x-axis. Elements are shown as colored circles of varying sizes, with elements that have lower scores and higher impacts being larger circles. Based on the date range selected you can view the customer perceptions of your elements, tracking their changes over time and based on changes made to the site/experience.

PSTN (Public Switched Telephone Network) - This is the world's collection of interconnected voice-oriented public telephone networks, both commercial and government-owned. The network is also referred to as the Plain Old Telephone Service (POTS). Within the context of ForeSee, clients with an [IVR](#1343520362) deployed [Contact Center](#_Ref1226962925) measure must be able to pass us the agent ID, in most cases, if they are using PSTN technology to support their telephony system, then all they are able to pass is the caller’s [ANI](#2126193474). In this case, they must do additional back-end work to match the ANI to their [CRM](#-963948330), append the Agent ID, and then pass that data to ForeSee utilizing integration services.

Push Report - Any of the reports in the portal that can be set up as a subscription and “pushed” to the recipients by the ForeSee® Portal workspace or by email.

Qualifier (Panel Study) - Also called Qualifier Page. A survey page consisting of questions that determine whether or not the panel participant meets the criteria specified by the client for each of the target audience groups in a study.

Quality Monitoring Systems – In [Contact Centers](#_Ref1226962925), clients employ the use of additional software to help capture metrics that can identify the quality of their Contact Center response efforts (e.g., number of calls received, number of calls in queue, Length of time in Queue, Length of time to complete call, number of transfers, number of dropped calls, etc.)

Quota (Panel Study) - The number of completed responses contractually required for each brand/target audience group included in a study.

Regex (Regular Expression) - A regular expression is a way for a computer user or programmer to express how a computer program should look for a specified pattern in text and then what the program is to do when each pattern match is found. For example, a regular expression could tell a program to search for all text lines that contain the word "Windows 10" and then to print out each line in which a match is found or substitute another text sequence (for example, just "Windows") where any match occurs. Regular expressions can be used as a filtering function within the ForeSee® Portal.

Respondent - A person who completes and submits, i.e., responds to a survey. The term [n count](#538928101) is used when referring to a specific number of respondents.

RFI (Request For Information) - A standard business process where the purpose is to collect written information about the capabilities of various suppliers. Typically RFI’s follow a format established by the client that can be used for comparative purposes.

RFP (Request For Proposal) - A document containing specific business related questions that an organization posts to elicit bids from potential vendors for a desired solution. The RFP specifies what the client is looking for and establishes evaluation criteria for assessing proposals.

ROPIS (Reserve Online, Pickup in Store) - In comparison to [BOPIS](#-463710660), customers don’t actually purchase the product through the digital channel. Instead, they reserve it online and then pay when they pick it up from the physical store.

Sample/Sampling - Sampling is the process of selecting units (e.g., customers, website visitors) from a population of interest.

SDK (Software Developer Kit) - Typically, a set of software development tools that allow for the creation of applications.

SFTP (Secure File Transfer Protocol) - SFTP is a method of transferring files between computers over a secure [SSH](#-970793925) secure data stream. ForeSee can set up SFTP accounts for our clients in order to receive files from them for data integration, transaction data or email surveys, and also for sending our portal reports to the client.

SIP (Session Initiation Protocol) - The Session Initiation Protocol is a communications protocol for signaling and controlling multimedia communication sessions. The most common applications of SIP are in Internet telephony for voice and video calls, as well as instant messaging, over Internet Protocol (IP) networks.

Site Key - A code snippet to associate a web page to a specific endeavor. For [Feedback](#_Ref-144884845), a site key is used by companies with multiple product lines or brand labels to assign projects accordingly and keep data separate for each line or label. For example, a retail company may use one site key for their brick-and-mortar stores, another for outlet centers, and a third for online sites. When [creating a Feedback project](#_Ref-818973671), you can assign the survey to the corresponding site key.

SMS (Short Message Service) - A text messaging service component of mobile phone communication systems. This is what most people think of when they think of texting. ForeSee utilizes SMS to send survey invitations through text messages. This process requires the use of a third party vendor that is provided the mobile phone numbers collected within the ForeSee® Mobile Survey invitation and then manages the deployment of the text invitation.

SMVC (Social Media Value Calculation) - A ForeSee designed metric for trending and benchmarking that indicates the significance of Social Media in driving digital customer traffic. By integrating with customer spend data, you can determine the value of the customers who are heavily engaged in social media in comparison with those less engaged with social media.

Soft Launch (Panel Study) - An initial test fielding of the survey by the panel company to assess response to the survey.

sProp (Omniture) - An sProp is a custom traffic variable inside Omniture, a counter when something happens on the page of a website. Examples would include specific search terms or specific site sections. For more information on sProps, please click [here](https://www.lynchpin.com/blog/props-or-evars-beginners-guide/).

SQL (Standard Query Language) - SQL (pronounced SEE - kwill) is used to communicate with a database. According to the American National Standards Institute (ANSI), SQL is the standard language for relational database management systems.

SSH (Secure Shell) - A command interface and protocol for securely getting access to a remote computer.

SSO (Single Sign On) - A session/user authentication process that permits a user to enter one name and password in order to access multiple applications. The process authenticates the user for all the applications they have been given rights to and eliminates further prompts when they switch applications during a particular session.

Standard Segment - Clients who do not want to purchase a separate measure for each brand or language can purchase a Premium Segment at a discounted price. This will allow the client to present branded and/or different language invitations and surveys as well as different CQs within the survey to the target audience. However, the Premium Segment must use the same Model Questions as the base segment.

STYP (Smart Thank You Page) - Smart Thank You Pages are components of the survey but are sometimes referred to as their own products. The purpose of the STYP is the display different appreciative content based on the survey responses. STYPs can be used as part of any measure, including [Store](#_Ref871924142) or [ESat](#_Ref1308049604) measures.

Taxonomy - A collection of words and phrases pertaining to a specific theme or subject for the purpose of reporting. In [Text Analytics](#_Ref984771445), taxonomies are pre-built for such industries as retail, financial services, and government. These taxonomies provide a standard list of topics to categorize the data so analysts can identify important topics. See [Taxonomy](#1677823182) for more information.

Telephony/CTI Systems - Refers to computer hardware, software, and computer network systems that perform functions traditionally performed by telephone equipment.

Telephony Switch - A software and hardware device that controls and directs voice and data traffic. Telephony switches are one of the ways clients can manage the call prompting/invitation process within their [IVR](#1343520362) system for Call Center measures.

Terminate (Panel Study) - The page a potential respondent receives when they do not meet the survey eligibility criteria.

True Conversion - The percentage of users that came with the intent to complete an action (make a purchase, download materials, sign-up for a newsletter, etc.) and actually did complete this action within seven days (the True Conversion for the client).

URL (Uniform Resource Locator) - A reference (an address) to a resource on the Internet. The term "Web address" is a synonym for a URL that uses the HTTP or HTTPS protocol.



Versioning - Versioning is the creation and management of multiple releases of a product, all of which have the same general function but are improved, upgraded, or customized. The term applies especially to operating systems (OSs), software, and Web services. In terms of ForeSee, we version our software, clients are interested in versioning their surveys, and within CS and Usability, clients are interested in versioning their websites.

VPAT (Voluntary Product Accessibility Template) - A document which evaluates how accessible a particular product is according to Section 508 Standards. VPATs are used by buyers to determine how accessible a product is and where any potential deficiencies are. This documentation may be required by some buyers before a purchase is made. The official VPAT forms are hosted by the Information Technology Industrial Council and can be found here: <http://www.itic.org/dotAsset/5644ecd2-5024-417f-bc23-a52650f47ef8.doc>.

WOMI (Word of Mouth Index) - A ForeSee designed metric to address the business desire for a "Word of Mouth Metric" that is more reliable and accurate than [NPS](#-1418905076). It eliminates a key assumption of NPS and calculates a Likely to Recommend score based on two questions, "Likelihood to recommend" vs. "Likelihood to discourage" (subtracting the latter percentage from the former) to provide a more stable metric on the same scale (-100 to 100) as NPS.

Workforce Management Systems – Systems utilized internally for effective management of call queues and available agents to respond to those calls.

XLM (Extensible Markup Language) - XLM was the default macro language for Excel through Excel 4.0. Beginning with version 5.0 Excel recorded macros in Visual Basic for Applications (VBA) by default. However, with version 5.0, XLM recording was still allowed as an option. After version 5.0 that option was discontinued. All versions of Excel, including Excel 2010 are capable of running an XLM macro.

XLS (.xls) - XLS is a file extension for a spreadsheet file format created by Microsoft for use with Microsoft Excel. XLS stands for eXceL Spreadsheet.