



# CenterSuite Platform - User Group

February 24, 2021

# Agenda & Introductions



## Agenda

- Challenges & Solutions
- Open Discussion
- New Features
- Product Roadmap
- Q&A

## Success



Liz Blacklock  
Customer Success Manager



Rebecca Cortez  
Customer Success Manager



Shankar Sahai  
Sr. Director, Client Success

## Products



Neil Rieger  
Director, Product Design

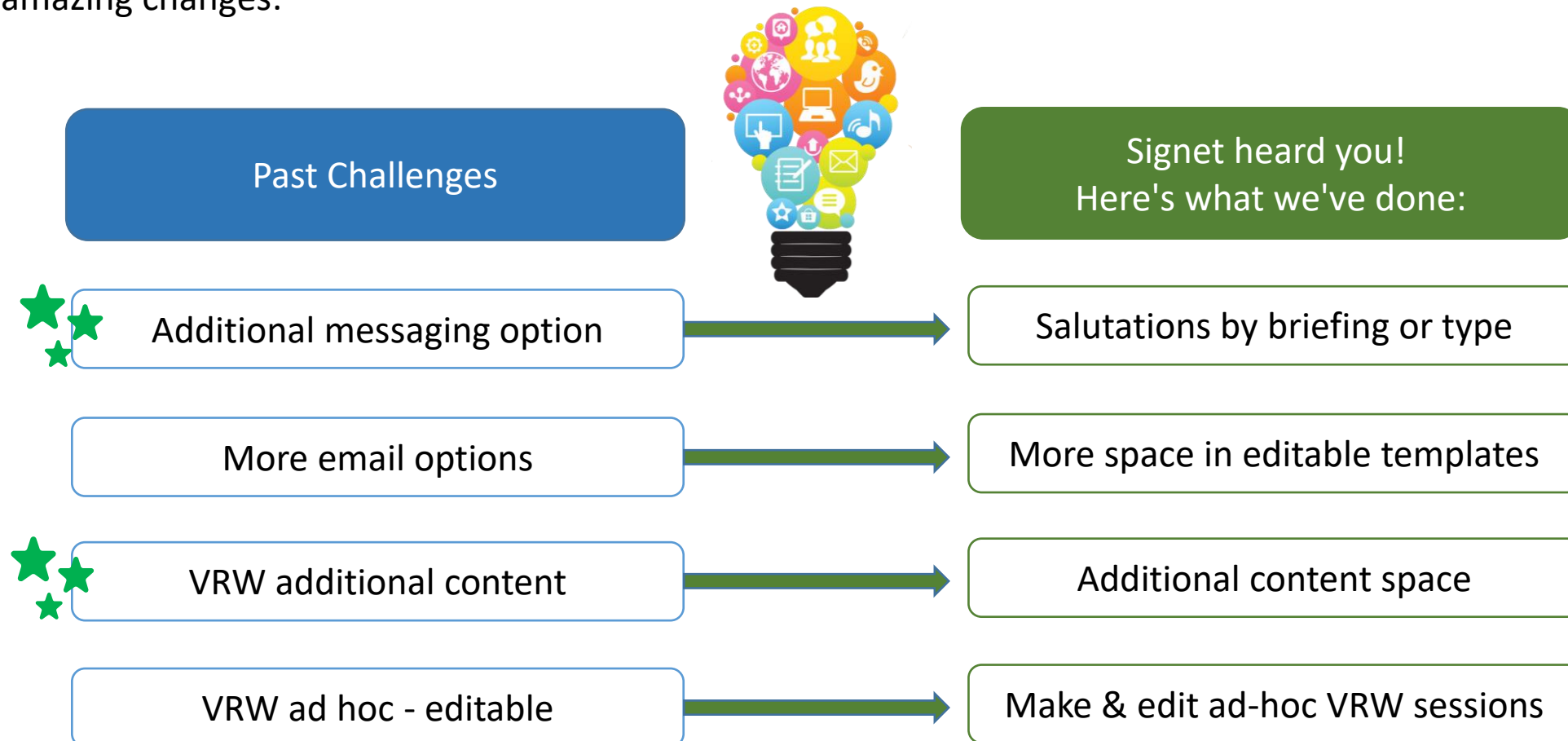
# Welcome!



# Challenges and Solutions



Throughout the past couple months, customers have given us some really helpful comments about the Center Suite Platform. We wanted to let you know that we were able to use your feedback to develop some amazing changes:



We'd love to hear from you now. Tell us about your experiences using the Customer Suite Platform!

1

## Increasing feedback from briefing attendees

- Incentivize feedback with donations
- Reminder in Virtual Room Warmer
- Gather feedback *during* the meeting (*last few minutes of presentation or break*)

4

## Add company branding to email templates

- Customize the emails to our customers

2

## Manage both Pre and Post survey feedback

- Define Pre-Survey needs?
- Same questions pre and post?
- Pre is prep questions for the presenters?

5

## Feedback Tab

- Link directly to the feedback page
- Before/after visit feedback – ability to measure change
- Character count limited

3

## Organization indicated in email send (i.e. [companyname@center-suite.com](mailto:companyname@center-suite.com) or @companyname.com)

- Increase open rate for email

6

## Database of contacts

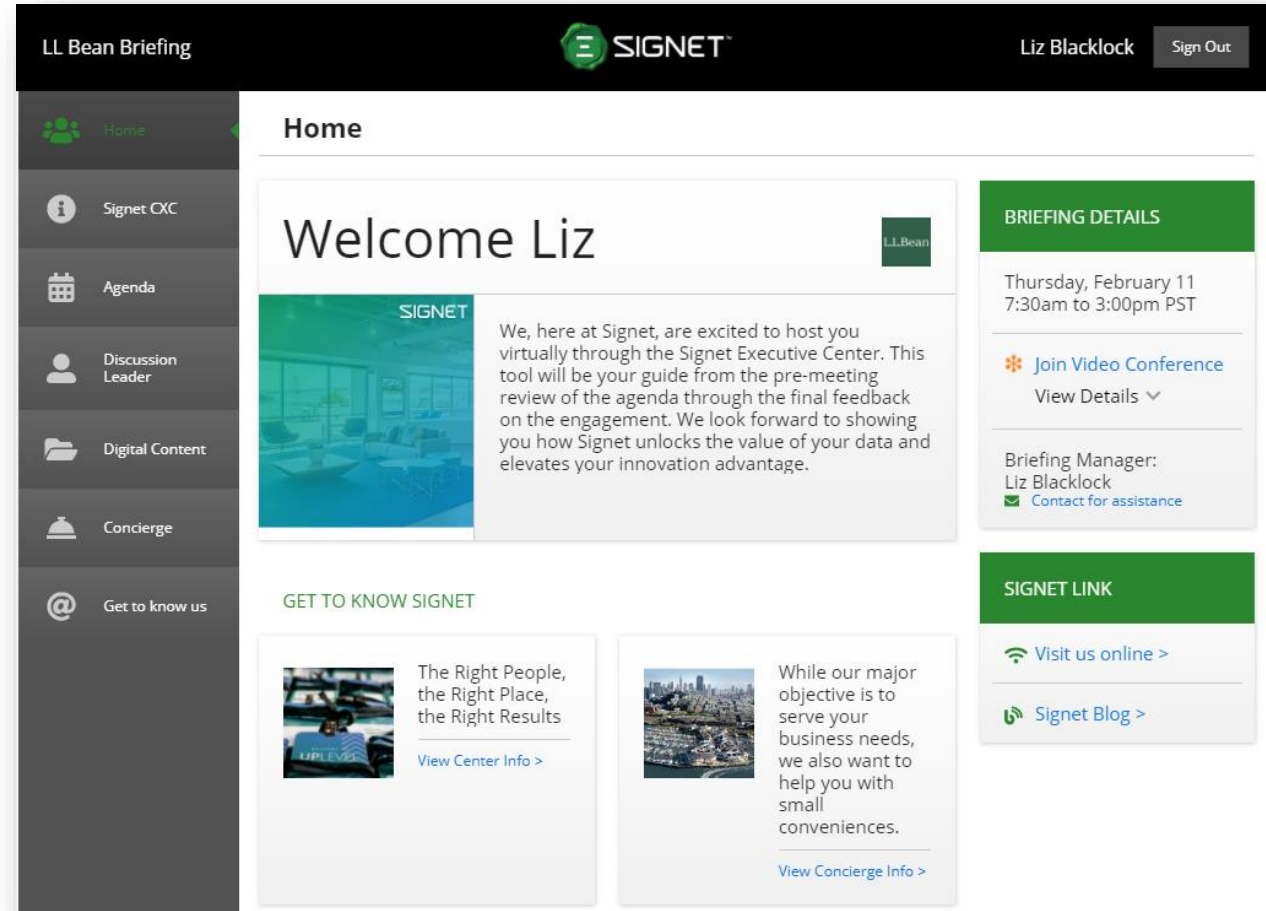
- Easy way to pull in employees that have previously been included in briefings.

# CE App – New & Improved Features



MAR 2021 Release - Global


- SSO login options
- User Mgmt. (Permissions and Centers)
- Analytics
- UI Fixes and Updates
  - MEDIA tab update
  - Home screen text updates
  - Calendar View



# Accessibility & User Roles



User Accessibility  
SSO offered



Sign in with your corporate ID

Signet-SSO

Sign in with your email and password

Email

Password

or

[Forgot your password?](#)

Sign in

Reach out to you CSM to inquire about this process!

User Roles/Functionality  
Role Management  
Center Preferences  
User Management








Home Engagement Experience Content Insight Health

Settings User

Users

Add User

Search

NAME	SYSTEM ROLE	LAST MODIFIED
 Anna Wu	Admin	12/08/2020
 Bryce Larkin	Manager	12/08/2020
 Carina Miller	Manager	12/08/2020
 Chuck Bartowski	Admin	12/08/2020
 Devon Woodcomb	Manager	12/08/2020



# CE App Analytics



**Analytics**  
CE App Usage  
Media Item Usage  
Section/Tab Usage

Analytics

CE App Scheduler

App Usage

Section Views

Media Metrics

TOTAL # OF DAILY SESSIONS

AVG # OF PAGE VIEWS

AVG # OF MEDIA VIEWS

AVG # OF MEDIA EMAILED

212

14

25

7

ATTENDEE NAME	DATE	START TIME	CUSTOMER NAME	BRIEFING ID	PAGE VIEWS	MEDIA VIEWS	MEDIA EMAILED
Jonathon Smith	Fri, Sep 18	10:08am	Bank of America	0001	6	8	3
Jonathon Smith	Fri, Sep 18	12:45pm	Bank of America	0002	9	6	2
Jane Smith	Fri, Sep 18	11:28am	Bank of America	0003	4	5	3
Jonathon Smith	Sat, Sep 19	5:12pm	Bank of America	0004	14	20	8
Michael Scott	Mon, Sep 21	9:02am	Bank of America	0005	12	26	9
Jonathon Smith	Mon, Sep 21	10:08am	Bank of America	0006	5	15	10
Jonathon Smith	Mon, Sep 21	4:15pm	Bank of America	0007	13	27	12
Jane Smith	Tue, Sep 22	11:11am	Bank of America	0008	10	32	21

CE App Usage Analytics + export!

Analytics

CE App Scheduler

App Usage

Section Views

Media Metrics

AVG # OF VIEWS

AVG # OF VIEWS PER BRIEFING

101.1

3.7

SECTION NAME	SECTION TYPE	# OF BRIEFINGS	# OF PAGE VIEWS	AVG VIEWS PER BRIEFING
Home	Standard	36	124	3.4
Center info	Standard	36	112	3.1
Agenda	Standard	36	120	3.3
Feedback	Standard			
Speakers	Standard			
Media	Standard			
Concierge	Standard			
Demo	Custom			

Tab Analytics + export!

Analytics

CE App Scheduler

App Usage

Section Views

Media Metrics

TOTAL # OF VIEWS

AVG # OF VIEWS

TOTAL # EMAILED

AVG # EMAILED

212

24

144

11

MEDIA NAME	FILE TYPE	# OF VIEWS	# OF EMAILS	MEDIA TYPE	INDUSTRY
videomedianamethatissuperlongname.pdf	PDF	5	1	Customer Media	All
background media name that is super long	PDF	4	2	Related Media	General
Hitachi Brand Video 2020	Video	6	2	Related Media	All
videomedianamethatissuperlongname.pdf	PDF	2	2	Related Media	Automotive, Government, IoT...
videomedianamethatissuperlongname.pdf	Video	2	0	Customer Media	Automotive, Government, IoT...
videomedianamethatissuperlongname.pdf	PDF	8	5	Related Media	Automotive, Government, IoT...
backgroundmedianame.pdf	PDF	4	4	Related Media	Healthcare
videomedianamethatissuperlongname.pdf	Video	12	8	Customer Media	Healthcare

Media Metrics include customer &amp; related media + export!

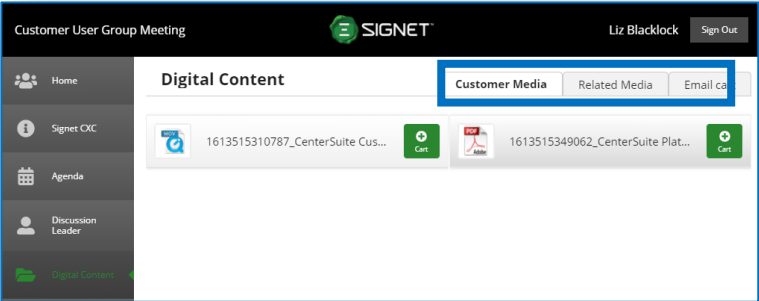


# Feature Updates



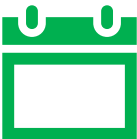
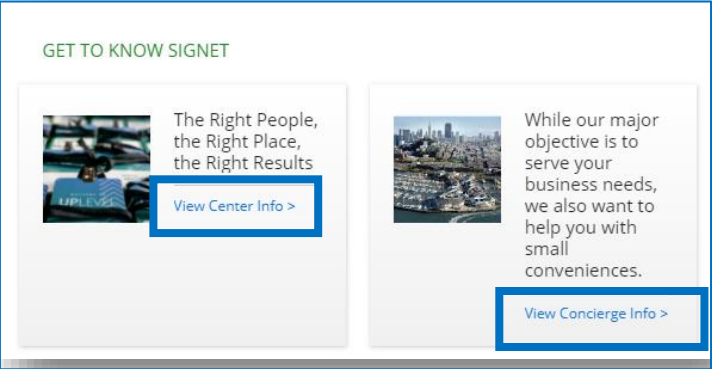
## Media Tab Updates

Consolidate the Media Tab



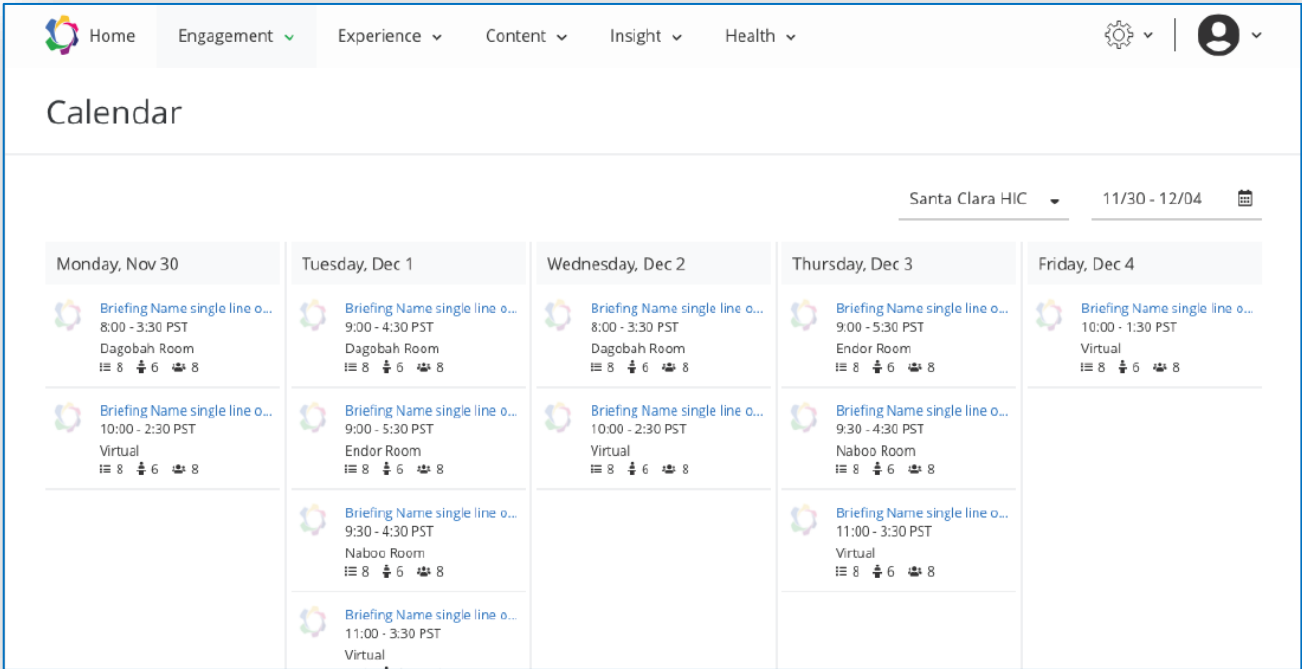
## Home Tab Updates

Change both text to "View Info"



## Briefing View Updates

New calendar view



# Virtual Room Warmer – New & Improved Features



**Countdown timer**  
5-minute increments



**Pause, Forward, Reverse slide options**



**Background image**  
Edit or add background imagery



**Additional Content Slides**  
Add different types of content



**Quick Use options with save/edit mgmt.**  
Create a quick use Virtual Room Warmer

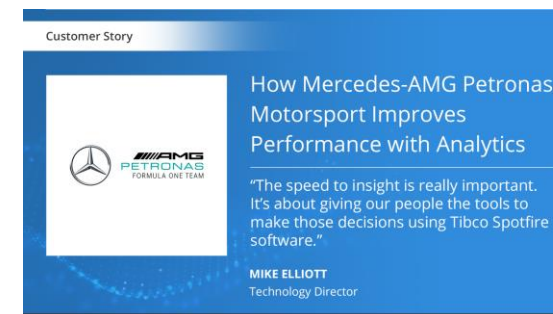
## General Content



## Industry Content



## Customer Stories



## Leadership Content



# CE App // Roadmap – Virtual Welcome Enhancements



Planning for April release.  
Optional Twitter Widget on Client Welcome View.  
Expandable Agenda Topics.

9:42am PST

Resumes in: 04:59

Welcome

Bank of America

Information Technology

3rd line of text

Hitachi Vantara

@hitachivantara

Twitter

Big news: @HitachiPG is joining forces with #Lumada. The new integrated portfolio will help clients move from the industrial age to the #digital age. Get the details here: [#ScaleDigital](https://htchivantara.is/2Mrm7kE)

9:42am PST  
12:42am EST

Thursday, Dec 3rd Agenda

TIME	AGENDA	DISCUSSION LEADER
9:00am PST (12:00pm EST)	Greeting & Introductions	
9:15am PST (12:15pm EST)	Voice of the Customer	
10:00am PST (1:00pm EST)	Current Platform Overview	
11:00am PST (2:00pm EST)	Next Generation Implementations for Blockchain Analytics and Artificial Intelligence	Jane Doe
12:00pm PST (3:00pm EST)	Lunch Break	
1:00pm PST (4:00pm EST)	Specialized Offering Demonstrations	John Doe

9:42am PST  
12:42am EST

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9:00am PST (12:00pm EST)	Greeting & Introductions	
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10:00am PST (1:00pm EST)	Current Platform Overview	
	This text will be the description text. Lorem ipsum dolor sit amet, consectetur adipiscing elit. Duis sed bibendum est. Cras bibendum odio congue, faucibus leo sit amet, finibus dui. Donec condimentum ligula nec elit feugiat rhoncus. Sed in cursus risus, a consectetur ex. Ut mollis porta sem nec dignissim. Proin et lectus ac lacus semper tempor.	
	<div><div><div>John Doe Director of Product</div></div><div><div>Jane Doe Senior Product Manager</div></div></div>	
	<div><div><div>Johnathan Smith Chief Technology Officer</div></div><div><div>Kristina Asher Chief Executive Officer</div></div></div>	
11:00am PST (2:00pm EST)	Next Generation Implementations for Blockchain Analytics and Artificial Intelligence	Jane Doe



# CE App // Roadmap – Additional Briefing Time Zone



Planning for April release (or sooner).  
If your scheduling system has a briefing-specific, additional time zone.

Bank of America

Johnathon Smith

Sign Out

Home

Center Info

Agenda

Feedback

Discussion Leaders

Media

Concierge

Home

Current Agenda Item

9:00am - 9:15am PST | Greetings & Introductions  
(12:00pm - 12:15pm EST)

Description

Discussing broad cloud portfolio options using self-service infrastructure with instant deployment on a leading-edge platform with managed services.

Discussion Leader

John Doe  
Director of Product

VIEW BIO →

Rate Discussion Leader

Please rate your satisfaction with the speaker's presentation.

1 of 2 >

Not at all

2

3

4

5

6

7

8

9

Excellent

Next Agenda Item

9:15am - 10:00am PST | Voice of the Customer  
(12:15pm - 1:00pm EST)

View agenda item details >

HOST DETAILS

Wednesday, Feb 19th  
9:00am to 4:30pm PST  
12:00pm to 7:30pm EST  
Executive Briefing Room

Join Video Conference

View Details ▾

Briefing Manager:  
Jane Doe

Contact for assistance

QUICK LINKS

Visit Our Website

View Related Media

9:42am PST  
12:42am EST

Thursday, Dec 3rd Agenda

TIME	AGENDA	DISCUSSION LEADER
9:00am PST (12:00pm EST)	Greeting & Introductions	
9:15am PST (12:15pm EST)	Voice of the Customer	Johnathan Calovich, John Doe
10:00am PST (1:00pm EST)	Current Platform Overview	Kristina Asher, Jane Doe, +2
11:00am PST (2:00pm EST)	Next Generation Implementations for Blockchain Analytics and Artificial Intelligence	Bryan Mohr
12:00pm PST (3:00pm EST)	Lunch Break	
1:00pm PST (4:00pm EST)	Specialized Offering Demonstrations	David Aligo
2:30pm PST (5:30pm EST)	System Integration Planning	Tabatha Davis
4:00pm PST (7:00pm EST)	Briefing Wrap-up	
5:00pm PST (8:00pm EST)	Closing Message	
5:15pm PST (8:15pm EST)	Thank You	

# CE App // Roadmap – Weekly Debrief Email



Planning for April release.  
A weekly Friday email coming out around noon  
(your local center time).

HomeEngagementExperienceContentInsightHealth

Preferences

More email information and options will be available in future updates. Stay tuned.

Receive Weekly Debrief Email

Yes

Save

Cancel

← Only a simple yes/no to receive the email, but more preference options in the future.

Message

DeleteArchive

ReplyReply AllForwardAttachment

Meeting

MoveJunkRules

Move to OtherRead/UnreadCategorizeFollow Up

Send to OneNote

Insights

Your Weekly Debrief

Hi James,

Here's the weekly debrief for Santa Clara Center.

This Week's Recap:

PAN - Cloud Security Data Infrastructure

Mon, Feb 8 | Evaluations Received: 8

IBM - Blockchain Analytics Management

Wed, Feb 10 | Evaluations Received: 4

VMware - Digital Security Artificial Intelligence

Thu, Feb 11 | Evaluations Received: 2

Next Week's Briefings:

Cloudera - Data Management

Tue, Feb 16 | 09:00 - 03:00 | Executive Briefing Room A

Tesla - Next Generation Lithium Technology

Wed, Feb 17 | 08:00 - 11:00 | Virtual

Thu, Feb 18 | 10:00 - 3:00 | Virtual

AAA - Essential Smarter Cloud Security

Wed, Jan 17 | 11:00 - 04:30 | Executive Briefing Room B

New Upcoming Briefing Requests

Cisco - Quantum Hybrid Evolution of Cloud

Mon, Mar 8 | 08:30 - 03:30 | Executive Briefing Room A

Apple - AI Powered Data Analysis

Thu, Mar 18 | 10:00 - 04:30 | Virtual

UnitedHealth Group - Performance Optimization and Powerful Distribution

Wed, Apr 7 | 09:00 - 04:30 | Executive Briefing Room C

CONFIDENTIAL & PROPRIETARY

PAGE 13



# Upcoming Programs



## UPEVEL VIRTUAL CUSTOMER BRIEFING SERIES

Uplevel is a quarterly thought leadership forum. Signet brings together best and brightest from across the enterprise customer engagement space, for a moderated discussion on industry trends.

Next Webinar:

**MARCH 25<sup>th</sup>,  
2021**

**11:00 AM PST**



28<sup>th</sup> Annual ABPM Conference

April 19 – 22, 2021

We hope to 'see' you there!