Customer Engagement App
Lunch-n-Learn Integrated Experiences

What agenda?

TODAY'S SESSION IS FOCUSED ON:

- How Integrated clients can best use the new EXPERIENCES tab in the CE App?

- How does this change the workflow?

- Show me an example!

Briefing Navigation - Experiences

Briefing Details

Overview
Attendees
Experiences
Evaluations

Emerson Electric Co.

Emerson Electric Co.

Client Briefing | In-Person
Signet CXC
Briefing Manager: Cindy Mills
Mon, Jul 26, 2021 | 8:30am - 11:30am CDT
Virtual Room 2
Wed, Jul 28, 2021 | 8:30am - 11:30am CDT
Virtual Room 2

Briefing Status: Active
Ext ID: 10740 | PIN: INVG7TZK

👥 Internal Attendees: 10
☰ Agenda Topics: 10
🎤 Speakers: 12
👥 External Attendees: 4

Launch Virtual Welcome ↗

Send Meeting Invite ✉
Share CE App Access ✉

Left Nav Category Uses

Overview	Briefing Overview
Attendees	View briefing attendees
Experiences	Control briefing level (Customer Media, Virtual Warmer Media, Salutations, Quick Links, Tabs)
Evaluations	View/download received feedback

Briefing: Experiences - Content

Virtual Screens

Virtual Welcome Additional Media

[Upload]

Optimal media size is 1280px wide or 720px tall. Supported media types include JPG and PNG.

Show Default Additional Media
⬤ Yes

Customer Engagement App

CE App Customer Media

= 🗅 Signet+ABPM+2020+Sprin... ⊗

[Upload]

Supported media types include jpg,jpeg,png,mp4,pdf,mov,wnv.

NEW FEATURE

Add briefing specific Virtual Warmer Content
Team Intros/Bios
Virtual Etiquette
Conference Announcement
Industry related content

NEW FEATURE!

ENHANCED
- no size limits
- no file name issues
- Instantly visible in CE App

Add briefing specific Digital Content for the CE App
Discussion Leader Content
Briefing Prep Content

Briefing: Experiences –Salutations/Quick Links

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Salutations

Add Salutation

ORDER	SALUTATION NAME	AVAILABILITY

Salutation messages added here will replace the default salutation messages.

Personalize any phase salutation at the briefing level

Custom Welcome
Lunch announcements
Welcome Back language

Add briefing specific Quick Links

Specific Press Release
Specific Webpage
Lunch Orders

NEW FEATURE!

Quick Links

Add Quick Link

ORDER	DISPLAY NAME	URL/APPLICATION TAB	AVAILABILITY

Quick links added here will be additions alongside the default quick links.

Briefing: Experiences – Application Tabs

Application Tabs

ORDER	TAB NAME	PAGE TITLE	AVAILABILITY
1	Home	Home	Pre-Briefing, Day-of-Briefing, Post-Briefing
2	Digital Content	Digital Content	Pre-Briefing, Day-of-Briefing, Post-Briefing
3	Feedback	FeedbackTest	Day-of-Briefing, Post-Briefing
4	Signet CXC	Signet CXC	Pre-Briefing, Day-of-Briefing, Post-Briefing
5	Agenda	Agenda	Pre-Briefing, Day-of-Briefing, Post-Briefing
6	Discussion Leaders	Discussion Leaders	Pre-Briefing, Day-of-Briefing, Post-Briefing
7	Concierge	Concierge	Pre-Briefing, Day-of-Briefing, Post-Briefing
8	User Group Recording	User Group Recording	Disabled

Personalize tab visibility at the briefing level

Set for specific phase or disable fully

Application Tab Details

Standard, Discussion Leaders

Show in Briefing Instance

- ☑ Pre-Briefing
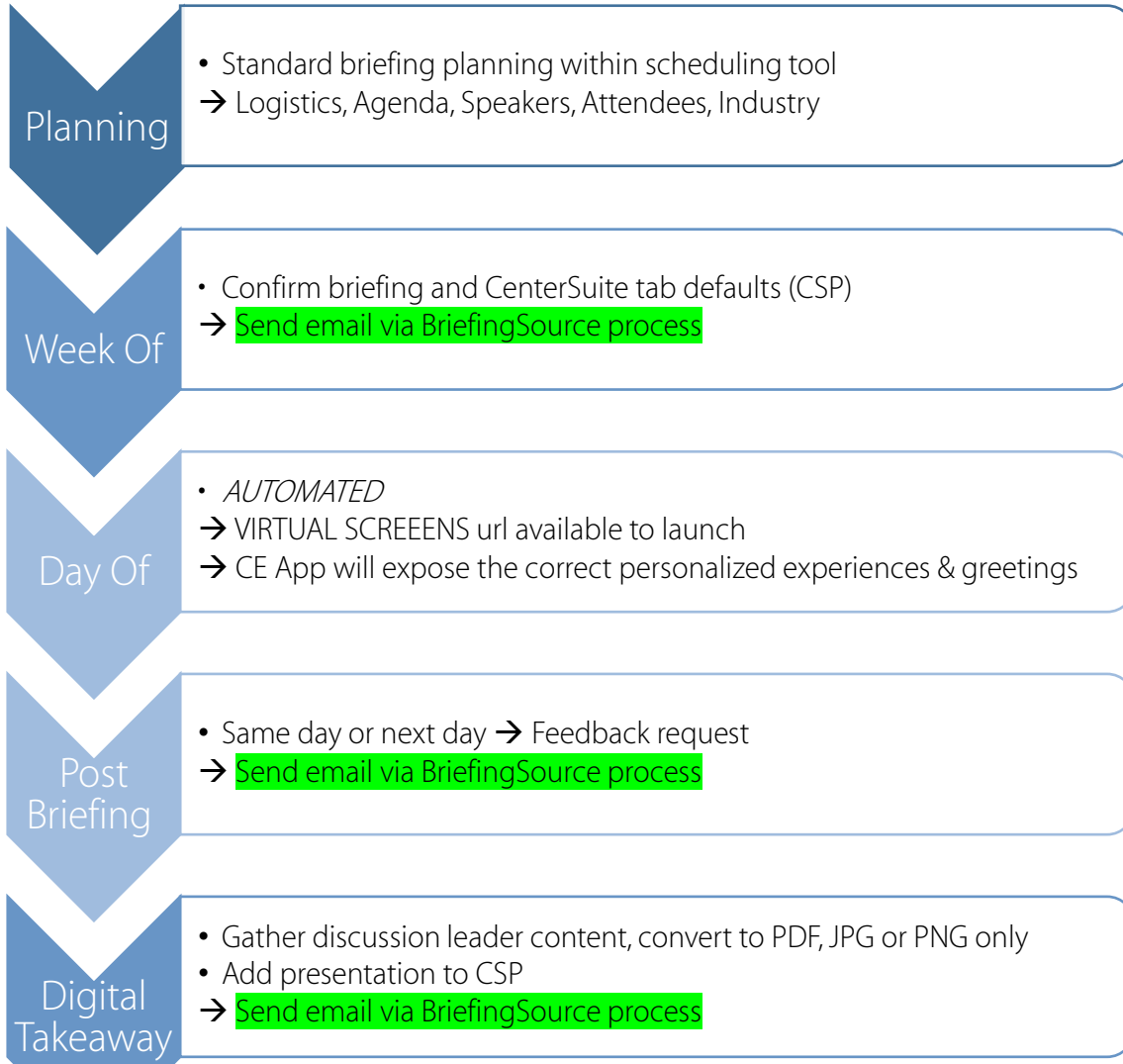- ☑ Day of-Briefing
- ☑ Post-Briefing

Save   Cancel

ENHANCED
- Custom Tab Mgmt.

Briefing Workflow

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BRIEFING TIMELINE	KEY DRIVES FOR A SUCCESSFUL CLIENT EXPERIENCE

Planning
- Standard briefing planning within scheduling tool
  → Logistics, Agenda, Speakers, Attendees, Industry

Zoom (WebEx, GoToMeeting) URL entered?
Speakers marked as accepted?
Industry aligned?

Week Of
- Confirm briefing and CenterSuite tab defaults (CSP)
  → Send email via BriefingSource process

Briefing status is **Confirmed (vs Approved)**
Attendee emails are entered
Preview CE App Experience (quick grab from BS eval tab)

Day Of
- *AUTOMATED*
  → VIRTUAL SCREEENS url available to launch
  → CE App will expose the correct personalized experiences & greetings

Launching the Zoom/WebEx/Team?
Not launching? Right click to copy the URL and share with the presenter for a polished look!

Launch Virtual Welcome ⬀

Post Briefing
- Same day or next day → Feedback request
  → Send email via BriefingSource process

Confirm attendee list (additions from briefing)
Preview CE App Experience (quick grab from BS eval tab)

Digital Takeaway
- Gather discussion leader content, convert to PDF, JPG or PNG only
- Add presentation to CSP
  → Send email via BriefingSource process

Timeliness is key, less than 7 days is a recommendation
Preview CE App Experience (quick grab from BS eval tab)

Let's dive in!