



Customer Engagement Application User Group

Agenda

- Success & Challenges
- New Features
- Product Roadmap
- Wrap Up

Success



Liz Blacklock

Customer Success Manager



Shankar Sahai

Sr. Director, Client Success

Product



Neil Rieger

Director, Product Design



NTT DATA



HITACHI
Inspire the Next

FORTINET

Challenges & Successes

CHALLENGES

- Driving clients to give feedback
- Speakers images and Bio incomplete
- Speaker Bio from BriefingSource is text only
- Customizing per briefing type, such as, salutations, evals and media
- Time zone challenges for virtual briefings

SUCSESSES

- Polished consistent presentation to clients
- Manage zoom URL inside of App
- Evaluations are value add
- Branded experience, manageable at the client level with no photoshop

CE App – New Features // Global Settings

NOV 2020 RELEASE

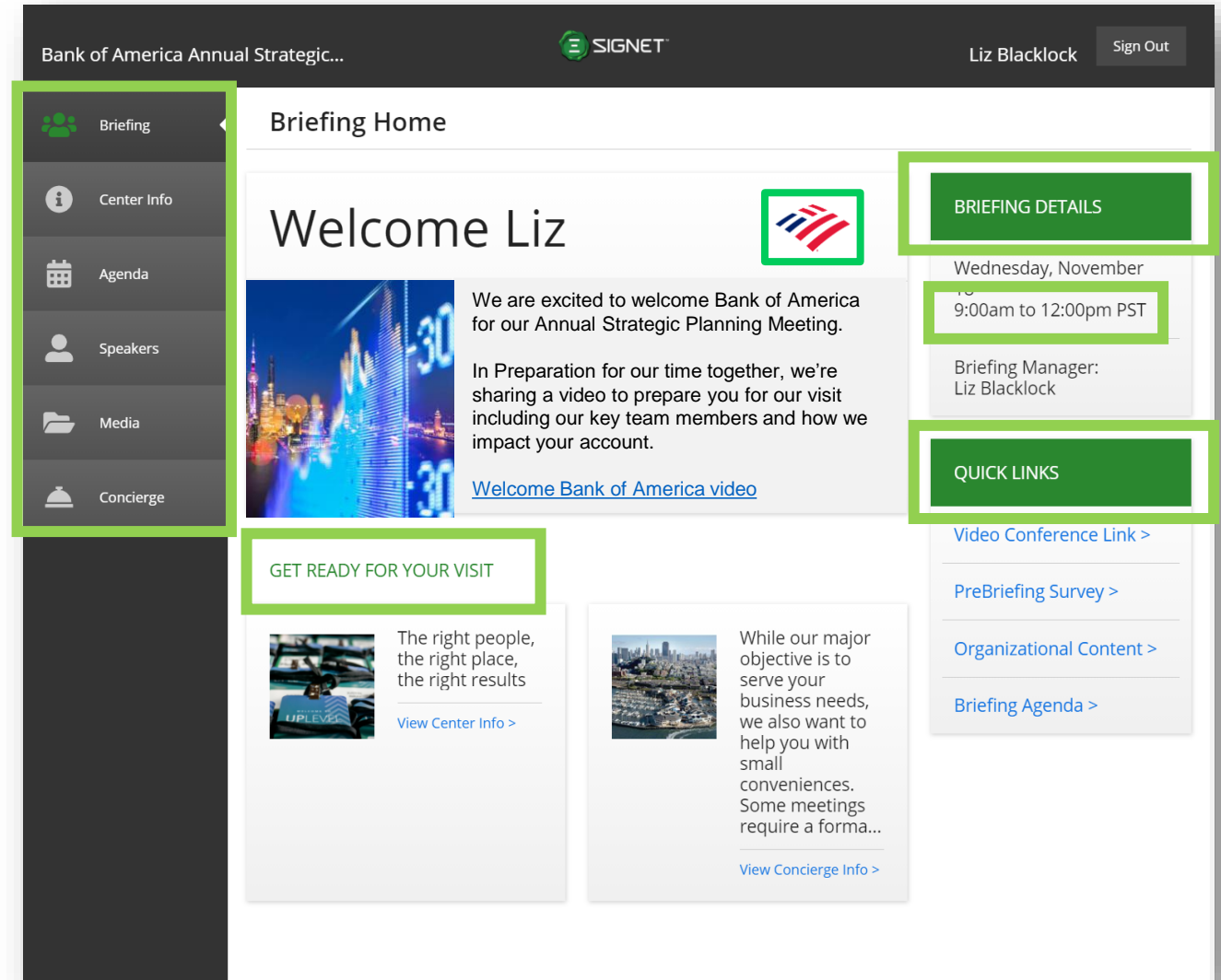
- A. Text is **formattable + hyperlinks**
 - *Center Info, Salutations, Leadership Bios*
- B. Enable **Client Logo** on BRIEFING HOME PAGE
- C. CE App Tab Mgmt.
 - Re-order
 - Re-name
 - Add new (*url only*)
- D. Inside tabs eliminated on **MEDIA & FEEDBACK**

Briefing Media

Related Media

Agenda Topics

Briefing
- E. Briefing **Time Zone** shown in Briefing Detail pod
- F. Change the word **BRIEFING** throughout the app
- G. Rename the **BRIEFING DETAILS** & **QUICK LINKS** pods
- H. Change the “Get Ready For Your Visit” & “Thank You” text



CE App – New Features // Email Function

NOV 2020 RELEASE

Use Case: I need a quick method to send customer communications outside of BriefingSource.

CS Platform Home Page → [View Active Briefings](#)

Select Briefing → On Overview – choose *Share CE App Access Link*

Select the attendees →
Edit text as desired →
Sends personalized URL

PRESET EMAIL TEMPLATES

[CE App Access Link Email](#)

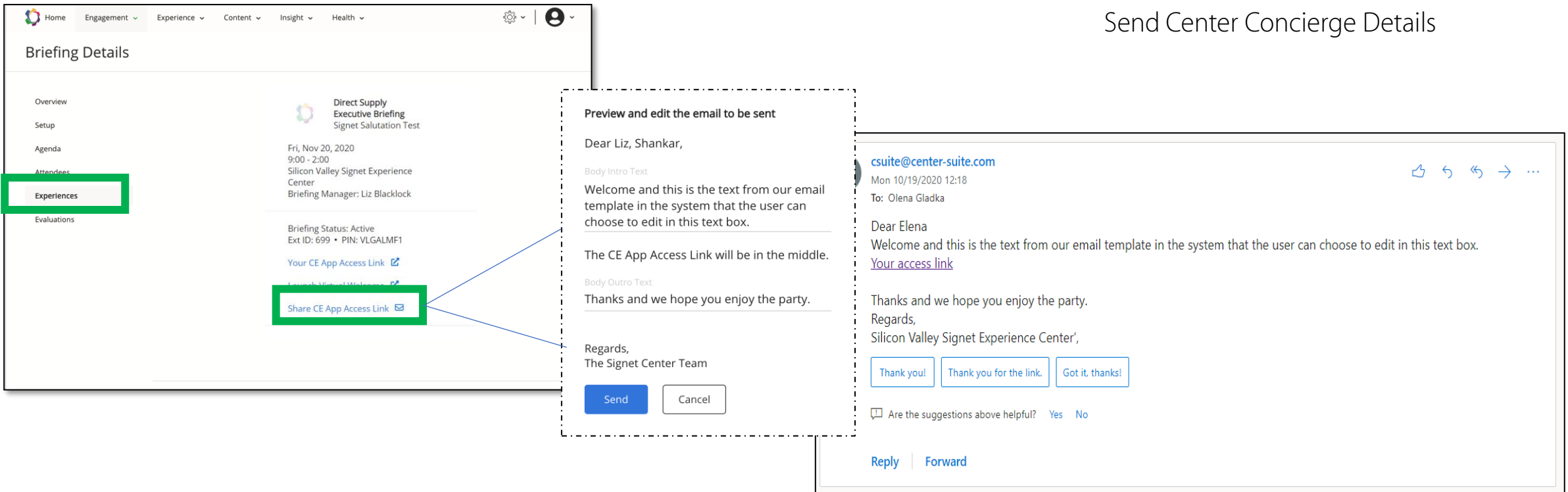
[Direct Access External](#)

[Direct Access Internal Send Media](#)

[Send Message to Speaker](#)

[Send Center Brochure](#)

[Send Center Concierge Details](#)



The screenshot displays the 'Briefing Details' page in the CE App. The 'Experiences' tab is selected in the left sidebar. The main content area shows details for a 'Direct Supply Executive Briefing' on Friday, Nov 20, 2020, from 9:00 to 2:00. The briefing manager is Liz Blacklock. The 'Briefing Status' is Active, with Ext ID: 699 and PIN: VLGLMF1. A 'Your CE App Access Link' is provided. A 'Share CE App Access Link' button is highlighted with a green box. A modal window titled 'Preview and edit the email to be sent' is open, showing a preview of the email. The email is addressed to 'Dear Liz, Shankar,' and includes a personalized URL. The modal also shows the 'Send' and 'Cancel' buttons. The email preview shows the sender as 'csuite@center-suite.com' and the recipient as 'Olena Gladka'. The email body includes a welcome message and a link to the CE App. The preview also shows the 'Thank you!' button and the 'Are the suggestions above helpful?' feedback prompt.

CE App – New Features // Briefing Personalization (cont.)

NOV 2020 RELEASE

Use Case: I want to personalize the experience for this briefing

Simple steps:

- CS Platform Home Page →
- Select a briefing to personalize
- Click Experiences

Expose & Rename tabs


[View Active Briefings](#)


Add Briefing Specific Media


Application Tabs		
ORDER	TAB NAME	PAGE TITLE
1	Home	Home
2	Center Info	Center Info
6	Media	Media
7	Concierge	Concierge

[Save](#) [Cancel](#)

CE App Briefing Media

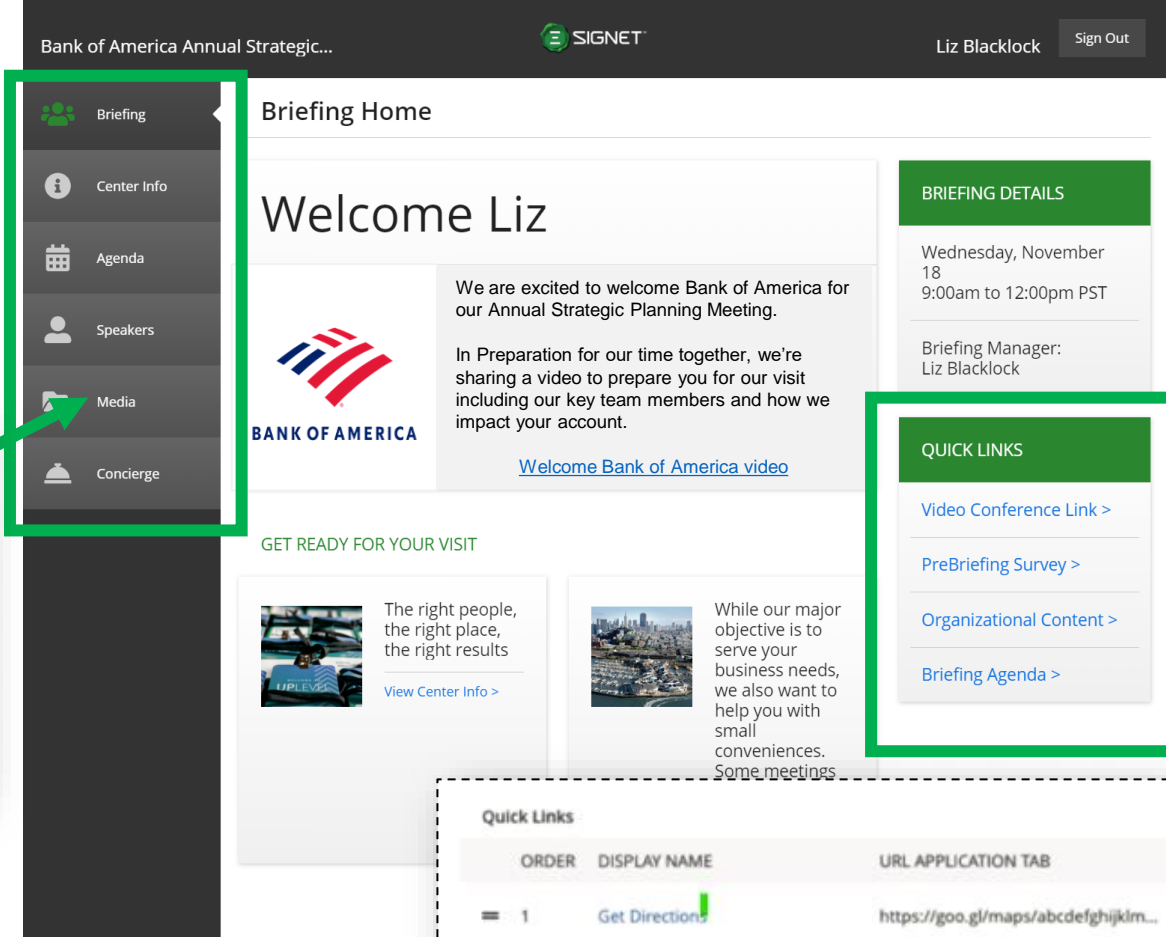
 imagename.jpg [×](#)

 videoname.mp4 [×](#)

 pdfname.pdf [×](#)

[Upload](#)

Supported media types include JPG, PNG, MP4, and PDF.



Bank of America Annual Strategic...

Briefing Home

Welcome Liz

We are excited to welcome Bank of America for our Annual Strategic Planning Meeting.

In Preparation for our time together, we're sharing a video to prepare you for our visit including our key team members and how we impact your account.

[Welcome Bank of America video](#)

GET READY FOR YOUR VISIT

The right people, the right place, the right results

[View Center Info >](#)

While our major objective is to serve your business needs, we also want to help you with small conveniences. Some meetings

BRIEFING DETAILS

Wednesday, November 18
9:00am to 12:00pm PST

Briefing Manager:
Liz Blacklock

QUICK LINKS

[Video Conference Link >](#)

[PreBriefing Survey >](#)

[Organizational Content >](#)

[Briefing Agenda >](#)

Reorder Quick Links

Quick Links			
ORDER	DISPLAY NAME	URL	APPLICATION TAB
1	Get Directions	https://goo.gl/maps/abcdefghijklm...	
2	Browse related media to your briefing	Media	
3	Room in Center Map	Center Map	

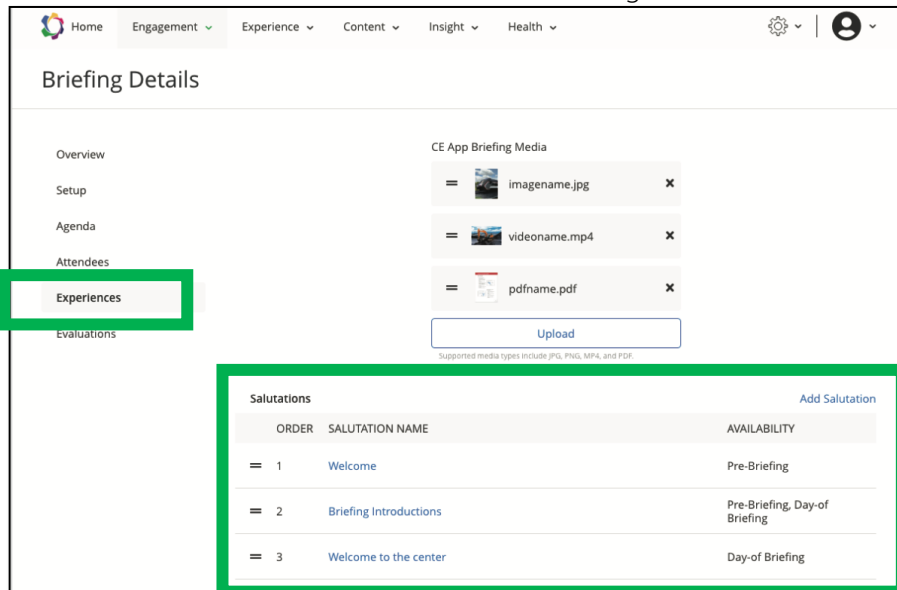
CE App – New Features // Briefing Personalization

NOV 2020 RELEASE

Use Case: I want to personalize a salutation for a specific briefing.

Simple steps:

- CS Platform Home Page → [View Active Briefings](#)
- Select a briefing to personalize
- Click **Experiences**
- Click **Add Salutation** to add a new message



Briefing Details

Overview
Setup
Agenda
Attendees
Experiences
Evaluations

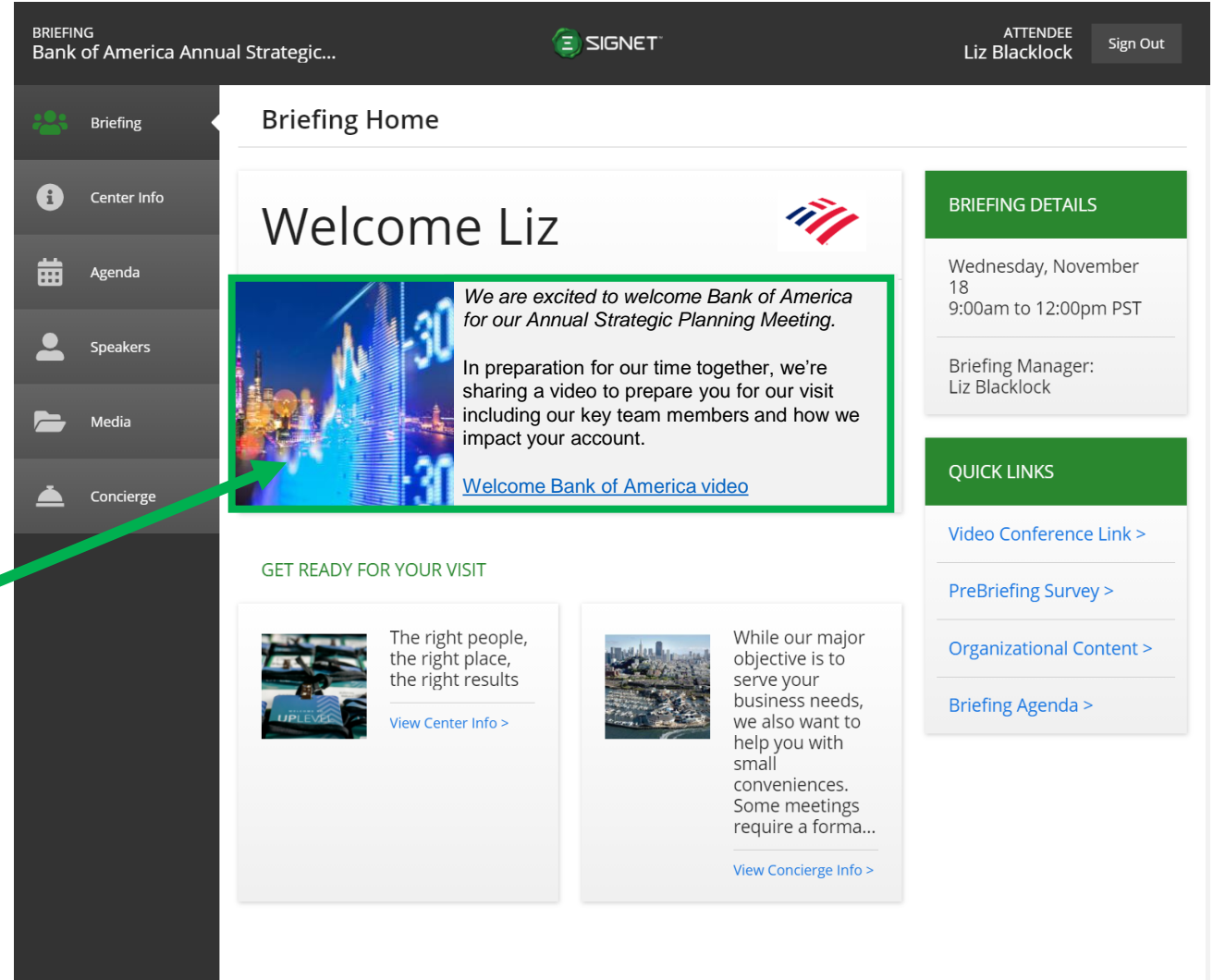
CE App Briefing Media

- image.jpg
- videoname.mp4
- pdfname.pdf

[Upload](#)

Supported media types include JPG, PNG, MP4, and PDF.

Salutations			Add Salutation
ORDER	SALUTATION NAME	AVAILABILITY	
1	Welcome	Pre-Briefing	
2	Briefing Introductions	Pre-Briefing, Day-of Briefing	
3	Welcome to the center	Day-of Briefing	



BRIEFING
Bank of America Annual Strategic...

SIGNET

ATTENDEE
Liz Blacklock [Sign Out](#)

Briefing Home

Welcome Liz

We are excited to welcome Bank of America for our Annual Strategic Planning Meeting.

In preparation for our time together, we're sharing a video to prepare you for our visit including our key team members and how we impact your account.

[Welcome Bank of America video](#)

GET READY FOR YOUR VISIT

The right people, the right place, the right results
[View Center Info >](#)

While our major objective is to serve your business needs, we also want to help you with small conveniences. Some meetings require a forma...
[View Concierge Info >](#)

BRIEFING DETAILS

Wednesday, November 18
9:00am to 12:00pm PST

Briefing Manager:
Liz Blacklock

QUICK LINKS

- [Video Conference Link >](#)
- [PreBriefing Survey >](#)
- [Organizational Content >](#)
- [Briefing Agenda >](#)

Virtual Welcome New Features

NOV 2020 RELEASE

- CS Platform Home Page →

[View Active Briefings](#)

- Select Briefing

Countdown Timer
Screen controls // Pause/Fwd.



Bank of America
Annual Strategic...
Bank of America


Wed, Nov 18, 2020
9:00 - 12:00
Silicon Valley Signet Experience
Center
Virtual
Briefing Manager: Liz Blacklock


Briefing Status: Active
ID: 678 • PIN: I6MIkgLf

[Your CE App Access Link](#) 

[Launch Virtual Welcome](#) 

[Share CE App Access Link](#) 



 SIGNET™

Resumes in: 09:47

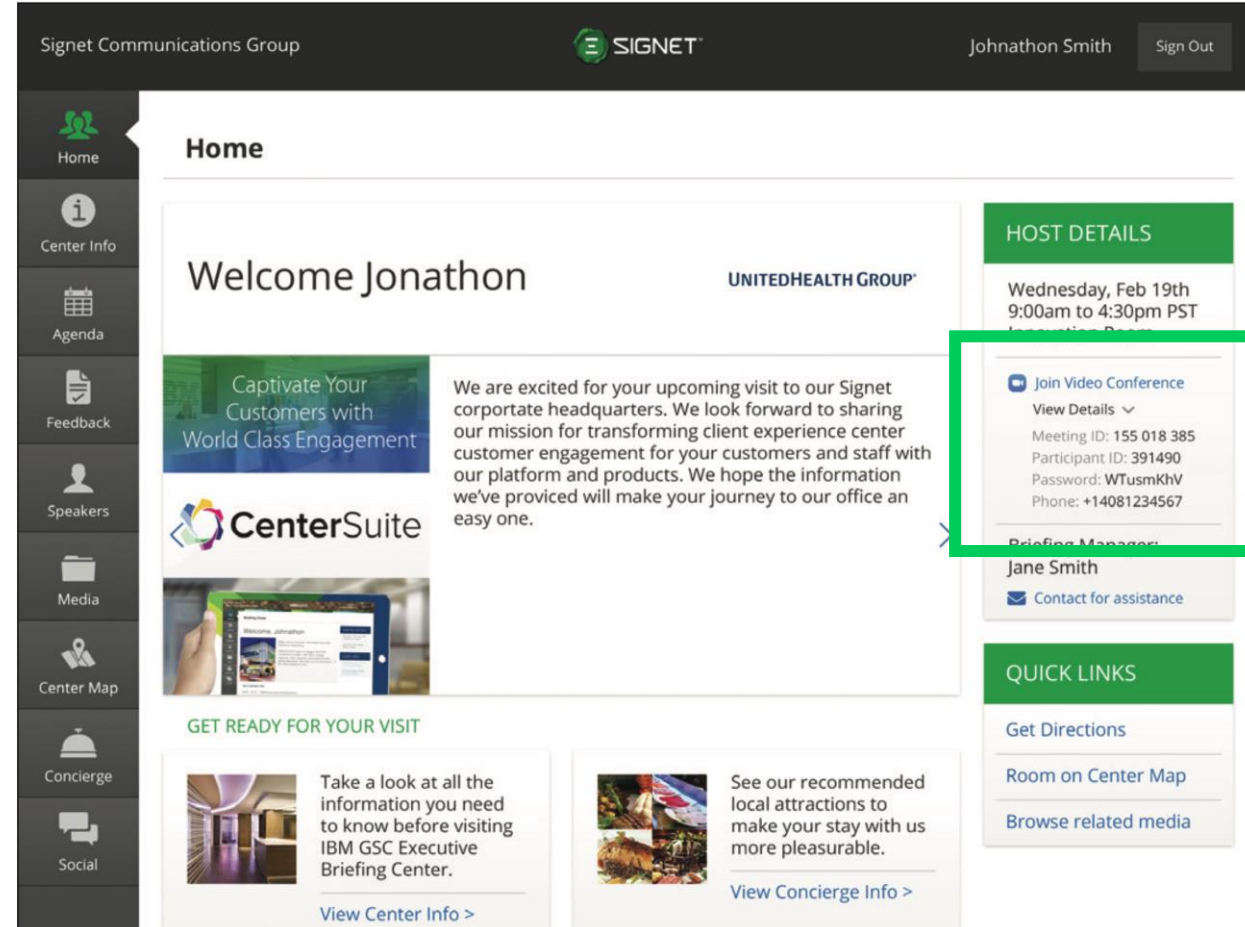
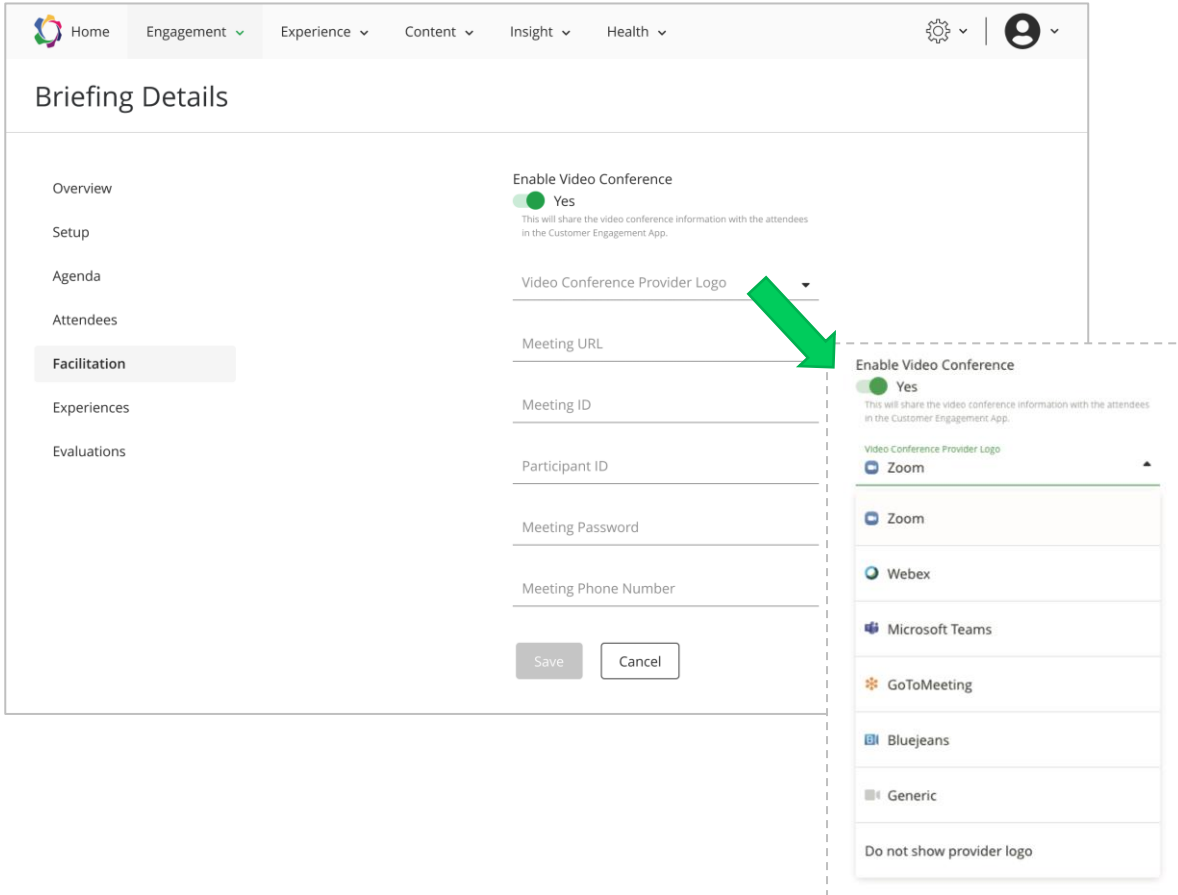
5 min
10 min
15 min

Welcome
Bank of America
Annual Strategic
Review

CE App // Roadmap – Video Conf Link and Info

Coming in December release.

What provider do you use and what info do you share in invite?



CE App // Roadmap – Contact Host for Assistance



Coming in December release.

Would you want attendees contacting the briefing manager or discussion leaders via portal email?

Customer Engagement App

Center Info

Media

Leadership

Concierge

Style

Messaging

Email

Settings

Center
Default Settings

Select Header Briefing Name

☒ Company Name

☐ Briefing Meeting Name

Show Home visiting Company Logo

☒ Yes

Home Pre-Briefing Separator Label
Get Ready For Your Visit

Home Post-Briefing Separator Label
Thank You

Home Briefing Details Container Title
Host Details

Home Quick Links Container Title
Quick Links

Home Details Container Info to Display

☒ Meeting Room

☒ Briefing Manager

☐ Other

External API Field

Display Label

Allow Contact Briefing Manager Email Feature

☒ Yes

Allow Contact Speaker Email Feature

☒ Yes

Quick Links

ORDER	DISPLAY NAME	URL APPLICATION TAB	AVAILABILITY
1	Visit Our Website	https://iclanet.tv	Pre-Briefing, Day-of

New Quick Link

Signet Communications Group

SIGNET

Johnathon Smith Sign Out

Home

Center Info

Agenda

Feedback

Speakers

Media

Center Map

Concierge

Social

Welcome

Captivate Customer World Class Experience

Center

GET READY FOR YOUR VISIT

Take a look at all the information you need to know before visiting IBM GSC Executive Briefing Center.

View Center Info >

See our recommended local attractions to make your stay with us more pleasurable.

View Concierge Info >

HOST DETAILS

Wednesday, Feb 19th
9:00am to 4:30pm PST
Innovation Room

Join Video Conference

View Details

Meeting ID: 155 018 385
Participant ID: 391490
Password: WTusmKhV
Phone: +14081234567

Briefing Manager:
Jane Smith

Contact for assistance

QUICK LINKS

Get Directions

Room on Center Map

Browse related media

Contact Briefing Manager

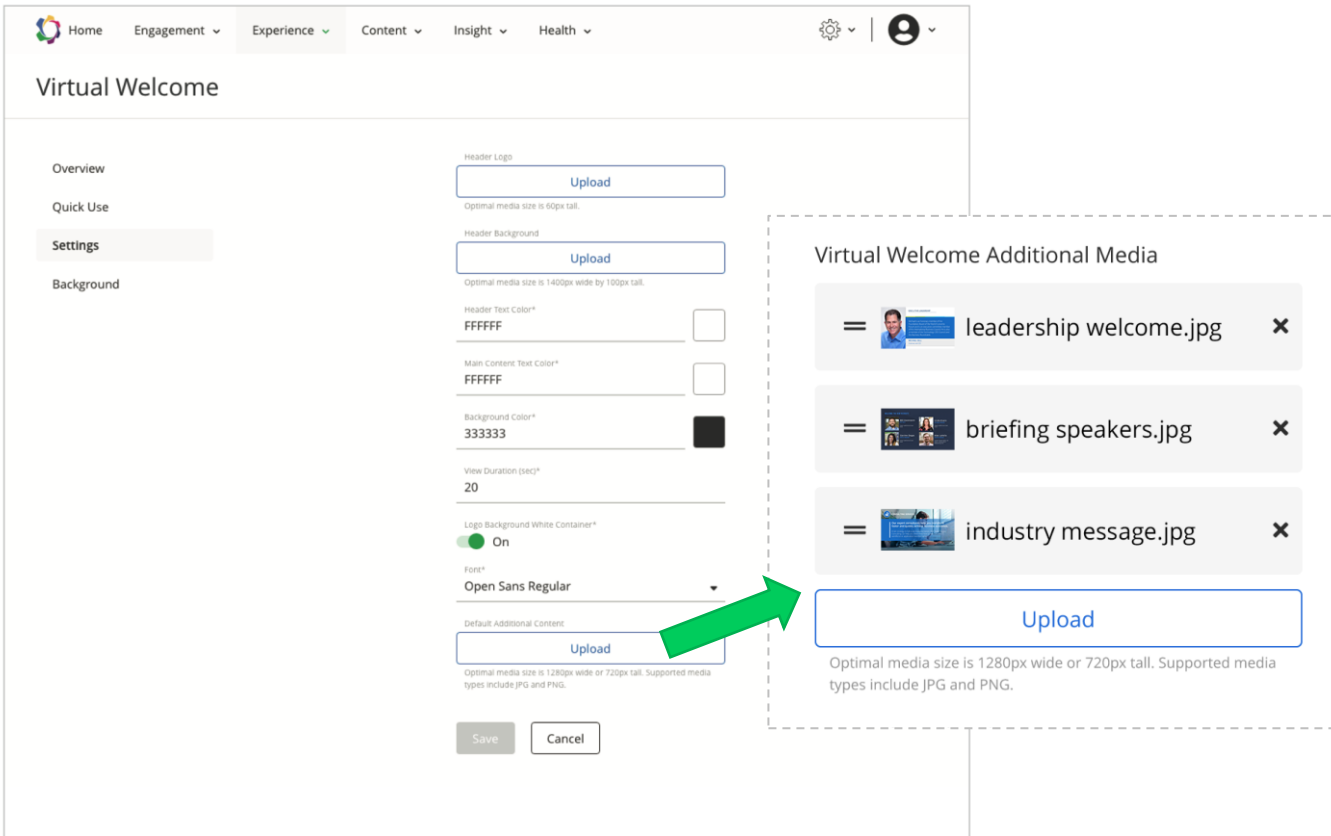
Enter the message for the Briefing Manager and the system will initiate an email correspondence.

Cancel Send

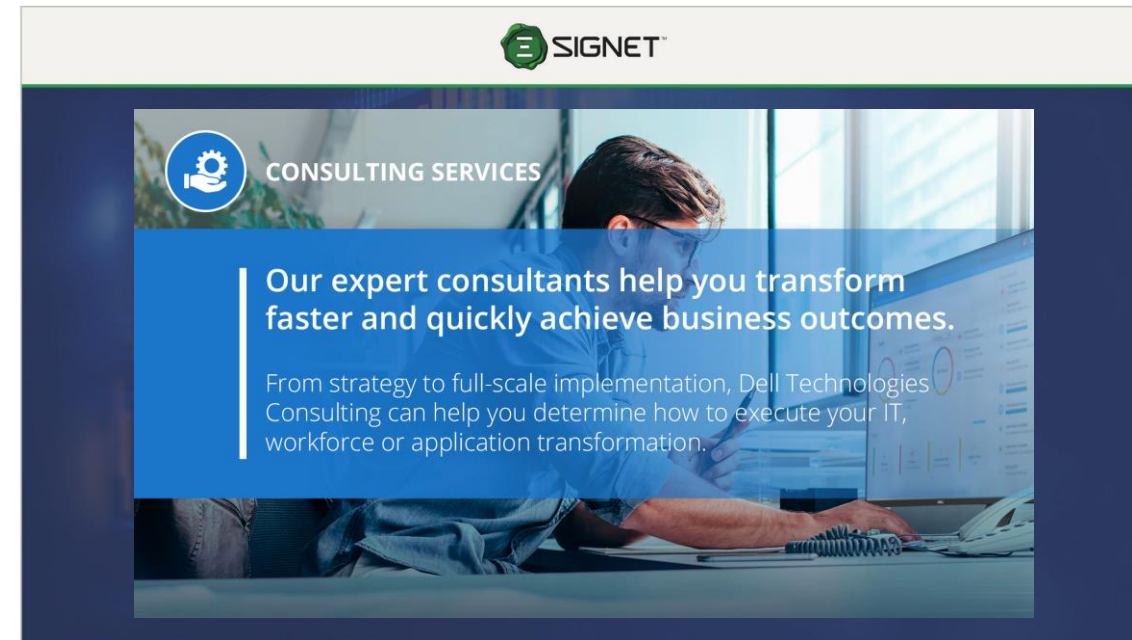
CE App // Roadmap – Virtual Welcome Add'l Content

Coming in December release.

What type of content would you ideally include?



The screenshot shows the 'Virtual Welcome' configuration page in the CE App. The left sidebar contains navigation links: Overview, Quick Use, Settings (highlighted), and Background. The main content area is divided into two sections. The top section, 'Header Logo', has an 'Upload' button and a note: 'Optimal media size is 60px tall.' The middle section, 'Header Background', also has an 'Upload' button and a note: 'Optimal media size is 1400px wide by 100px tall.' Below this are color pickers for 'Header Text Color*' (set to FFFFFFFF), 'Main Content Text Color*' (set to FFFFFFFF), and 'Background Color*' (set to 333333). There is a 'View Duration (sec)*' field set to 20, a 'Login Background White Container*' toggle set to 'On', and a 'Font*' dropdown set to 'Open Sans Regular'. The bottom section, 'Default Additional Content', has an 'Upload' button and a note: 'Optimal media size is 1280px wide or 720px tall. Supported media types include JPG and PNG.' A green arrow points from this 'Upload' button to a dashed box on the right. This dashed box, titled 'Virtual Welcome Additional Media', contains three items: 'leadership welcome.jpg', 'briefing speakers.jpg', and 'industry message.jpg', each with a small thumbnail, an equals sign icon, and a close 'X' button. At the bottom of this dashed box is another 'Upload' button and a note: 'Optimal media size is 1280px wide or 720px tall. Supported media types include JPG and PNG.'



CE App // Roadmap – Customer Insight for Future Features



What do you label your agenda topic speakers as?

I.e. Speakers, Discussion Leaders, Presenters, Other?

What do you label your briefings as?

I.e. Briefings, Engagements, Meetings, Other?

Do you ask pre-briefing survey questions? And if so, what do you ask about?

I.e. Personal preferences, dietary restrictions, solution understanding, clothing size (for gifts), NPS, other?

What gifts are you giving attendees, pre-COVID versus now, if different?

I.e. Branded swag, clothing apparel, stationary packet, embroidered bags, charitable donations, other?

Thank You



UPEVEL

VIRTUAL CUSTOMER BRIEFING SERIES

Join Signet to talk through how the best in the experiential marketing space are driving awareness, recognition and funding of their programs today, and in the future.



Thursday
December 10th, 2020



11 AM PST
2 PM EST



Virtual
Webinar



MARSHALL THOMPSON
Director & Host

KEELEY LUNDQUIST
Center Experience Lead



RYAN FARSAI
Director, Marketing
proofpoint.

STACEY MILLIGAN
Director, Executive Briefing Program
COHESITY

