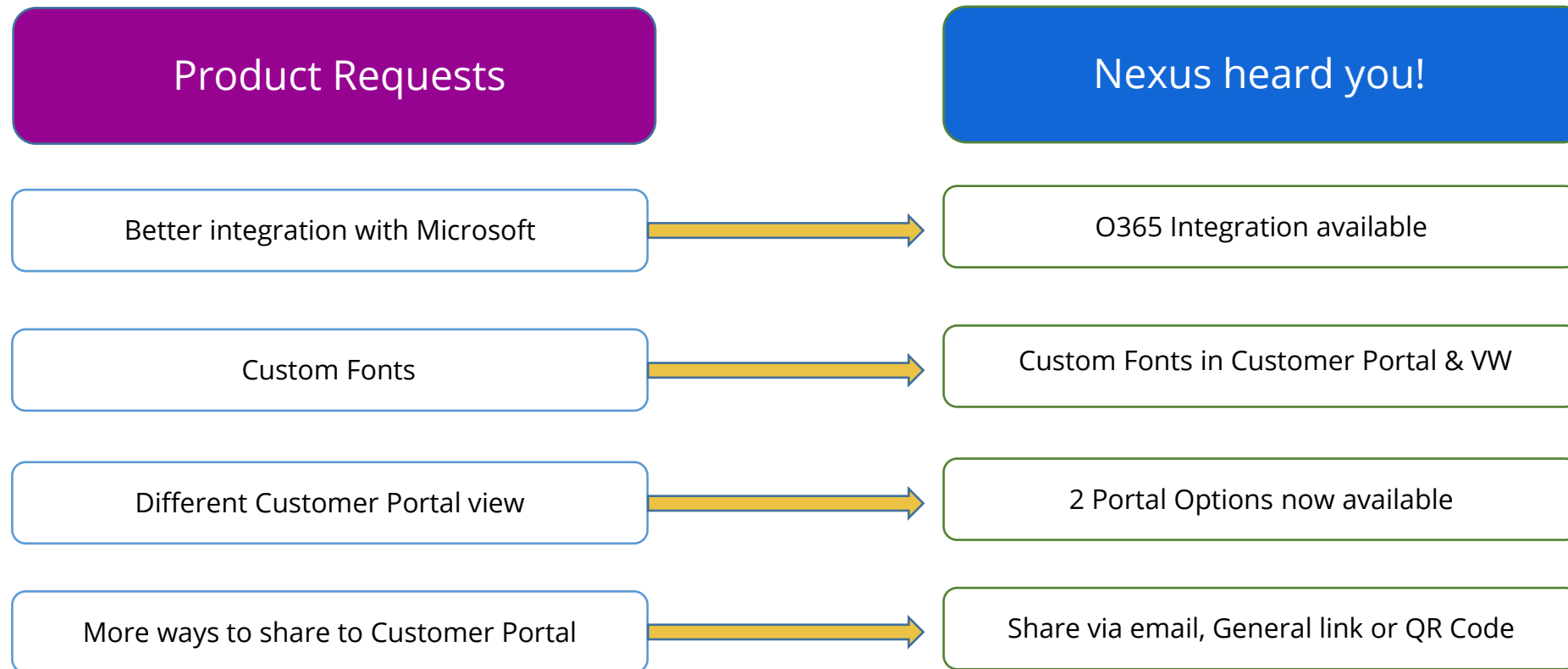




Challenges and Solutions



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



Nexus Hub Feature Summary



Features

- General Access: Sharing the Customer Portal
- Fonts: Assign corporate font to Portal and VW
- Customer Portal: New Profile Options
- Engagement Reports: Planning and Wrap Up Reports
- Program Site: Global and Center
- Virtual Welcome: Music Options

KEY HIGHLIGHTS

Sharing via General Access



The CenterSuite Platform now offered General Access
URL (or QR codes)

ACCESS : BRIEFING OVERVIEW

Get General Access Link (same access point)

- Copy Shareable Link
- View QR Code (download or copy)

Get General Access Link
Copy Sharable Link | View QR Code

Send Meeting Invite

Share CE App Access

Print Agenda

Print Attendees Seat Tents

The screenshots illustrate the user experience for accessing the Signet platform. The first screenshot shows the 'Please Choose Your Name' screen with a list of names, including 'L. Blacklock', which is highlighted with a red box. The second screenshot shows the 'Please Enter Your Email Address' screen, where the email address 'liz.blacklock@signet.tv' is autofilled from the scheduling tool, as indicated by a green callout box. The third screenshot shows the 'Signet Customer Experience Center' dashboard, which includes a 'Welcome Liz' message, a 'Next Agenda Item' section, and a 'Feedback' link. A green callout box points to the 'Feedback' link with the text 'More feedback opportunity'. The dashboard also features a 'Personalized CE App' button and a 'Sign Out' button.

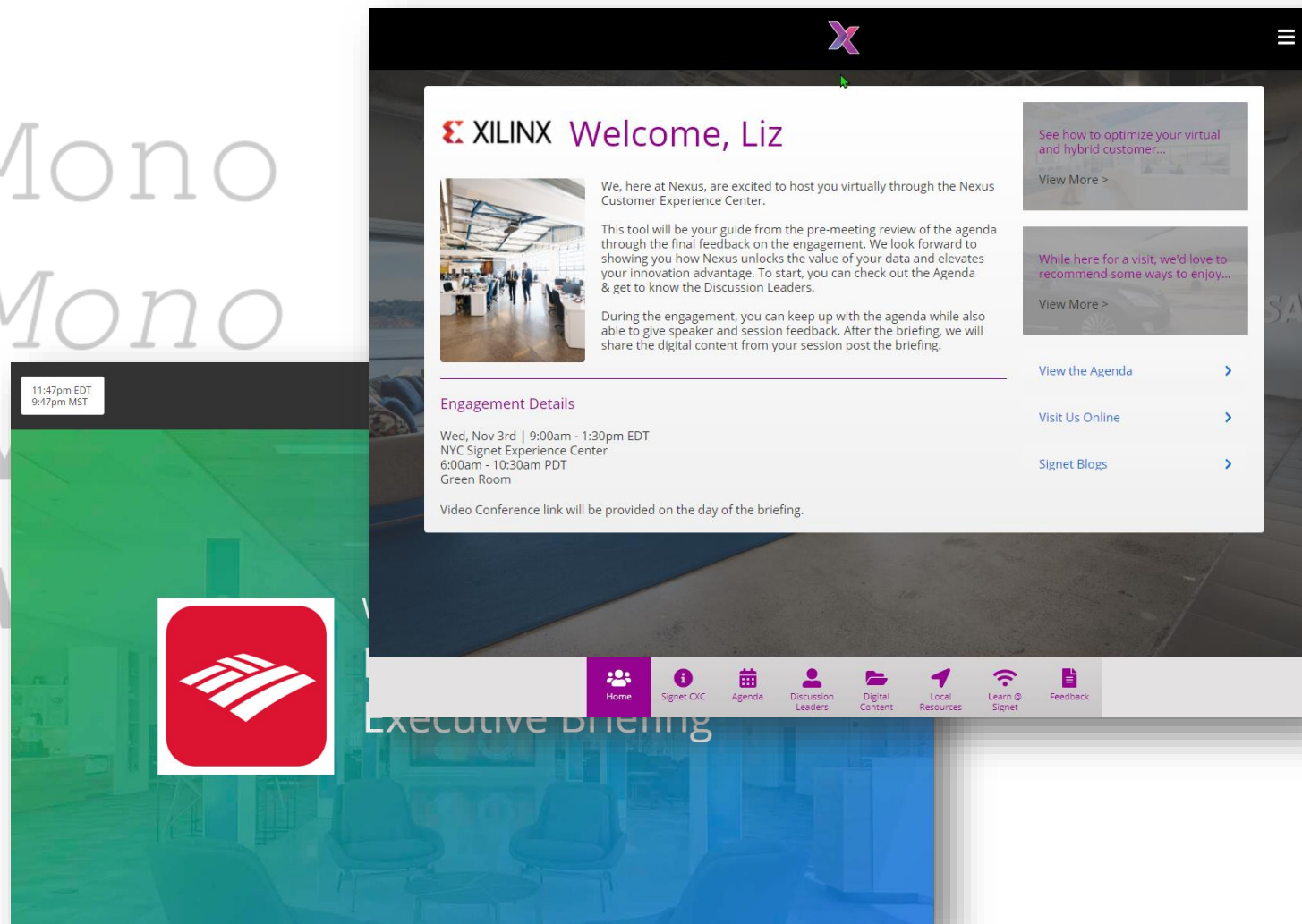
KEY HIGHLIGHTS

Nexus Platform: FONTS

CUSTOMIZE THE FONT FOR THE CUSTOMER PORTAL & THE VIRTUAL WARMER

Email your CSM with the font file!

Serif Sans Mono
Serif Sans Mono
Serif Sans M
Serif Sans M

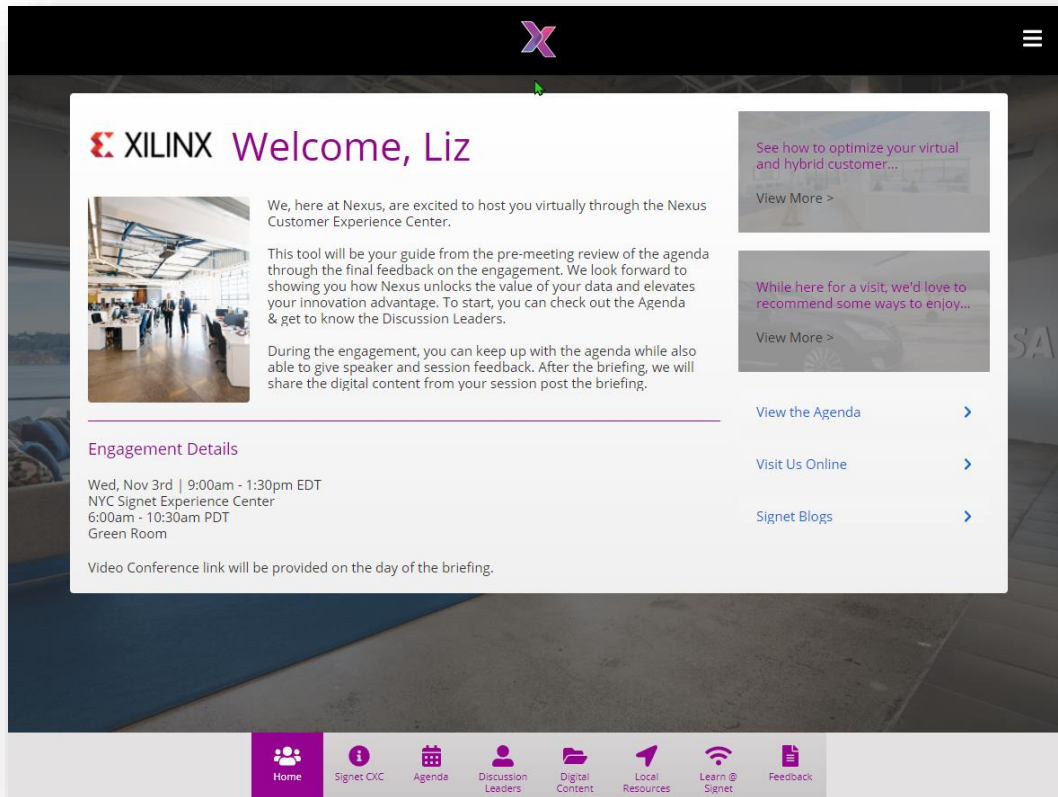


Customer Portal: New Profile

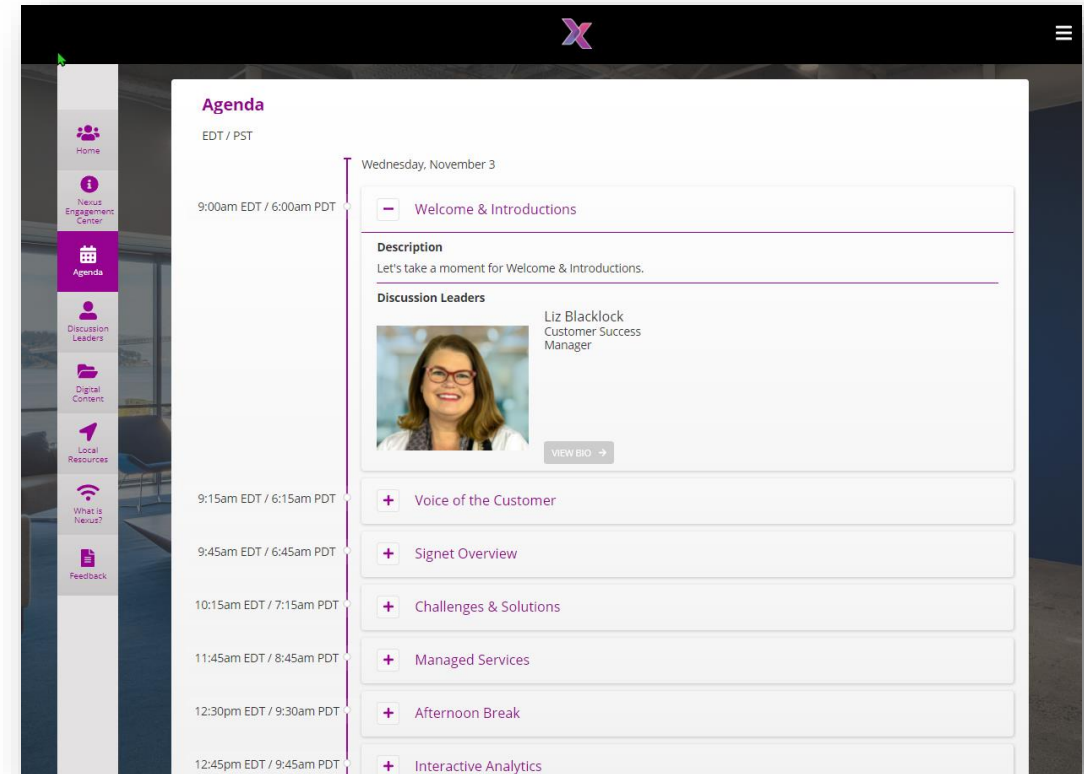


Center setting for Customer Portal views

- **Profile A: New style**
- Profile B: Existing style (default)



Profile A: Bottom Nav



Profile A: Left Nav

NYC Signet Experience Center
Planning Report

Engagement

Customer
Name

Internal
Name
Liz Black
Bryan Nu

Voice of
Internal
Discuss

Signet C
Internal
Discuss
Shankar

Nexus F
Internal
Discuss
Stacy W

Supply
Internal
Discuss
Marshall


Manage
Internal
optimiz
Discuss
Rebecca

nexus

NYC Signet Experience Center
Planning Report

NYC Signet Experience Center
Planning Report

Engagement Details

 Xilinx
Xilinx

NYC Signet Experience Center | Green Room
Thu, Nov 11 | 5:00 am - 11:30 am


Opportunity Details

Name: Xilinx Workspace Sites | ID: 2384f8dfd6f9
Amount: \$750,000 | Probability: 80% | Close Date: 12/31/2021
Notes: Sed ut perspiciatis unde omnis iste natus error sit voluptatem accusantium doloremque laudantium, totam rem aperiam, eaque ipsa quae ab illo inventore veritatis et quasi architecto beatae vitae dicta sunt explicabo.

Account Details

CRM ID: N/A
Revenue: N/A
Industry: Retail
Description: N/A

nexus | Accelerating Opportunities

 nexus

The collage features several overlapping document cards from the NYC Signet Experience Center. The cards display various reports and engagement details:

- Engagement Report:** Includes sections for Customer Attended, Internal Attendee, and Agenda - Friday, October 22. It lists participants like Mary Davis, Geddy Lee, Brett Bolling, and John Higgins, along with discussion leaders like Marshall Thompson and Shankar Sahai.
- Engagement Details:** Features the Xilinx logo and details about the event on Friday, October 22, at 5:00 am - 11:30 am in the Blue Room. It includes a section for Voice of The Customer Notes and Wrap-up Notes.
- Customer Attended:** Lists participants such as Mary Davis, Geddy Lee, Brett Bolling, and John Higgins.
- Internal Attendee:** Lists participants like Liz Blacklock and Bryan Nunes.
- Agenda - Friday, October 22:** Includes sections for Welcome & Introduction, Voice of the Customer, Signet Overview, Nexus Platform Kick-off, Supply Chain & Operations, and Managed Services.

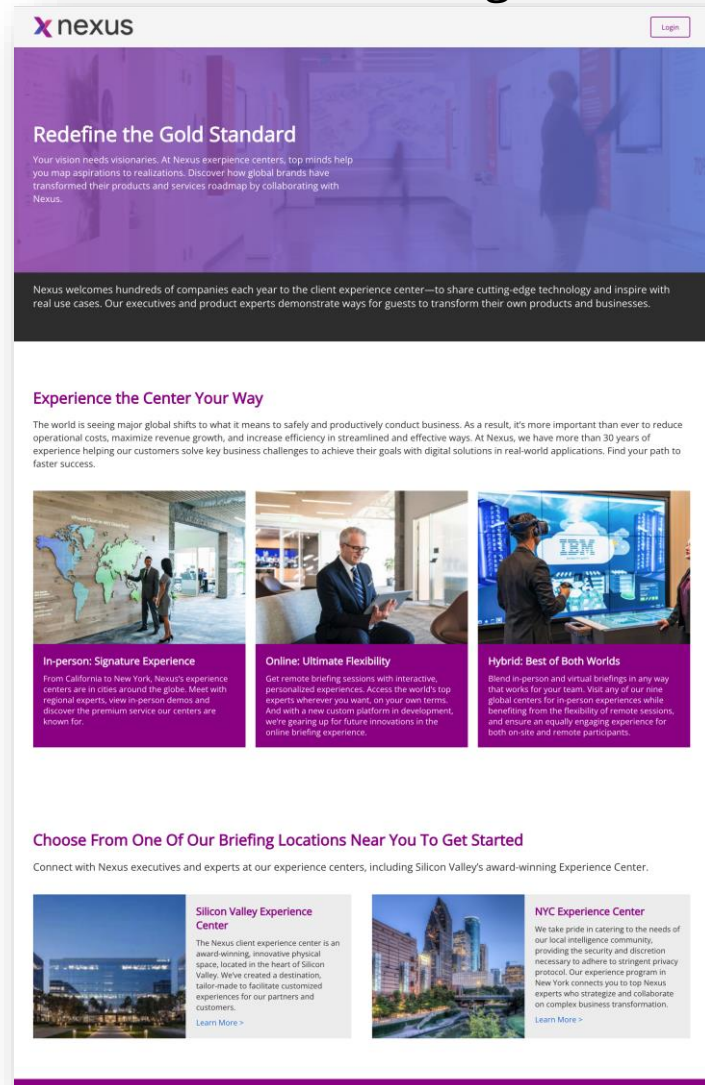
The cards are layered, with some partially obscured by others, creating a sense of depth and showcasing multiple aspects of the engagement report.

Nexus Platform: Program Sites

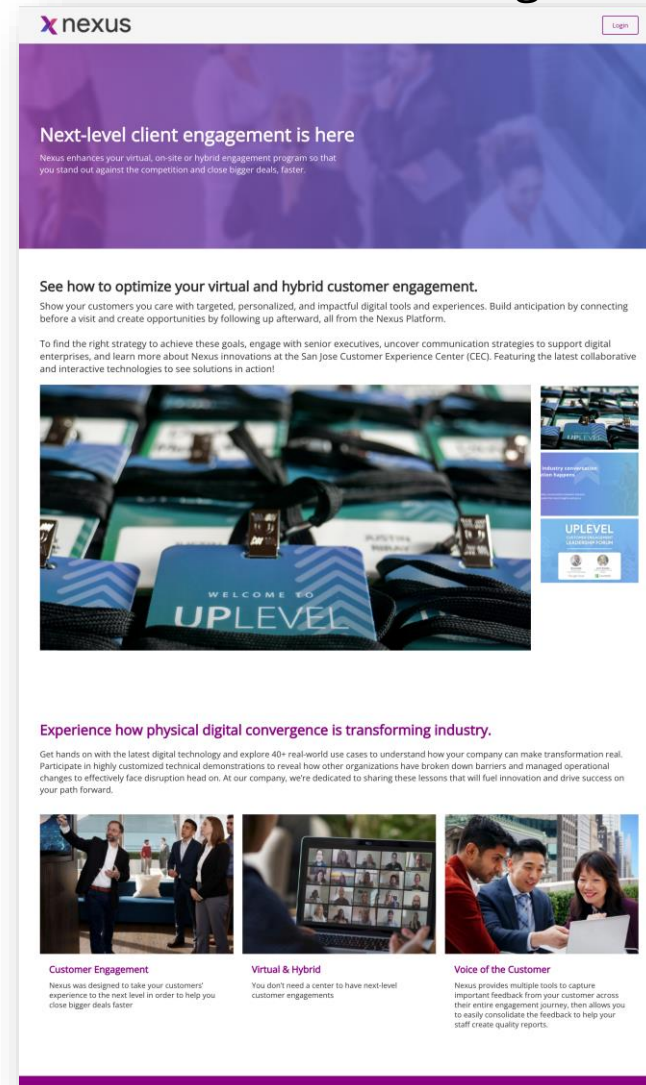


Global Home Page

The Program Site is a public website experience for you to showcase your program and each center's offerings and specialties. This can help explain the program and value more to the Sales team and also for Sales reps to pass along to their customers. Information per each center can easily pull from your current center info media and information but you can choose to enter custom content and highlights as well.



Center Location Page



Virtual Welcome: Music

Add music to your Virtual Experience

Control the music here!

Current Musical Options (by Center)

- Clarion Full
- Clarion
- Decide
- Freedom Run
- Fresh Commerce
- Technology
- Upstart

Center
NYC Signet Experience Center

View Duration (sec) *
15

Show Time in Header
☒ On

Show Secondary Time
☒ On

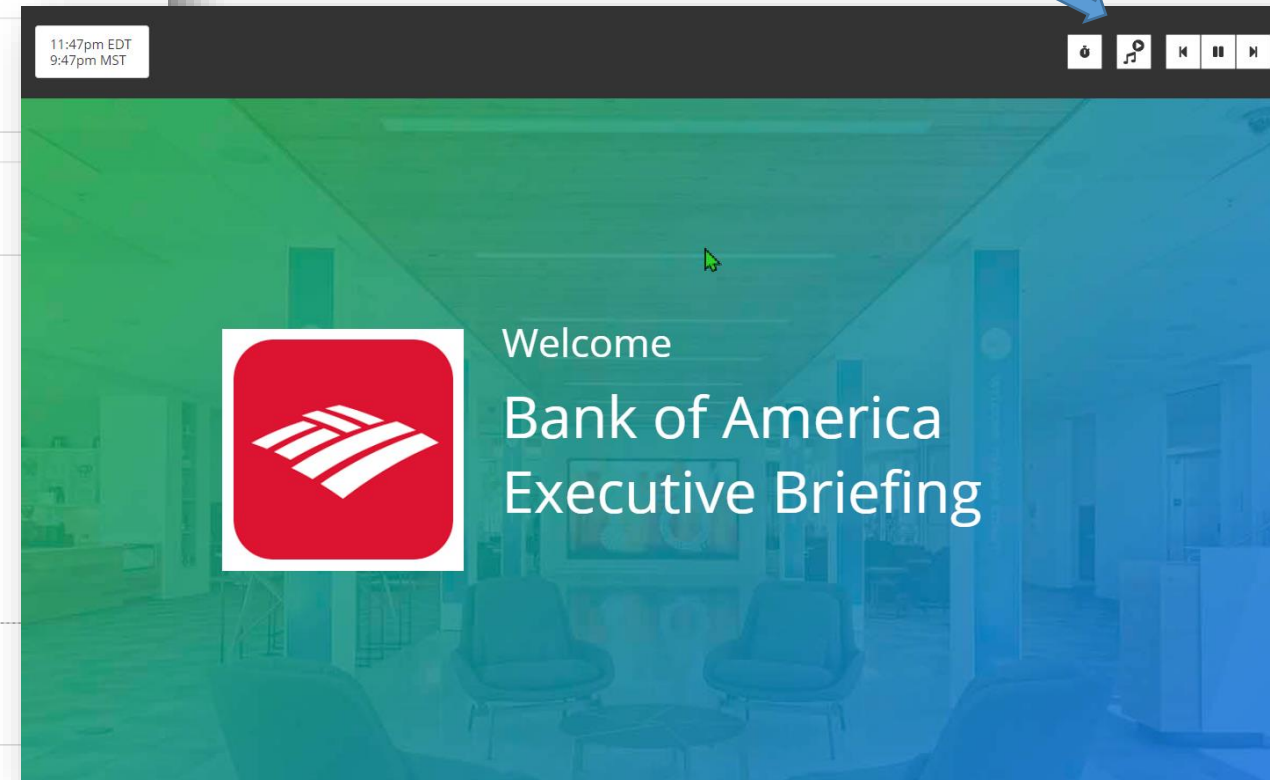
Show Music in Header
☐ Off

Audio

Speaker Label *
Discussion Leader

Show Speaker Headshot
☒ On

Default Additional Media



Open Discussion – Logistics



Catering/Hospitality



Planning

Logistics

What are the core needs around logistics?



Transportation / Lodging



Gift/Billing

Coming in December Release:

- Platform Hub – Engagement Attendee Batch Entry
- Platform Hub – Engagement Facilitation Fields for Logistics (i.e., catering, transportation, etc.)
- Virtual Warmer – New Playback Tab (for media)
- Customer Portal – Custom Content Tab Sections (similar to Concierge tab)
- Customer Portal – Direct Hyperlink to Feedback Tab (emailable link)
- Customer Portal – Custom Tab Icons (upload vs select from our list)

Possibly in December ... or in Q1:

- Platform Hub – Home Page Enhancement (adding reporting highlights)
- Platform Hub – Discussion Leader Batch Entry
- Platform Hub – Global Header Search Functionality
- Program Site – Request Briefing Button Option

Roadmap – Attendee Batch Entry



New feature to 'Add Multiple' attendees at once.
First step is to easily past in multiple attendees, and in future, upload a CSV.

Search

Actions

Add Attendee

Add Multiple

CUSTOMER PORTAL LINK

INVITE STATUS

ACTIONS

Accepted

Remove

Hub Engagement Experience Content Insight Health

Search

Attendee Details

Attendee Type*	First Name*	Last Name*	Company*	Email	Job Title	Level	Role
External	Daniel	Shaw	Bank of America	dshaw@boa.com	Product Lead		
External	Anna	Wu	Bank of America		Product Manager		
External	Carina	Miller	Bank of America	cmiller@boa.com	VP Product	Vice President	Decision Maker
External	John	Casey	Bank of America	jcasey@boa.com	Director of Product	Director	Influencer
External							
External							
External							
External							
External							
External							
External							

Add 10 more rows

FUTURE: Speakers in Batch

Hub Engagement Experience Content Insight Health

Search

Speaker Details

First Name*	Last Name*	Photo	Email*	Job Title	Bio	Center*
Johnathan	Smith		jsmith@email.com	Director of Product	Lorem ipsum dolor sit O	Santa Clara Center
		<div>Upload</div>				
		<div>Upload</div>				
		<div>Upload</div>				
		<div>Upload</div>				
		<div>Upload</div>				
		<div>Upload</div>				
		<div>Upload</div>				
		<div>Upload</div>				
		<div>Upload</div>				

Add 10 more rows

Save

Cancel

Roadmap – Facilitation Logistic Notes



We're adding more logistic notes for engagements as a first step. In the future, it will be more configurable for your program-specific needs.

The screenshot displays the Nexus application interface. At the top is a navigation bar with tabs: Hub, Engagement (selected), Experience, Content, Insight, and Health. To the right of these tabs are a search bar, a notification bell, a settings gear, and a user profile icon. Below the navigation bar, the main header area shows a BoA Mainframe Cloud Infrastructure logo and an Actions dropdown menu. On the left side, there is a sidebar menu with options: Overview, Agenda, Attendees, Facilitation (highlighted), Impressions, Evaluations, and Wrap-up. A 'More' link with a downward arrow is at the bottom of the sidebar. The main content area is titled 'Engagement Logistics' and contains three sections for notes: 'Engagement Notes', 'Meal & Catering Notes', and 'Travel & Transportation Notes'. Each section has a toolbar with icons for Bold (B), Italic (I), Underline (U), and Link (chain icon), followed by a text input field with a placeholder 'Enter [Section Name] Notes...' and a double-slash icon for formatting. A fourth section, 'Culture & Translation Notes', is partially visible at the bottom.

Roadmap – Direct Feedback Hyperlink



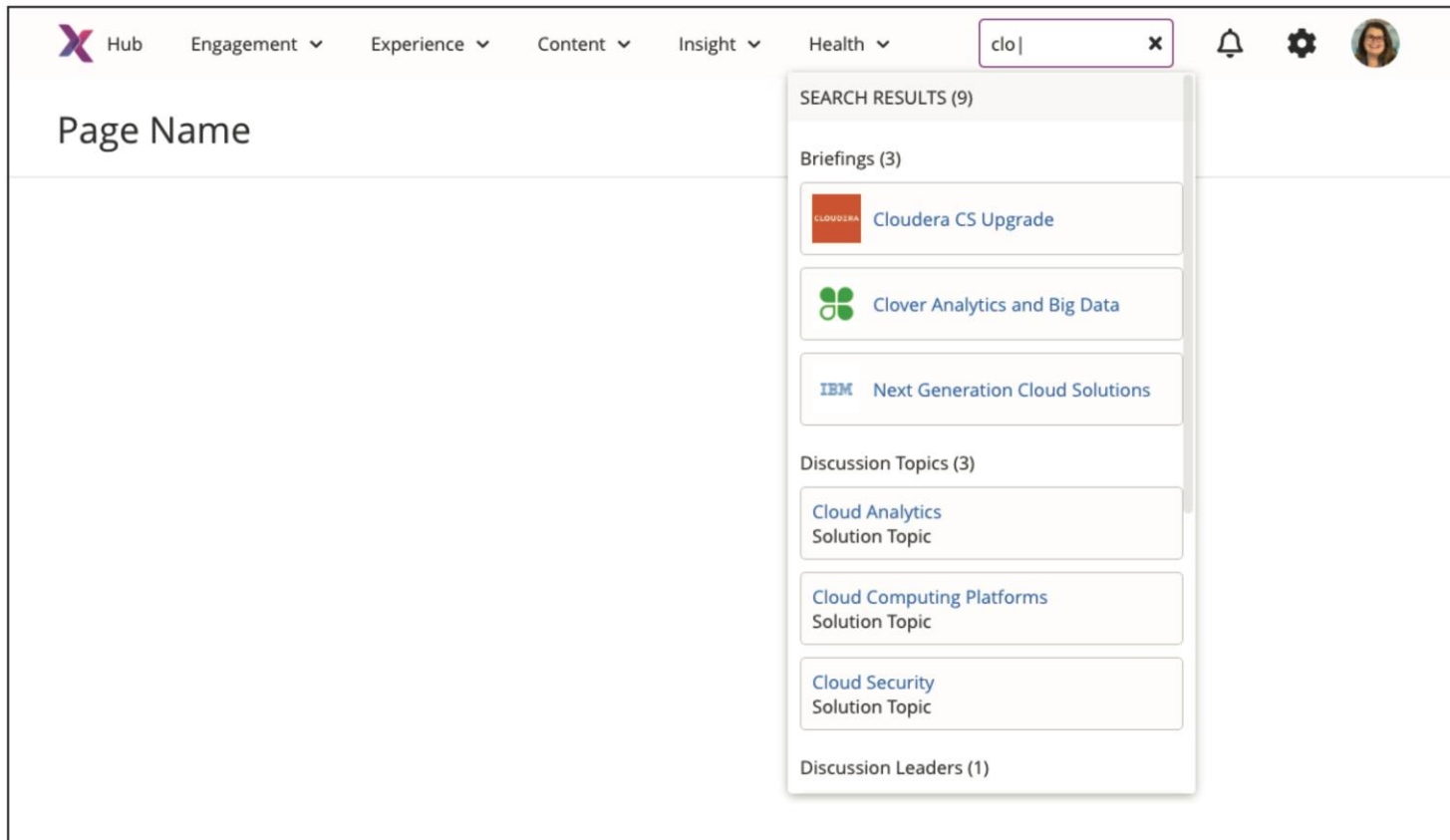
We're adding in a direct link for attendees to open the Customer Portal on the feedback tab. This link can be included in any email template.

A screenshot of the 'Post-Engagement Email Preview' interface within the Nexus Hub. The interface has a top navigation bar with tabs for Hub, Engagement, Experience, Content, Insight, and Health. A search bar and user profile icon are on the right. The main content area is titled 'Post-Engagement Email Preview' and contains a form for editing an email. The form includes a 'Preview and edit the email to be sent.' section with a text box for 'Email Subject*' containing the placeholder text '{{tenant.name}} - Post-Engagement Feedback'. Below this is a 'Body Text*' section with a rich text editor. The editor's toolbar includes buttons for Bold (B), Italic (I), Underline (U), and Link (chain icon), followed by a 'Components' dropdown menu which is highlighted with a red box. The email body text reads: 'Dear {{attendee.firstName}},
Thank you for sharing your valuable time with us, to not only learn more about {{tenant.name}} but to give us a glimpse into the challenges you face so we can continue with our mission.
We would love to hear from you about your briefing experience, please click on the link to provide us your feedback.
[Evaluation Survey](#)
Sincerely,
{{center.name}}'. At the bottom of the form are 'Save' and 'Cancel' buttons.

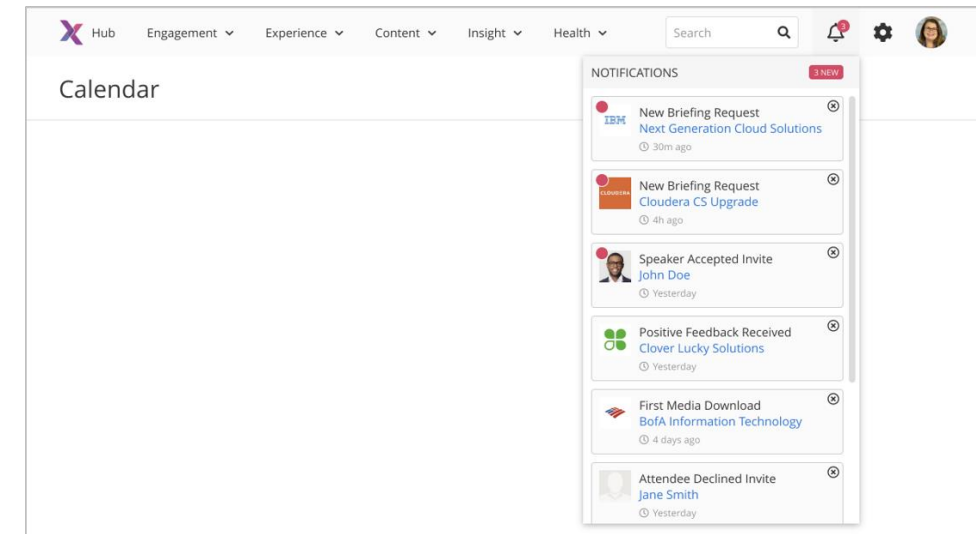
Roadmap – Header Global Search



We're adding the search feature to the Hub header for easy anytime search.
First search areas: briefings, agenda topics, and speakers.



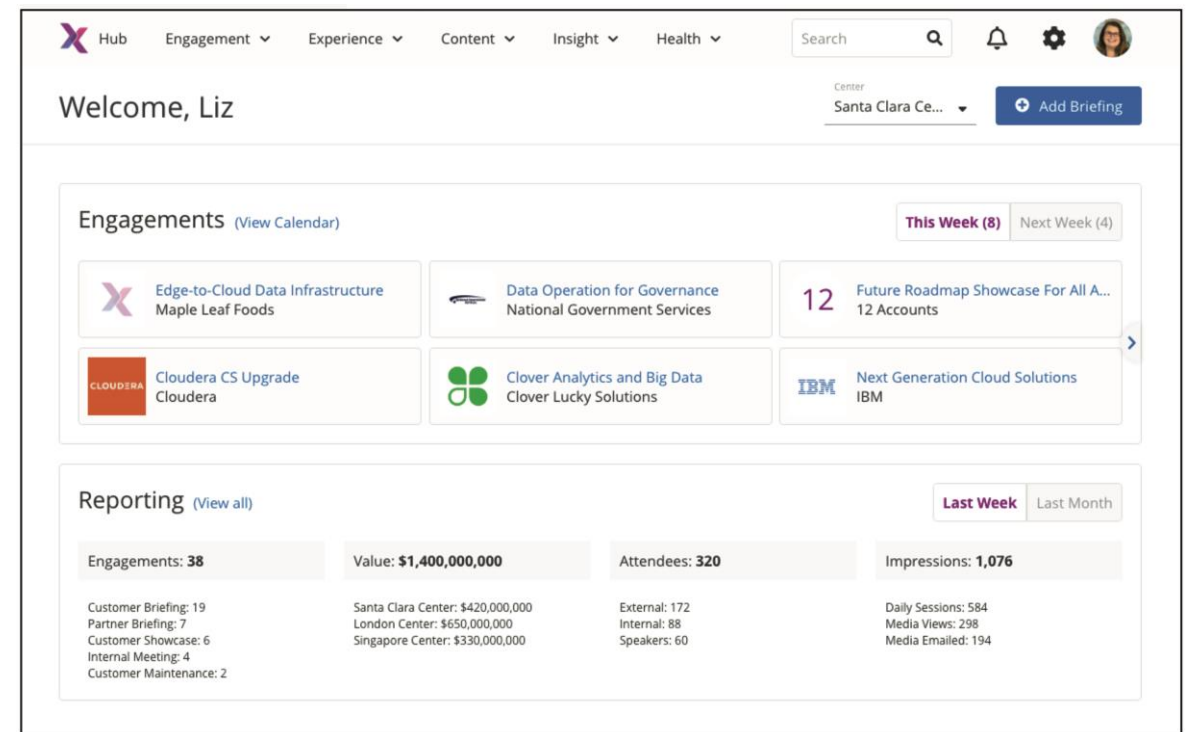
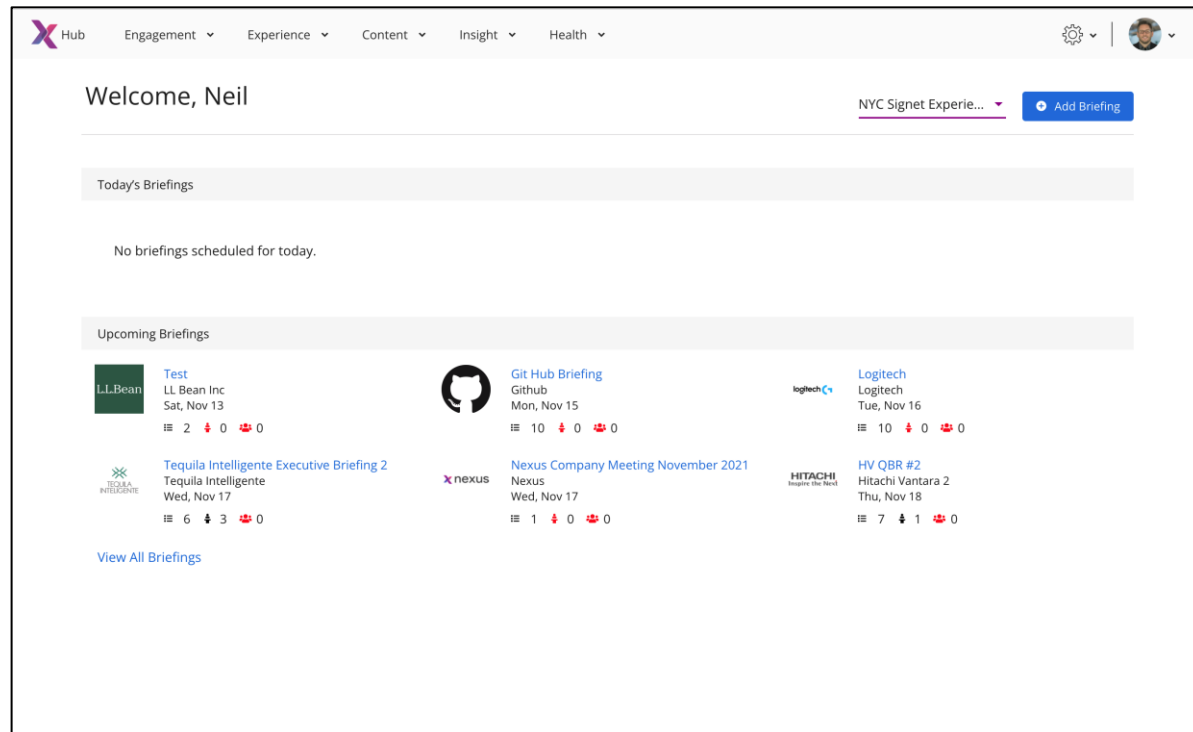
FUTURE: Header Notifications



Roadmap – Home Page Enhancement



We're adding more insight to the home page by adding reporting highlights to the bottom area.
In the future, we're looking to make this more customizable by user.
What do you want to see on the home page?



Thank You!

Q4 UPLevel Q4 Webinar
Date: Dec 2, 2021
Topic: Program Insight Measurement and Reporting



Scan me register!

UPEVEL

CUSTOMER ENGAGEMENT LEADERSHIP FORUM

Program Insight Measurement and Reporting:
How world-class programs are gathering and preparing data for leadership reporting

Thursday December 2nd, 2021 11 AM PDT / 2 PM EDT

Virtual Webinar

x nexus

MARSHALL THOMPSON
Director & Host

JOE PERRY
Sr. Manager, Global Customer Briefing Program
AUTODESK

ANITA PENDERS
Global Lead, Customer Engagement Center Operations
fs

STACY CUMMINGS
Director, Marketing Events & Customer Programs
verizon

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Join our Nexus Platform User Group!

*Next Meeting: Q1 2022
11AM PST / 2PM EST*

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success@Nexuscenter.io