



Customer Portal Release Highlights

July 2021

Customer Portal Feature Summary



**Active on
7/12/21**

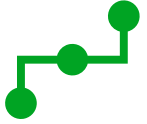
Features

- Salesforce Integration
- Requests
- Opportunities
- Sentiment Analysis
- Enhanced Reporting

UI Updates

- Virtual Welcome // Center level Setting & Style
- 3-month calendar email
- Responsive UI layout
- Meeting Invitation & Share CE App Access Status

Salesforce Integration



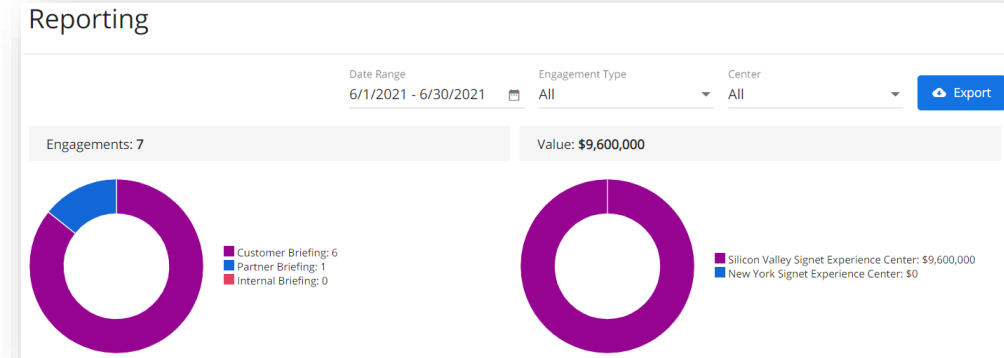
Operational simplicity
Improved analytics: opportunities & conversion rates

Use Case:

Integrate key data point; minimize operational time, track program ROI



Customer Portal



Salesforce: Opportunities
requests briefing via
Salesforce: Opportunities

Engagements → Requests

Requestor detail, Account,
opportunity detail, briefing
logistics requests, objectives

EBC Staff: Request reviewed
and converted to a briefing &
planned as usual

Insights → Reporting

Analyze Opportunity values

Engagements → Requests

Analyze conversion data on
requests

Requests



Use Case:

Manage and track from request to completion





Track briefing requests separately


Engagements → Requests


Briefing Detail
Opportunity Detail
Account Details

Briefing Info

Center Location * 

Briefing Request Date * 

Alternate Briefing Request Date * 

Briefing Format * 

Estimated # of Attendees *

Briefing Objective and Notes *

Requester Name *

Requester Email *


Opportunity Details

Opportunity Name

Opportunity ID


Opportunity Amount

Opportunity Probability (%)

Estimated Opportunity Close Date 

Opportunity Description

Account Details

Account Name * 

Approved and ready to plan?

Edit

Convert to Briefing

Do Not Convert

Delete

Opportunity Tracking



\$ Track opportunity details for analysis

Engagements → Briefing Details
→ Opportunity

Add opportunity details at any stage of the briefing
-and-
Update and track opportunity changes for analysis

Use Case:
Track and manage opportunity value for deals

Briefing Details

- Overview
- Setup
- Opportunity**
- Agenda
- Attendees
- Facilitation
- Experiences
- Evaluations

Opportunity Name *

Opportunity ID

Opportunity Amount *

Opportunity Probability (%) *

Estimated Opportunity Close Date *

Opportunity Description

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

Briefing Details

- Overview
- Setup
- Opportunity**
- Agenda
- Attendees
- Facilitation
- Experiences
- Evaluations

The Opportunity is still open.

The close date does not changed.

The opportunity probability does not changed.

It increased \$250,000 with a new amount of \$1,500,000.

Original Opportunity Data

Estimated Opportunity Close Date
12/30/2021

Opportunity Probability
75%

Opportunity Amount
\$1,250,000.00

[Update Opportunity Info](#)

Briefing: Evaluations



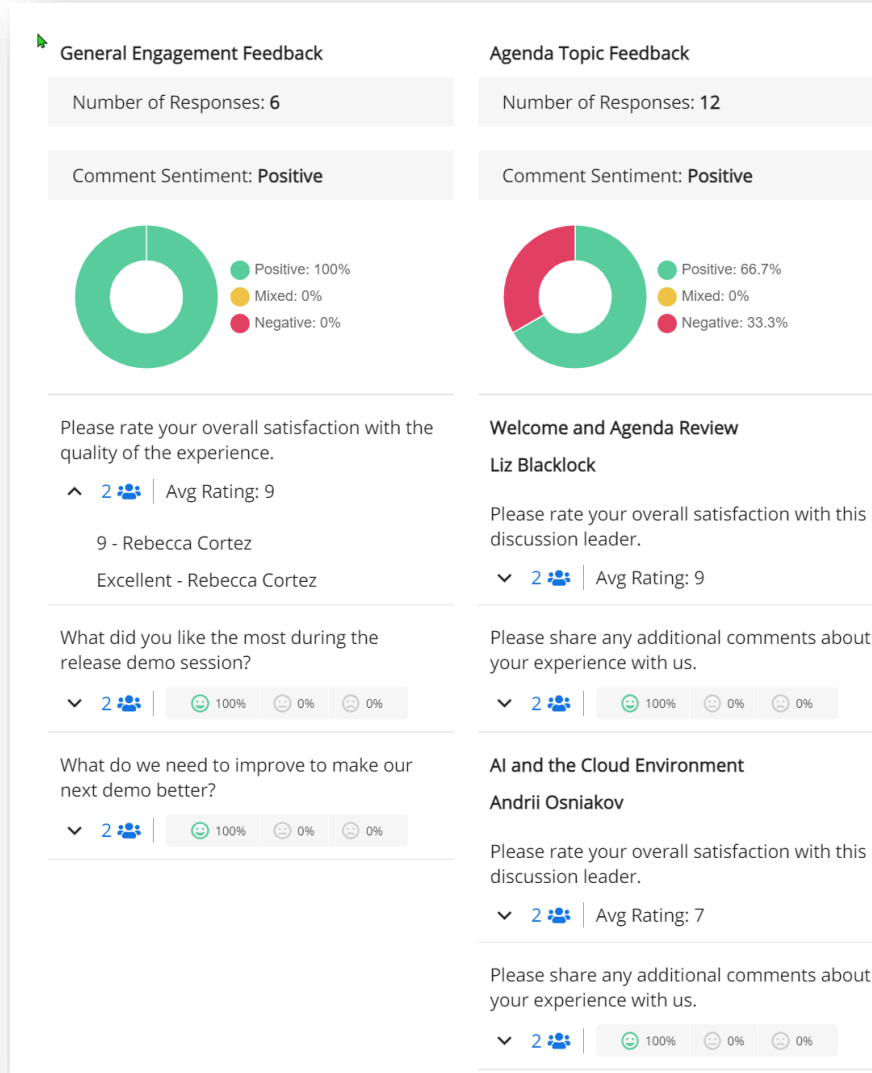
Visual sentiment analysis on feedback

Briefings → Briefing
Overview → Evaluations

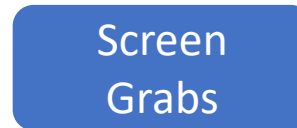
Feedback is analyzed by a 3rd party tool that assigned a score (sentiment analysis)

Internal or External

Use Cases: Enhanced Feedback: Sentiment Analysis

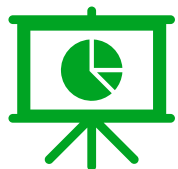


Share data via



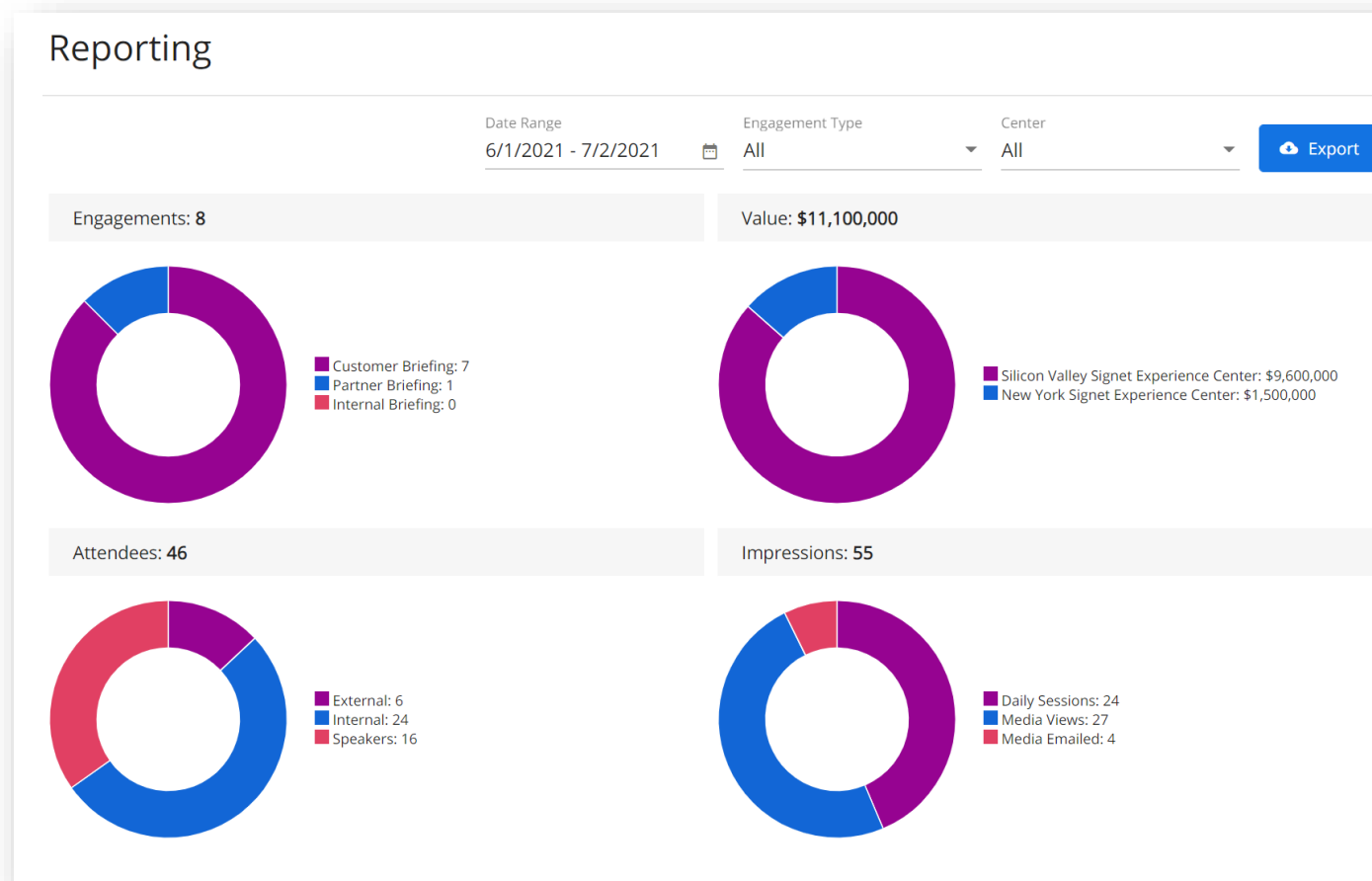
Insight: Reporting

Use Cases:
Sentiment Analysis

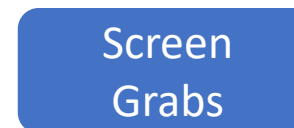


Enhanced Report

- Engagement Types
- Attendees
- Opportunity
- Engagement / Impressions



Share data via

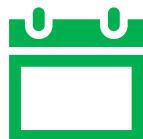


Customer Portal



Use Case:

Keep up with the calendar!



Upcoming 3 Month Email

Keep up with the quarter

Global Feature access:
Profile → Preferences

Preferences

Please select which system email to receive.

Receive Weekly Debrief Email



No

Receive Upcoming 3 Months Email



No

Save

Cancel

Use Cases:

Style and Settings at the CENTER level



Weekly Debrief Email

Style can be modified at the center level!

Global Feature access:
Experiences → Virtual Welcome → Style & Settings

Virtual Welcome

Overview

Quick Use

Background

Styles

Settings

Center

NTT DATA Executive Briefing Center

Header Logo

Upload

Optimal media size is 60px tall.

Header Background

Upload

Optimal media size is 1400px wide by 100px tall.

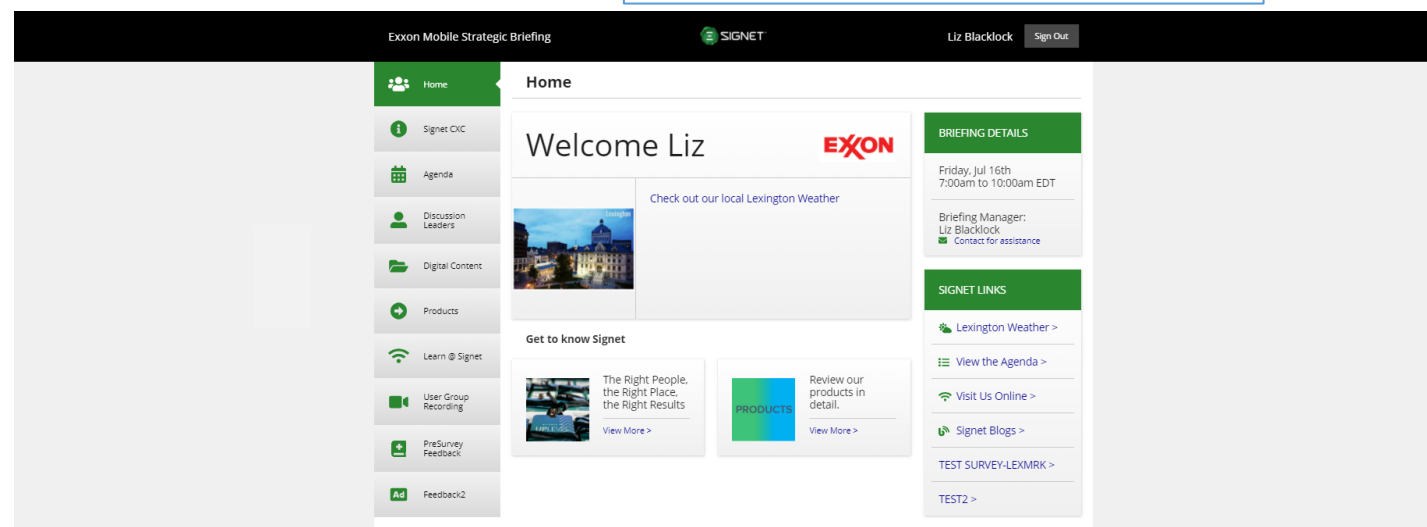
Increase Viewable Space

Use Cases:
Better viewing

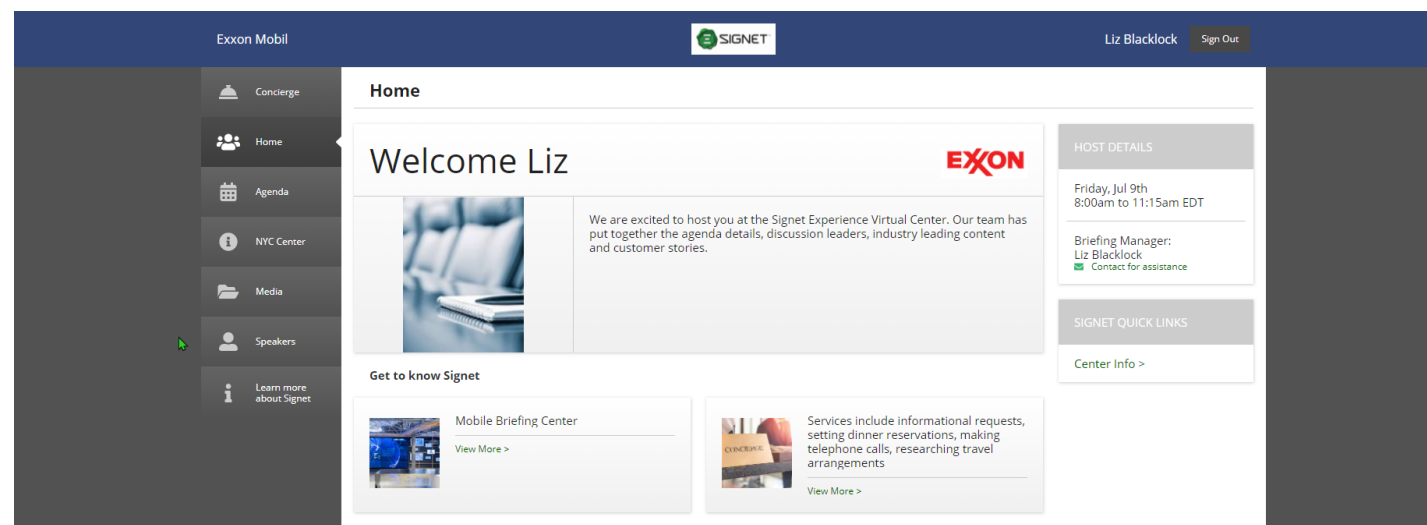


Generous Viewing area

Current



Updated




Meeting Invite Status



Use Cases:
Monitor Meeting Invitation Status








**Canadian National
Railway Briefing**
Canadian National R...


Customer Briefing | Virtual
New York Signet Experience Center
Briefing Manager: Liz Blacklock
Wed, Jul 7, 2021 | 09:00am - 11:00am EDT
Virtual

Briefing Status: Active
ID: 290 | PIN: qnDXm0Od

 Internal Attendees: 4

 Agenda Topics: 6

 Speakers: 4








 External Attendees: 3

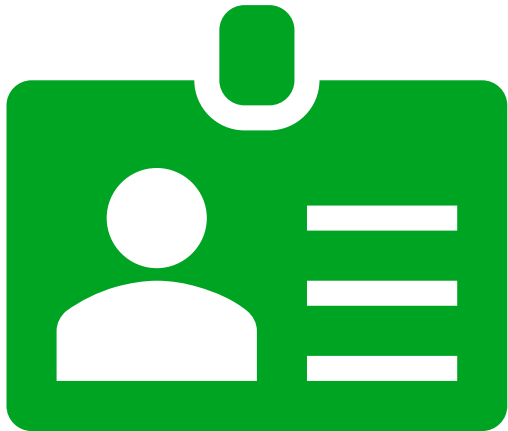
[Launch Virtual Welcome](#)

[Your CE App Access Link](#)

[Send Meeting Invite](#)

[Share CE App Access](#)

| TYPE | NAME | TITLE | CE APP ACCESS LINK | INVITE STATUS |
|----------|----------------|-------|---|---------------|
| INTERNAL | Liz Blacklock | |  | Accepted |
| INTERNAL | Rebecca Cortez | CSM |  | Sent |
| INTERNAL | Paulomi Bose | |  | Sent |
| EXTERNAL | Nick Hexum | |  | Not Sent |
| EXTERNAL | Tony Stark | |  | Not Sent |
| INTERNAL | Rebecca Cortez | |  | Not Sent |
| EXTERNAL | Carol Danvers | |  | Not Sent |



For Video and text FAQ check us out @
<https://info.signet.tv/knowledge>

Our support team is available @ support@signet.tv

For additional training reach out to your Customer
Success Manager or Success@Signet.tv