

Nexus Platform Lunch-n-Learn May 18, 2022

TODAY'S SESSION IS FOCUSED ON



Optimizing

How do I?

- ✓ Update briefing request form
- ✓ Update agenda templates
- ✓ Utilize Portal Tabs
- ✓ Print an agenda sheet and tent cards

Briefing Request Form



**ACCESS : HOME → Programs
→ Briefing Request Form**

Nexus has a customizable Briefing Request Form

- Add Opportunity details
- Define add'l questions with text, single select and multiple select answers

The image shows a screenshot of the Briefing Request Form interface, divided into three main panels. The first panel, 'Briefing Info', contains fields for Center Location, Briefing Request Date, Alternate Briefing Request Date, Briefing Format, Estimated # of Attendees, Clients Fiscal Year, Executive attendance needed, Executive Requested (name), NDA In Place, Topic Categories Requested, DEMO Requests, Briefing Objective and Notes, Requester Name, and Requester Email. The second panel, 'Opportunity Details', includes a toggle for 'Is this an Opportunity?', fields for Opportunity Name, Opportunity ID, Opportunity Amount, Opportunity Probability, Estimated Opportunity Close Date, Opportunity Description, and a link to 'Add Additional Opportunity'. The third panel, 'Account Details', features fields for Account Name, Account CRM ID, Annual Revenue, Account Industry, and Account Description, followed by an 'Attendees' section with an 'Add Attendee' link.

Q2 will offer full configuration of the engagement request form.

- Include or hide each section
- Change field order within each section
- Set request form per center and engagement type
- Create custom fields and values
- Duplicate settings for another usage

... & in the future, look for more dynamic features such as agenda topic selection from center's pool, contacts from CRM, etc.

Agenda Templates



ACCESS : HOME → Program → Agenda Templates
Settings done at the center level

➤ Change individual briefing agenda templates at the center level

Customer Briefing In-Person Single Day
Customer Briefing In-Person Multi-Day
Partner Briefing Virtual Multi-Day
Test Briefing Virtual Single Day
Customer Briefing Virtual Single Day
Test Briefing In-Person Multi-Day
Test Briefing In-Person Single Day
Test Briefing Virtual Multi-Day
Customer Briefing Virtual Multi-Day
Partner Briefing In-Person Multi-Day
Partner Briefing Virtual Single Day
Partner Briefing In-Person Single Day

Agenda Template Details

Center

NYC Nexus Experience Centers

15 minutes

Greetings & Introductions

x

30 minutes

Voice of the Customer

x

15 minutes

Blank Topic

x

60 minutes

Lunch Break

x

15 minutes

Blank Topic

x

15 minutes

Blank Topic

x

15 minutes

Afternoon Break

x

15 minutes

Blank Topic

x

30 minutes

Briefing Wrap-up

x

15 minutes

Blank Topic

x

Save

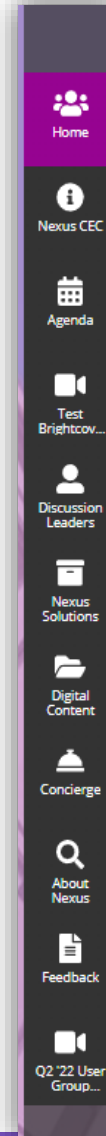
Cancel

Portal Tabs



ACCESS : EXPERIENCES → Customer Portal → Configurations

- Utilizing tabs during the briefing phases
- Ability to rename tabs
- Presenting in correct order
- Ability to add custom icons



Application Tabs			
ORDER	TAB NAME	PAGE TITLE	AVAILABILITY
1	Home	Home	Pre-Briefing, Day-of-Briefing, Post-Briefing
2	Nexus CEC	Nexus CEC	Pre-Briefing, Day-of-Briefing, Post-Briefing
3	Agenda	Agenda	Pre-Briefing, Day-of-Briefing, Post-Briefing
4	Test Brightcove iFrame Removed	Test of Brightcove URL without iFra...	Pre-Briefing, Day-of-Briefing, Post-Briefing
5	Discussion Leaders	Discussion Leaders	Pre-Briefing, Day-of-Briefing, Post-Briefing
6	Nexus Solutions	Next-level client engagement is here	Pre-Briefing, Day-of-Briefing, Post-Briefing
7	Digital Content	Digital Content	Pre-Briefing, Day-of-Briefing, Post-Briefing
8	Concierge	Concierge	Pre-Briefing, Day-of-Briefing, Post-Briefing
9	About Nexus	Why Nexus	Pre-Briefing, Day-of-Briefing, Post-Briefing
10	Feedback	Feedback	Day-of-Briefing, Post-Briefing
11	Video	Q1 CUGM Video	Disabled
12	Q2 '22 User Group Recording	5/22 User Group Recording	Pre-Briefing, Day-of-Briefing, Post-Briefing

Print Agenda Sheets



ACCESS : HOME → Program → Printables
Settings done at the center level

Tent Cards

- Client Logo
- Show QR Code
- Show Attendee Title

Agenda

- Client Logo
- Show QR Code
- Salutation Message
- Show Agenda Topic Name in all caps
- Show Agenda Descriptions
- Show Speakers
- Show Speaker Title

The screenshot shows a 'Settings' modal with a 'Printables' section. Under 'Attendee Tent Cards', there is a 'Preview' button and a dropdown menu for 'Center' set to 'NYC Nexus Experience Centers'. Below this, there is a 'Welcome Text Color *' field with the value '#333333' and a color picker. Three toggle switches are shown, all set to 'Yes': 'Show Host Logo', 'Show Customer Portal General Access QR Code', and 'Show Attendee Job Title'. At the bottom are 'Save' and 'Cancel' buttons.

The screenshot shows a 'Settings' page with a 'Printables' section. Under 'Agenda Sheets', there is a 'Preview' button and a dropdown menu for 'Center' set to 'NYC Nexus Experience Centers'. Below this, there are two color pickers: 'Briefing Name Text Color *' and 'Agenda Topic Text Color *', both set to '#333333'. There are seven toggle switches, all set to 'Yes': 'Show Host Logo', 'Show Customer Portal General Access QR Code', 'Show Client Logo with Welcome', 'Show Salutation Message', 'Show Agenda Topic Name in All-Caps', 'Show Agenda Descriptions', and 'Show Speakers'. At the bottom are 'Save', 'Cancel', and 'Restore Defaults' buttons.

Let's dive in!