

 nexus



Agenda: Section I



Prerequisite

- Nexus Hub Overview (12 min video Intro)

Overall Feature Review

- Nexus Hub Platform – Navigation/Filters

Nexus Hub Platform – General Navigation



<https://hub.nexuscenter.io/platform/> → Web-based tool

Hub

Engagement ▾ Experience ▾ Content ▾ Insight ▾ Health ▾

Welcome, Stacy

Today's Briefings

No briefings scheduled for today.

Upcoming Briefings

Q2

Q2

Mon, Dec 13

≡ 2 📌 0 👤 0

View All Briefings

Q2 Integration

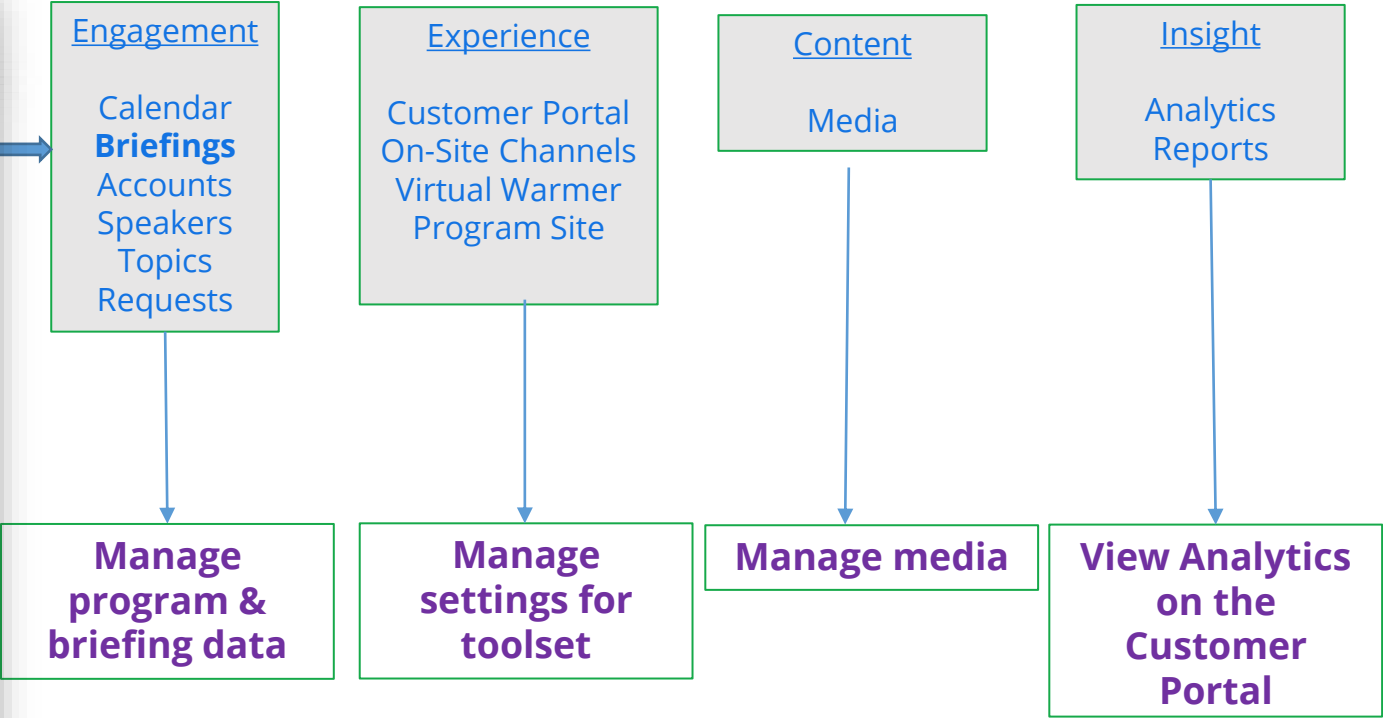
Exxon Engagement

Exxon

Tue, Dec 14

≡ 5 📌 0 👤 0

Quick Tip: Click on briefing name to open



Health Tab - coming soon!

Welcome Home!



Welcome, Liz

Center
New York Signet Ex... [+ Add Briefing](#)

Engagements [\(View Calendar\)](#)

This Week (4) **Next Week (3)**

2 [Calendar Meeting](#)
2 Accounts

[MLB Executive Briefing](#)
Major League Baseball

[State of California Strategy Session](#)
State of California

[NASA](#)
Space X

Quick Tip: click on the briefing name to open

Reporting [\(View All\)](#)

Last Week **Last Month**

Engagements: 2	Value: \$500,000	Attendees: 3	Impressions: N/A
Customer Briefing: 1 Partner Briefing: 1 Internal Briefing: 0 Customer test: 0	New York Signet Experience Center: \$500,000	External: 1 Internal: 2 Speakers: 0	No Data

This flag controls what "center"

The default behavior is set in the user section!

Toggle to see reporting for last WEEK or last MONTH

Agenda: Section II



Planning the Experience

- Briefing Building Blocks
- Let's build a briefing!
- Sharing digital content
- Sharing the experiences

Day of Experience

- Virtual Welcome
- Feedback
- Printables

Post Experience

- Feedback
- Planning/Wrap Up Report

Planning the Experience

Briefing: Building Block



The Nexus Platform houses the 3 key building blocks under **Engagement**

- Account/Industry
- Agenda Topics
- Speakers

The screenshots show the 'Engagement' dropdown menu in the Nexus Hub interface. The first screenshot highlights 'Accounts', the second highlights 'Topics', and the third highlights 'Speakers'. The 'Speakers' screenshot also displays a table of speakers.

	TITLE	LAST MODIFIED
Stacy Wood	CSM	10/23/2021
Susie Giacomelli	Sr. Briefing Program Manager	08/16/2021
Heather St Louis	Finance Specialist I	08/09/2021

*We will work with you to setup the Topics & Speakers before go live so this is focused on ongoing maintenance only

Briefing: Creating the framework



Creating the overall framework of the briefing

The image shows a user interface for creating a briefing. On the left is a main dashboard with a navigation bar (Hub, Engagement, Experience, Content, Insight, Health), a welcome message 'Welcome, Stacy', and sections for 'Today's Briefings' (empty) and 'Upcoming Briefings' (listing items like 'October Update', 'Gitr Hub Briefing', 'Logitech Executive Briefing', etc.). A blue 'Add Briefing' button is in the top right. A modal form titled 'Briefing Info' is open on the right, with a blue arrow pointing to it from the dashboard button. The modal has two sections: 'Briefing Info' and 'Scheduling Details'. The 'Briefing Info' section includes fields for 'Center Location *' (New York Signet Experience Center), 'Engagement Type *' (Customer Briefing), 'Account Name*' (SIGN Signet), 'Briefing Format *' (Virtual), 'Briefing Name *' (Signet), and 'Briefing Manager *' (Stacy Wood). The 'Scheduling Details' section includes 'Briefing Date *' (9/30/2021), 'Start Time *' (8:00am), 'End Time *' (11:00am), and 'Select Meeting Room *' (No Room Needed). At the bottom of the modal are 'Submit' and 'Cancel' buttons.

Briefing Info

Center Location *
New York Signet Experience Center

Engagement Type *
Customer Briefing

Account Name*
SIGN Signet

[Add Additional Account](#)

Briefing Format *
Virtual

Briefing Name *
Signet

Briefing Manager *
Stacy Wood

Scheduling Details

Briefing Date *
9/30/2021

Start Time *
8:00am

End Time *
11:00am

Select Meeting Room *
No Room Needed

[Add Additional Day](#)

Submit Cancel

Required Fields


- Center Location
- Engagement Type
- Account
- Briefing Format
- Briefing Name
 - NAME ON VIRTUAL SCREEN
- Briefing Manager
- Briefing Date
- Start Time
- End Time
- Select Meeting Room

Briefing: Overview



Left Nav Category Uses

Overview	Briefing Overview
Agenda	Manage Agenda
Attendees	Manage Attendees
Facilitation	Manage 2 nd Time Zones, conf mtg detail
Impressions	See what media were viewed/emailed/downloaded
Evaluations	View/download received feedback
Wrap-Up	Voice of the customer and wrap-up notes
Setup	Review Briefing Setup
Opportunity	View or manage Briefing Opp
Experiences	Control briefing exp (Customer Media, Virtual Warmer Media, Salutations, Quick Links, Tabs)
Recordings	Upload either audio or video file with briefing recording

 **Gitr Hub Briefing** Actions ▾

Overview

Agenda

Attendees

Facilitation

Impressions

Evaluations

Wrap-up

More

Setup

Opportunity

Experiences

Recordings

👤 Internal Attendees: 1

☰ Agenda Topics: 11

🎤 Speakers: 1

👥 External Attendees: 0

Pre-Briefing Customer Impressions

Daily Sessions	Media Views	Media Emailed
0	0	0

Briefing Details

Account: [Github](#)

Customer Briefing | In-Person

NYC Signet Experience Center

Briefing Manager: [Liz Blacklock](#)

Thu, Oct 28, 2021 | 7:00am - 2:30pm EDT

Green Room

PIN: IcYupvN4

Engagement Reports

Planning Report

[Preview](#) | [Download](#)

Wrap-up Report

The briefing has not started yet.

[Launch](#) ▾

[Print](#) ▾

[Email](#) ▾

[Copy](#) ▾

Briefing: Agenda



Thu, Sep 30, 10:00am - 2:00pm

10:00am - 10:15am (15 minutes)
Welcome and Agenda Review
 Neil Rieger

10:15am - 10:45am (30 minutes)
Voice of the Customer

10:45am - 11:15am (30 minutes)
Cloud Strategy
 Liz Blacklock

11:15am - 12:00pm (45 minutes)
Current Platform Overview
 Reddy Cortez

12:00pm - 12:30pm (30 minutes)
Afternoon Break

12:30pm - 1:00pm (30 minutes)
Fabric & You - Sewing 101
 Liz Blacklock

1:00pm - 1:30pm (30 minutes)
Security Fabric for Enterprise
 Alex Gold

[Add Agenda Item](#)



Agenda Details

Start time *
1:45pm

Is this topic in a different meeting room?
☐ No

Topic *
Welcome and Agenda Review

Topic Name Override
Welcome and Agenda Review

Topic Description Override
B I U
Welcome and Agenda Review

Duration *
15 min

Speaker
 Alex Gold
Director

Show Speaker
☒ Yes
This will display the speaker in the CE App and Virtual Welcome.

Include Speaker in Evaluation
☒ Yes
This will display the speaker in the feedback section.

[Add Additional Speaker](#)

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

Required Fields

- Start Time
- Topic (drop down or add)
- Duration (drop down)
- Speaker(s) (drop down or add)
 - **Show speaker**
 - **Evals flag**

Override Topic name or external description

Q: How do I add or edit an agenda item?

A: Click on the agenda name to edit, always click **SAVE!**

*Is there an Ad-hoc topic?
- YES -
Select : **CUSTOM TOPIC & update Topic Name***

Briefing: Attendees



ACCESS: HOME → EXPERIEINCE → BRIEFING → ATTENDEE

MLB Executive Briefing

Actions

All

Add Attendee

Add Multiple

Overview

Agenda

Attendees

Facilitation

Impressions

Evaluations

Wrap-up

More

TYPE	NAME	TITLE	CUSTOMER PORTAL ACCESS LINK	INVITE STATUS
INTERNAL	Liz Blacklock			Not Sent
EXTERNAL	Carol Danvers			Not Sent
EXTERNAL	Tony Stark			Not Sent
EXTERNAL	Pepper Potts			Not Sent
EXTERNAL	Adam Carter	Manager		Not Sent
EXTERNAL	John Smith			Not Sent

Required Fields

- Type (Internal, External)
- First
- Last
- Title
- Email (req if internal)

Type *

Attendee First Name *

Attendee Last Name *

Attendee Details

Attendee Type *	First Name *	Last Name *	Company *	Email	Job Title	Level	Role
External	Adam	Carter	IBM	adamc@ibmx.c...	Manager	Manager ...	
External	John	Smith	IBM	jsmith@ibmx.co...			
External	Bob	Tarantula	IBM	btarantula@ib...			
External	Jane	Olguin	IBM	jolguin@ibmx.c...			
External	Darryll	Jones	IBM	djones@ibmx.c...			
External							
External							
External							
External							
External							

Add 10 more rows

Save

Cancel

Add 1 off or in a batch!

Briefing: Facilitation & Planning



ACCESS: HOME → EXPERIENCE → BRIEFING → LOGISTICS

- New fields to track
- Engagement Notes
 - Catering Notes
 - Travel & Transportation Notes
 - Culture & Translation Notes



Bank of America

Overview

Agenda

Attendees

Facilitation

Impressions

Evaluations

Wrap-up

More

Engagement Logistics

Engagement Notes

B I U

Enter Engagement Notes...

Meal & Catering Notes

B I U

Enter Meal & Catering Notes...

Travel & Transportation Notes

B I U

Enter Travel & Transportation Notes...

Culture & Translation Notes

B I U

Enter Culture & Translation Notes...

New York Signet Experience Center

Planning Report

Engagement Details

MLB Executive Briefing

Major League Baseball

New York Signet Experience Center | Room 2
Thu, Dec 09 | 8:00 am - 1:00 pm

Opportunity Details

Name: N/A | ID: N/A

Amount: N/A | Probability: N/A | Close Date: N/A

Notes: N/A

Account Details

CRM ID: N/A

Revenue: N/A

Industry: Recreation

Description: N/A

Facilitation Details

Engagement Notes: Testing the facilitation boxes.

In tincidunt efficitur enim in congue. Mauris ut condimentum enim, id tempus lectus. Curabitur pretium velit mauris, quis volutpat odio consequat vel. Maecenas mi felis, suscipit non auctor a, aliquam nec ipsum. Mauris vulputate mattis lacus id iaculis. Phasellus fermentum laoreet nisi, id dapibus libero mollis non. Duis tincidunt rhoncus mauris, nec feugiat massa tincidunt eu. In urna tortor, tristique in ultricies vel, consectetur et magna. Etiam gravida sodales molestie. Aliquam nec diam vitae orci bibendum placerat in eu quam.

Meal & Catering Notes: Testing the facilitation boxes. (Catering)

Donec velit quam, elementum a venenatis vel, consectetur sed dui. Proin auctor auctor ex, quis consectetur mauris scelerisque sit amet. In sed suscipit ante, in hendrerit eros. Sed porttitor a ipsum non porttitor. Sed molestie libero condimentum ultricies efficitur. Cras convallis porta libero ac lobortis. In fermentum lobortis ipsum, eget feugiat nisi eleifend et. Nullam vehicula lorem a lectus accumsan, at tempor metus commodo. Praesent hendrerit, lorem id auctor ornare, justo lacus lobortis nunc, a bibendum tellus odio nec erat. Donec

nexus | Accelerating Opportunities

New York Signet Experience Center

Planning Report

apibus nisl massa non ex.

(rtation)

pin auctor auctor ex, quis consectetur porttitor a ipsum non porttitor. Sed ero ac lobortis. In fermentum lobortis umsan, at tempor metus commodo. bibendum tellus odio nec erat. Donec apibus nisl massa non ex.

pin auctor auctor ex, quis consectetur porttitor a ipsum non porttitor. Sed ero ac lobortis. In fermentum lobortis umsan, at tempor metus commodo. bibendum tellus odio nec erat. Donec apibus nisl massa non ex.

nexus | Accelerating Opportunities

Briefing: Facilitation



- Activate 2nd time zone for Customer Portal
- Add or manage the video conference detail here
- URL will generate a clickable link on the Customer Portal Home Page for the user
- Add additional details such as Meeting ID, Password or Phone Number

Show Additional Time Zone
☒ Yes
This will display a second time for your attendees to reference if they are located in a different time zone.

Additional Time Zone *
PST-Pacific Standard Time

Enable Video Conference
☒ Yes
This will share video conference information with the attendees in the Customer Engagement App.

Video Conference Provider Logo
Zoom

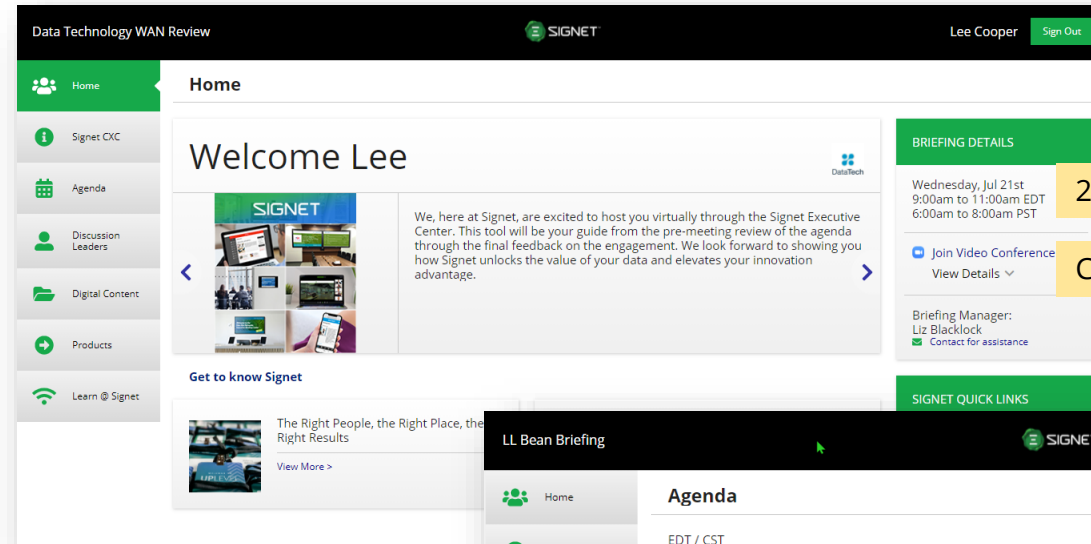
Meeting URL *
www.zoom.com/login

Meeting ID
2348924uy823409-

Participant ID

Meeting Password

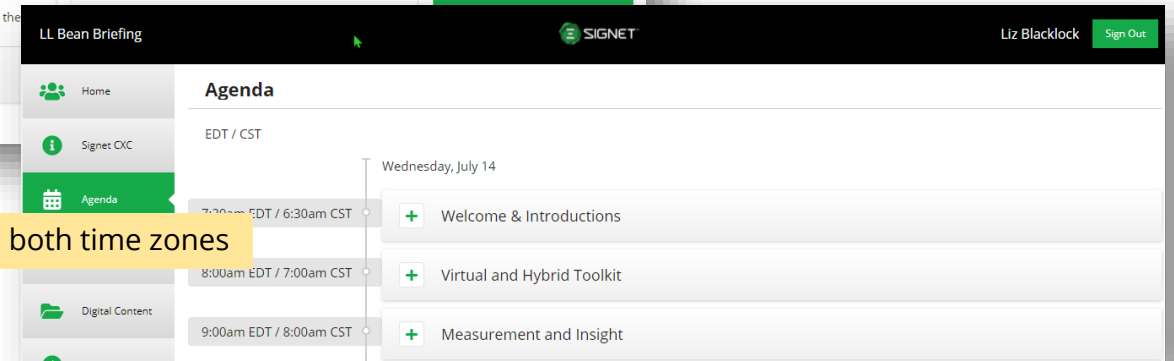
Meeting Phone Number
800-000-0000



2nd Time Zone

Conference Mtg

Agenda displays both time zones



Briefing: Experiences - Content



Virtual Screens

Virtual Welcome Additional Media

Upload

Optimal media size is 1280px wide or 720px tall. Supported media types include JPG and PNG.

Show Default Additional Media

☒ Yes

Customer Engagement App

CE App Customer Media

= Signet+ABPM+2020+Sprin...

Upload

Supported media types include jpg,jpeg,png,mp4,pdf,mov,wmv.

Add briefing specific Virtual Warmer Content

Virtual Etiquette
Conference Announcement
Magic Quadrant updates
Industry related content
Leadership Quotes

Add briefing specific Digital Content for the Customer Portal

Discussion Leader Content
Briefing Prep Content

Briefing: Experiences / Salutations & Quick Links

Salutations [Add Salutation](#)

ORDER	SALUTATION NAME	AVAILABILITY
Salutation messages added here will replace the default salutation messages.		

Personalize any phase salutation at the briefing level
Custom Welcome
Lunch announcements
Welcome Back language

Add additional quick links, additive to existing list
Specific Press Release
Specific Webpage
Lunch Orders

Quick Links [Add Quick Link](#)

ORDER	DISPLAY NAME	URL/APPLICATION TAB	AVAILABILITY
Quick links added here will be additions alongside the default quick links.			

Briefing: Experiences –Application Tabs



Application Tabs			
ORDER	TAB NAME	PAGE TITLE	AVAILABILITY
1	Home	Home	Pre-Briefing, Day-of-Briefing, Post-Briefing
2	Digital Content	Digital Content	Pre-Briefing, Day-of-Briefing, Post-Briefing
3	Feedback	FeedbackTest	Day-of-Briefing, Post-Briefing
4	Signet CXC	Signet CXC	Pre-Briefing, Day-of-Briefing, Post-Briefing
5	Agenda	Agenda	Pre-Briefing, Day-of-Briefing, Post-Briefing
6	Discussion Leaders	Discussion Leaders	Pre-Briefing, Day-of-Briefing, Post-Briefing
7	Concierge	Concierge	Pre-Briefing, Day-of-Briefing, Post-Briefing
8	User Group Recording	User Group Recording	Disabled



Personalize tab visibility at the briefing level

Set for specific phase or disable fully

Application Tab Details

Standard, Discussion Leaders

Show in Briefing Instance

☒

Pre-Briefing

☒

Day of-Briefing

☒

Post-Briefing

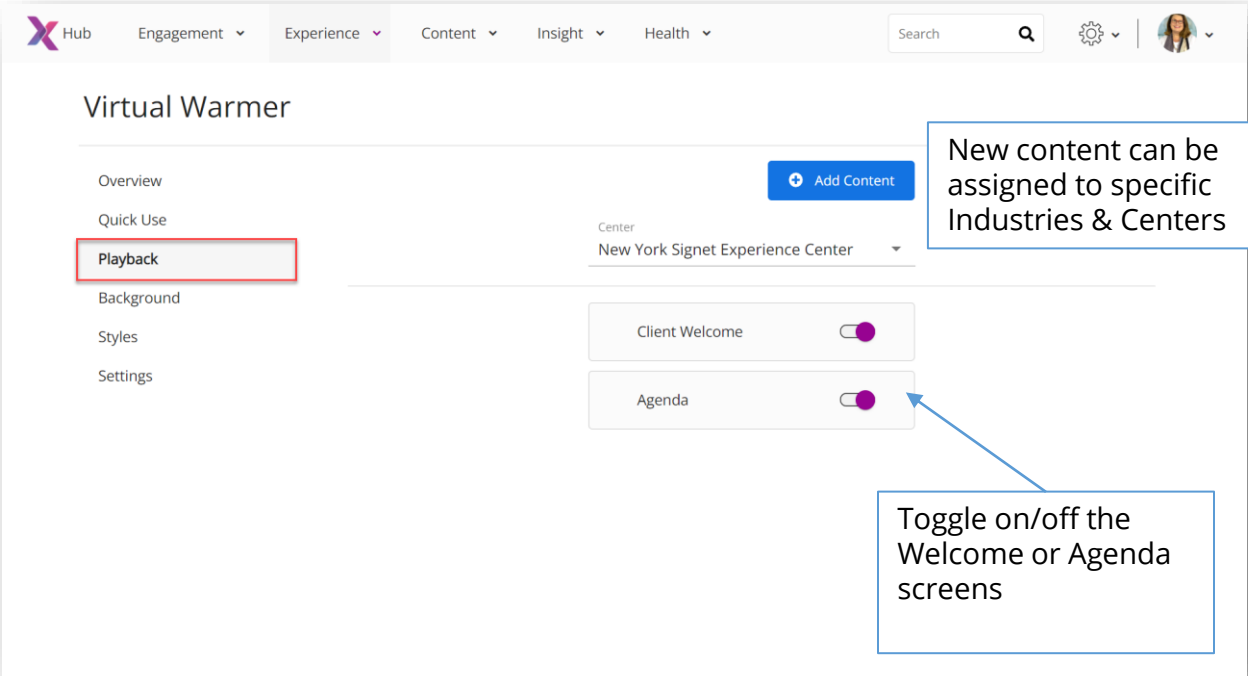
Save

Cancel

Briefing: Virtual Warmer Content



ACCESS: HOME → EXPERIENCE → VIRTUAL WARMER → **PLAYBACK**



Industry/Brand Aligned
Industry aligned imagery/branding
Client Welcome and Agenda Toggle



Agenda + speakers
Agenda with session description
Speaker image, name and title



Time Visible
Time and 2nd time zone visible on left hand
Break / Countdown timer



Additional Content Slides
Internal/External Team Slides
Set global content
Add different types of content PER Briefing

General Content



Industry Content



Customer Stories



Leadership Content



Sharing the Customer Portal: Email



Email to attendees for welcome, evals or general communication.

Briefing Details
Account: [Github](#)
Customer Briefing | In-Person
NYC Signet Experience Center
Briefing Manager: [Alex Maniuk](#)
Thu, Nov 4, 2021 | 5:00am - 2:30pm EDT
Green Room
PIN: rSbjes1R

Engagement Reports
Planning Report
Calendar invite
Customer Portal Direct Access Link
Customer Portal General Access Link
Email
Copy



Select Attendees to Receive The CE App Access Link

All

ATTENDEE	TYPE
<input checked="" type="checkbox"/> Liz Blacklock liz.blacklock@signet.tv	INTERNAL
<input type="checkbox"/> Shankar Shahai shankar.sahai@signet.tv	EXTERNAL

You can preview and edit the template on the next screen.

NextCancel



Preview and edit the email to be sent.

Subject Text
{{tenant.name}} invites you

Email body *

B I U

Dear {{attendee.firstName}}

We are looking forward to your upcoming briefing. Since we can't meet in person just yet, we want to offer you a digital briefing experience where you can view your agenda and discussion leaders, browse through content on our site, as well as provide your feedback all in one location.

[Here is your Signet Customer Engagement Portal](#)

We want to give you an opportunity to familiarize yourself with the platform prior to the briefing. Don't worry, we will send you the link again the day prior to your briefing for easy access.

Regards,
Signet {{center.name}}

SendCancel

Share the Customer Portal: General Access Link



General access point for attendees.

Briefing Details

Account: [Github](#)
Customer Briefing | In-Person
NYC Signet Experience Center
Briefing Manager: [Alex Maniuk](#)
Thu, Nov 4, 2021 | 5:00am - 2:30pm EDT
Green Room
PIN: rSbjes1R

Engagement Reports

Planning Report

Calendar invite

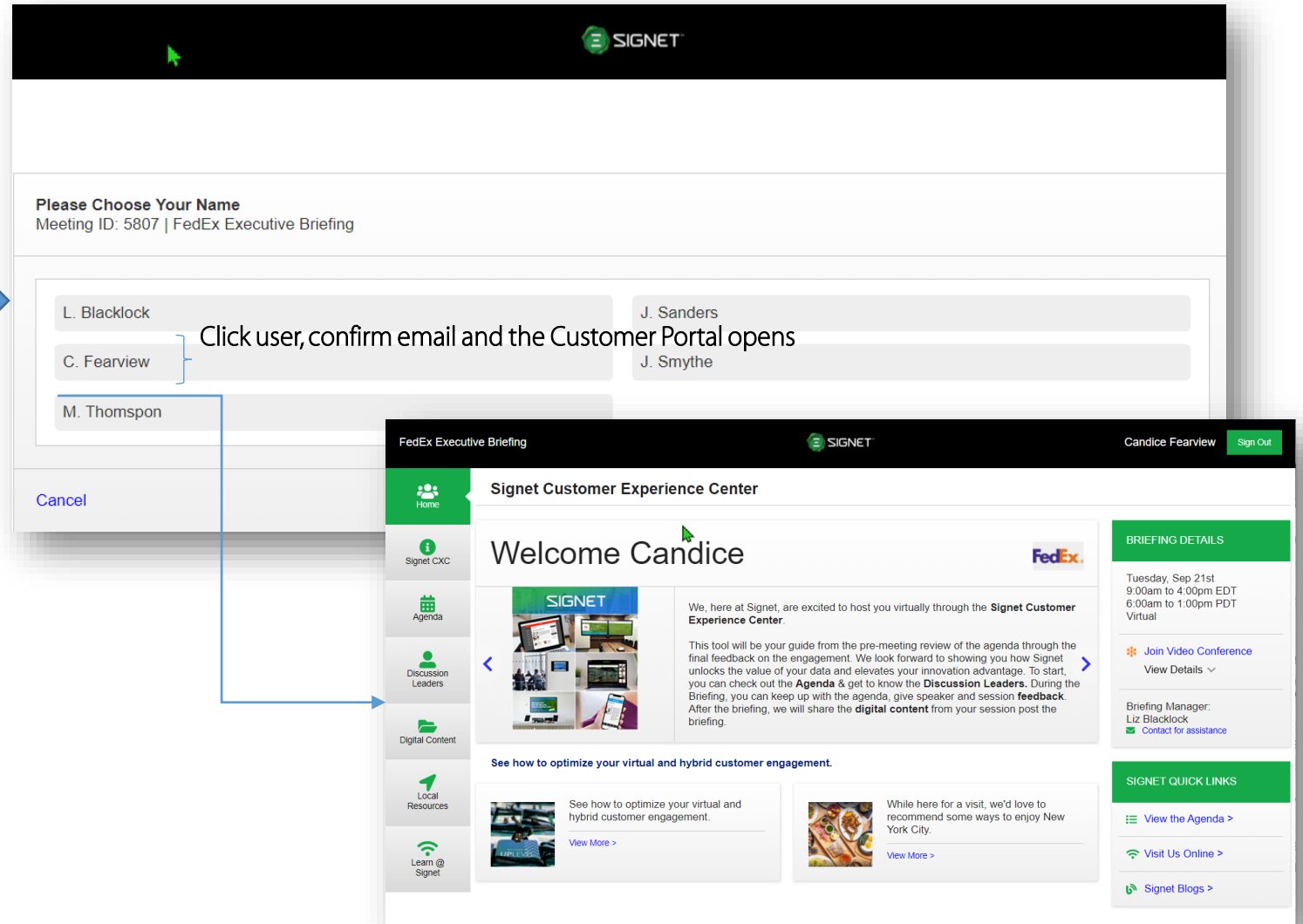
Customer Portal Direct Access Link

Customer Portal General Access Link

Email

Copy

Share the
URL or



Day of Experience

Virtual Welcome: Launch or Share URL



Briefing Details

Account: [Github](#)
Customer Briefing | In-Person
NYC Signet Experience Center
Briefing Manager: [Alex Maniuk](#)
Thu, Nov 4, 2021 | 5:00am - 2:30pm EDT
Green Room
PIN: rSbjes1R

Engagement Reports

Planning Report
[Preview](#) | [Download](#)

Wrap-up Report
The briefing has not started yet.

Launch

Print

Virtual Warmer

Copy

Briefing Details

Account: [Github](#)
Customer Briefing | In-Person
NYC Signet Experience Center
Briefing Manager: [Alex Maniuk](#)
Thu, Nov 4, 2021 | 5:00am - 2:30pm EDT
Green Room
PIN: rSbjes1R

Engagement Reports

Planning Report
[Preview](#) | [Download](#)

Wrap-up Report
The briefing has not started yet.

Launch

Email

Customer Portal General Access Link

Customer Portal QR Code

Virtual Warmer Link

Copy

VW will open in new browser window



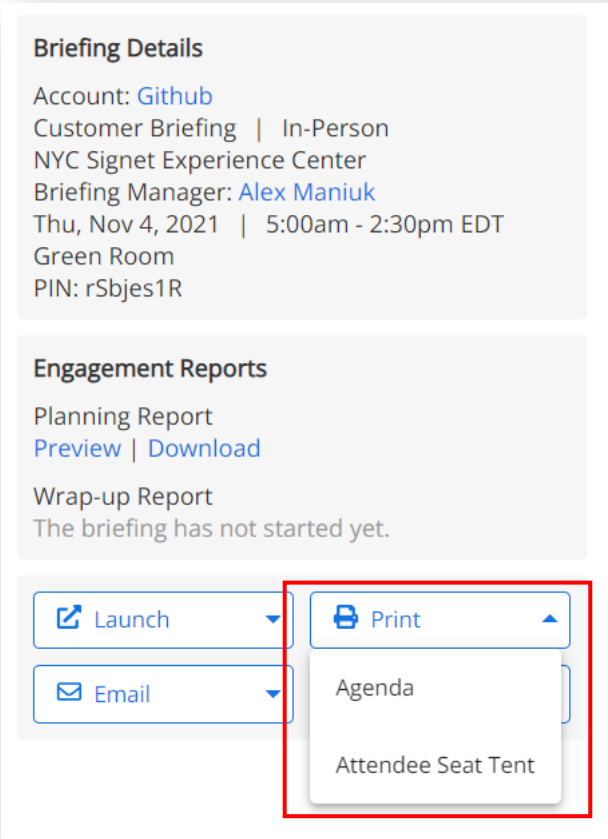
- Break controls
- Music controls
- Pause, Reverse, Forward controls

F11 is FULL SCREEN and will hide any browser detail

Printables: Execution

Agenda and Table Tents

ACCESS : Briefing Overview →
Print Agenda & Print Attendees
Seat Tents



The screenshot displays the 'Briefing Overview' page in the Nexus application. It is divided into three main sections: 'Briefing Details', 'Engagement Reports', and a bottom action bar. The 'Briefing Details' section contains text about the account (Github), briefing type (In-Person), location (NYC Signet Experience Center), manager (Alex Maniuk), date and time (Thu, Nov 4, 2021 | 5:00am - 2:30pm EDT), room (Green Room), and PIN (rSbjes1R). The 'Engagement Reports' section lists 'Planning Report' with links for 'Preview' and 'Download', and 'Wrap-up Report' with a note that the briefing has not started yet. The bottom action bar contains four buttons: 'Launch', 'Email', 'Print', and a dropdown menu. The 'Print' button is highlighted with a red rectangle, and its dropdown menu is open, showing two options: 'Agenda' and 'Attendee Seat Tent'.

Briefing Details
Account: [Github](#)
Customer Briefing | In-Person
NYC Signet Experience Center
Briefing Manager: [Alex Maniuk](#)
Thu, Nov 4, 2021 | 5:00am - 2:30pm EDT
Green Room
PIN: rSbjes1R

Engagement Reports
Planning Report
[Preview](#) | [Download](#)
Wrap-up Report
The briefing has not started yet.

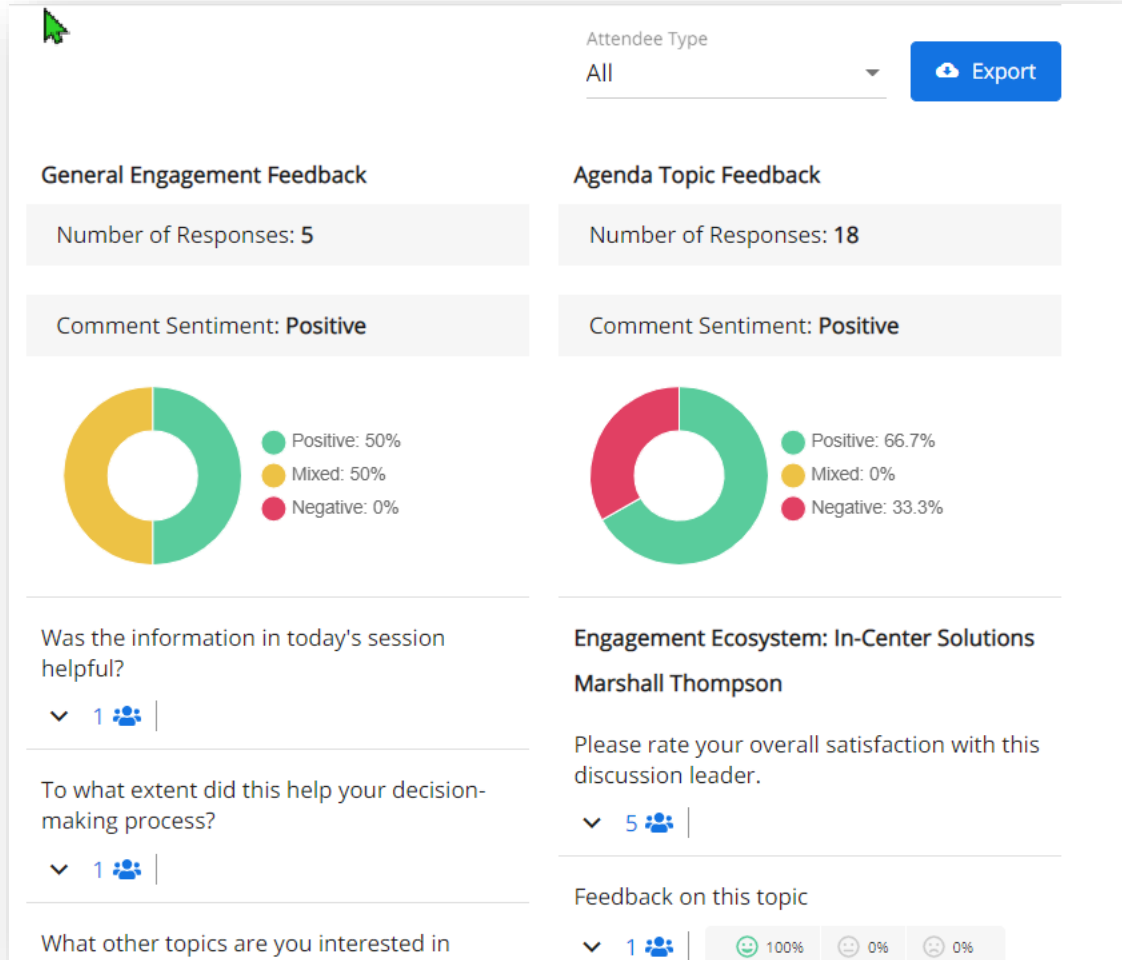
[Launch](#) [Print](#) [Email](#)

Agenda
Attendee Seat Tent

Need to add your logo? Ask me how!

Post Experience

Briefing: Evaluations



General Briefing
Feedback
Presenter Feedback

- Visual delivery
- Sentiment analysis on text answers
- Export's evaluation data for slicing and dicing

Wrap Up Report

Agenda: Section III



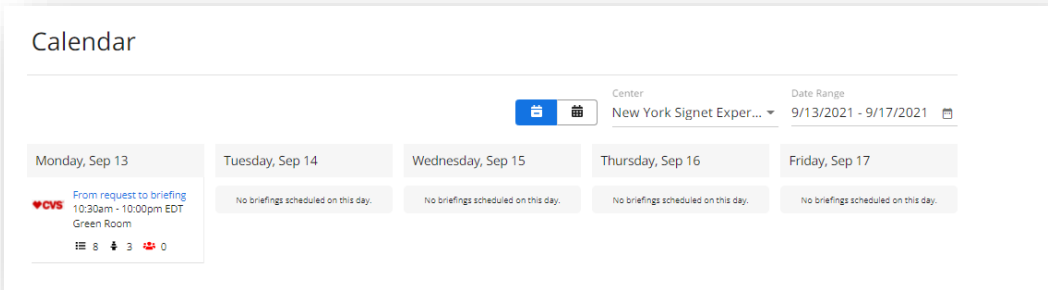
Platform Features

- Calendars, View
- Insights: Analytics & Reports
- Program Level Settings
- Customer Portal Settings, Configuration
- User Access, Levels
- Customer Portal – Profile A vs B
- Email Settings
- Printables Setup
- Sending a Meeting Invite
- Opportunities
- Virtual Welcome Settings

How do you view?



Choose between weekly or monthly views



Add'l flags

- Engagement Type
- Center
- Month/Week

Calendar

Calendar				
Engagement Type All Center New York Signet Exper... Month and Year 9/2021				
Monday	Tuesday	Wednesday	Thursday	Friday
Aug 30 No briefings scheduled on this day.	Aug 31 No briefings scheduled on this day.	Sep 01 No briefings scheduled on this day.	Sep 02 No briefings scheduled on this day.	Sep 03 No briefings scheduled on this day.
Sep 06 No briefings scheduled on this day.	Sep 07 2 Calendar Meeting 5:00am Green Room	Sep 08 2 Calendar Meeting 5:00am Room 2	Sep 09 No briefings scheduled on this day.	Sep 10 Door Monitor Demo 5:00am Room 2
Sep 13 CVS From request to briefing 10:30am Green Room	Sep 14 No briefings scheduled on this day.	Sep 15 No briefings scheduled on this day.	Sep 16 No briefings scheduled on this day.	Sep 17 No briefings scheduled on this day.
Sep 20 No briefings scheduled on this day.	Sep 21 No briefings scheduled on this day.	Sep 22 Shane 5:30am Virtual	Sep 23 No briefings scheduled on this day.	Sep 24 No briefings scheduled on this day.
Sep 27 No briefings scheduled on this day.	Sep 28 No briefings scheduled on this day.	Sep 29 No briefings scheduled on this day.	Sep 30 Citi Financial Executive Br... 10:00am Green Room	Oct 01 No briefings scheduled on this day.

Insights: Analytics



Micro Customer Engagement Stats

- Unique session stats
- Tab usage stats
- Media stats

Analytics

Customer Portal Scheduler

App Usage

Section Views

Media Metrics

TOTAL # OF DAILY SESSIONS	AVG # OF PAGE VIEWS	AVG # OF VIEWS
5	3.6	1.4

ATTENDEE NAME	CUSTOMER NAME	BRIEFING ID	DATE
Lesia Founder	(Ivy League)	394	Mon, Oct 19 PDT
Maistrenko L	(Ivy League)	394	Mon, Oct 19 PDT
Test Attendee	TestCo	315	Tue, Oct 20 PDT
e a	Apple - Int	377	Tue, Oct 19 PDT
Test Attendee	TestCo	416	Tue, Oct 19 8:29 PDT

Rows per page: 10 1 - 5 of 5

Analytics

Customer Portal Scheduler

App Usage

Section Views

Media Metrics

AVG # OF VIEWS	AVG # OF VIEWS PER BRIEFING
6	1.5

SECTION NAME	SECTION TYPE
Home	Standard
Feedback	Standard
Media	Standard

Analytics

Customer Portal Scheduler

App Usage

Section Views

Media Metrics

Date Range: 10/16/2021 - 10/20/2021 Center: Silicon Valley Signet Industry: All Export

TOTAL # OF VIEWS	AVG # OF VIEWS	TOTAL # EMAILED	AVG # EMAILED
7	0.6	12	1

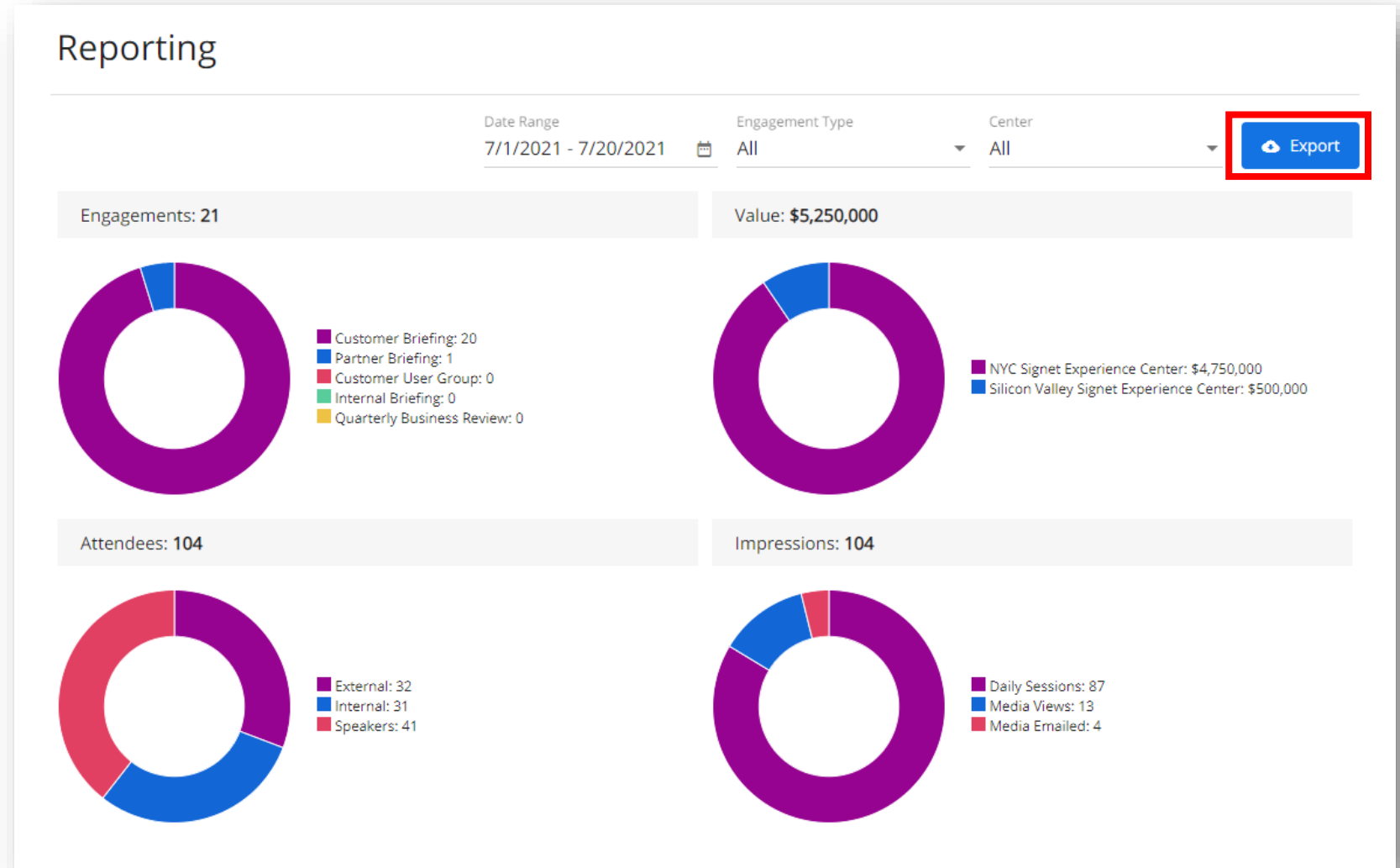
MEDIA NAME	FILE TYPE	# OF VIEWS	# OF EMAILS	MEDIA TYPE	INDUSTRY
123456_For test	image	1	2	Related Media	Education
qr code	image	1	1	Customer Media	Agriculture, Apparel, Banking,...
Media1	image	1	1	Customer Media	Agriculture, Apparel, Banking,...
Media2	image	2	1	Customer Media	Agriculture, Apparel, Banking,...

Export the data to slice and dice as desired

Insights: Reports

Macro Program Stats

- Engagement Type stats
- Attendee Stats
- Opp Value Stats
- Media Stats
- Additional industry and center detail breakouts available



Program Level Settings*



Left Nav Category	
Centers	View Center Details <i>(for new or changes to center, please contact your CSM)</i>
Rooms	View or edit room detail
Industries	View or edit Industries
Engagement Types	View or edit Briefing Types
Topic Categories	View or edit Topic Categories
Agenda Templates	View or edit Agenda Templates
Evaluations	View or edit Evaluation questions <i>(any edits will take place in a future created briefing)</i>
Emails	View or edit email templates
Email Settings	View or edit email settings

X HubEngagementExperienceContentInsightHealth

Programs

Centers

Rooms

Industries

Engagement Types

Topic Categories

Agenda Templates

Evaluations

Emails

Email Settings

ID	CENTER NAME	CITY
1	Silicon Valley Signet	San Jose
2	New York Signet Experience Center	New York

⚙️

*We will work with you to setup the program level settings before go live so this is focused on ongoing maintenance only

Key Program Level Considerations



Left Nav Category	
Centers	View Center Details <i>(for new or changes to center, please contact your CSM)</i>
Rooms	View or edit room detail
Industries	View or edit Industries
Engagement Types	View or edit Briefing Types
Topic Categories	View or edit Topic Categories
Agenda Templates	View or edit Agenda Templates
Evaluations	View or edit Evaluation questions <i>(any edits will take place in a future created briefing)</i>
Emails	View or edit email templates
Email Settings	View or edit email settings

ID	INDUSTRY NAME
4103	Ads and Media Space
4104	Aerospace
1111	Agriculture
1112	Apparel
1360	Artificial Intelligence
1113	Banking

ORDER	ENGAGEMENT NAME	TYPE
= 1	Customer Briefing	Customer Standard
= 2	Customer User Group	Customer
= 3	Partner Briefing	Partner Standard
= 4	Internal Briefing	Internal Standard
= 5	Test Briefing	Test Standard

- *Industry triggers what digital content is available through the Customer Portal
- *Engagement types triggers salutation messaging through the Customer Portal

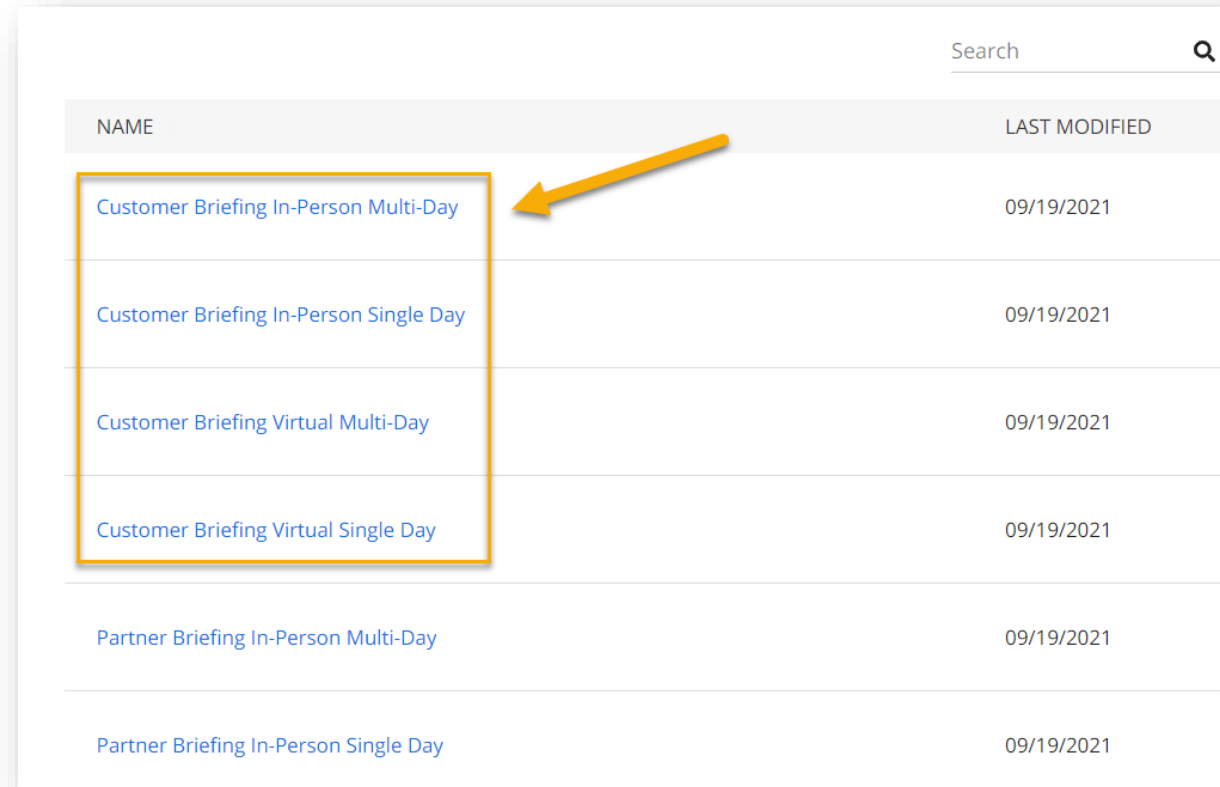
Key Program Level Considerations



Agenda Templates

Left Nav Category

Centers	View Center Details <i>(for new or changes to center, please contact your CSM)</i>
Rooms	View or edit room detail
Industries	View or edit Industries
Engagement Types	View or edit Briefing Types
Topic Categories	View or edit Topic Categories
Agenda Templates	View or edit Agenda Templates
Evaluations	View or edit Evaluation questions <i>(any edits will take place in a future created briefing)</i>
Emails	View or edit email templates
Email Settings	View or edit email settings



A screenshot of a web application interface showing a table of Agenda Templates. The table has two columns: 'NAME' and 'LAST MODIFIED'. The first four rows are highlighted with a yellow box, and a yellow arrow points to the first row. The rows are: 'Customer Briefing In-Person Multi-Day', 'Customer Briefing In-Person Single Day', 'Customer Briefing Virtual Multi-Day', and 'Customer Briefing Virtual Single Day'. Below these are two more rows: 'Partner Briefing In-Person Multi-Day' and 'Partner Briefing In-Person Single Day'. A search bar is visible at the top right of the table.

NAME	LAST MODIFIED
Customer Briefing In-Person Multi-Day	09/19/2021
Customer Briefing In-Person Single Day	09/19/2021
Customer Briefing Virtual Multi-Day	09/19/2021
Customer Briefing Virtual Single Day	09/19/2021
Partner Briefing In-Person Multi-Day	09/19/2021
Partner Briefing In-Person Single Day	09/19/2021

*Setup Template agendas with the basic agenda items already included

*One per briefing type and in-person/virtual

Key Program Level Considerations



Left Nav Category

Centers	View Center Details <i>(for new or changes to center, please contact your CSM)</i>
Rooms	View or edit room detail
Industries	View or edit Industries
Engagement Types	View or edit Briefing Types
Topic Categories	View or edit Topic Categories
Agenda Templates	View or edit Agenda Templates
Evaluations	View or edit Evaluation questions <i>(any edits will take place in a future created briefing)</i>
Emails	View or edit email templates
Email Settings	View or edit email settings

Question Level		Attendee Type	+ Add Question
ORDER	QUESTION	FORMAT	
= 1	How much did this virtual visit experience influence your decision to conduct		
= 2	Please rate your overall satisfaction with this discussion leader.		
= 3	Was the information in today's session helpful?		
= 4	Is there any other feedback you'd like to give?		

Center

NYC Signet Experience Center

Email subject *

Signet Training is excited to welcome you!

Email body *

B **I** **U**

Components

Dear {{attendee.firstName}}

We are looking forward to your upcoming refresher training on the CenterSuite Platform.

As a training experience, we created a briefing and are sharing the Customer Engagement App with you. You can view your agenda, browse through content, as well as provide your feedback all in one location.

[Here is your Signet Customer Engagement Portal](#)

*Evaluations → Use consistent evaluation questions, should be part of initial setup

*Emails → Customize the email templates throughout the Nexus Hub Platform

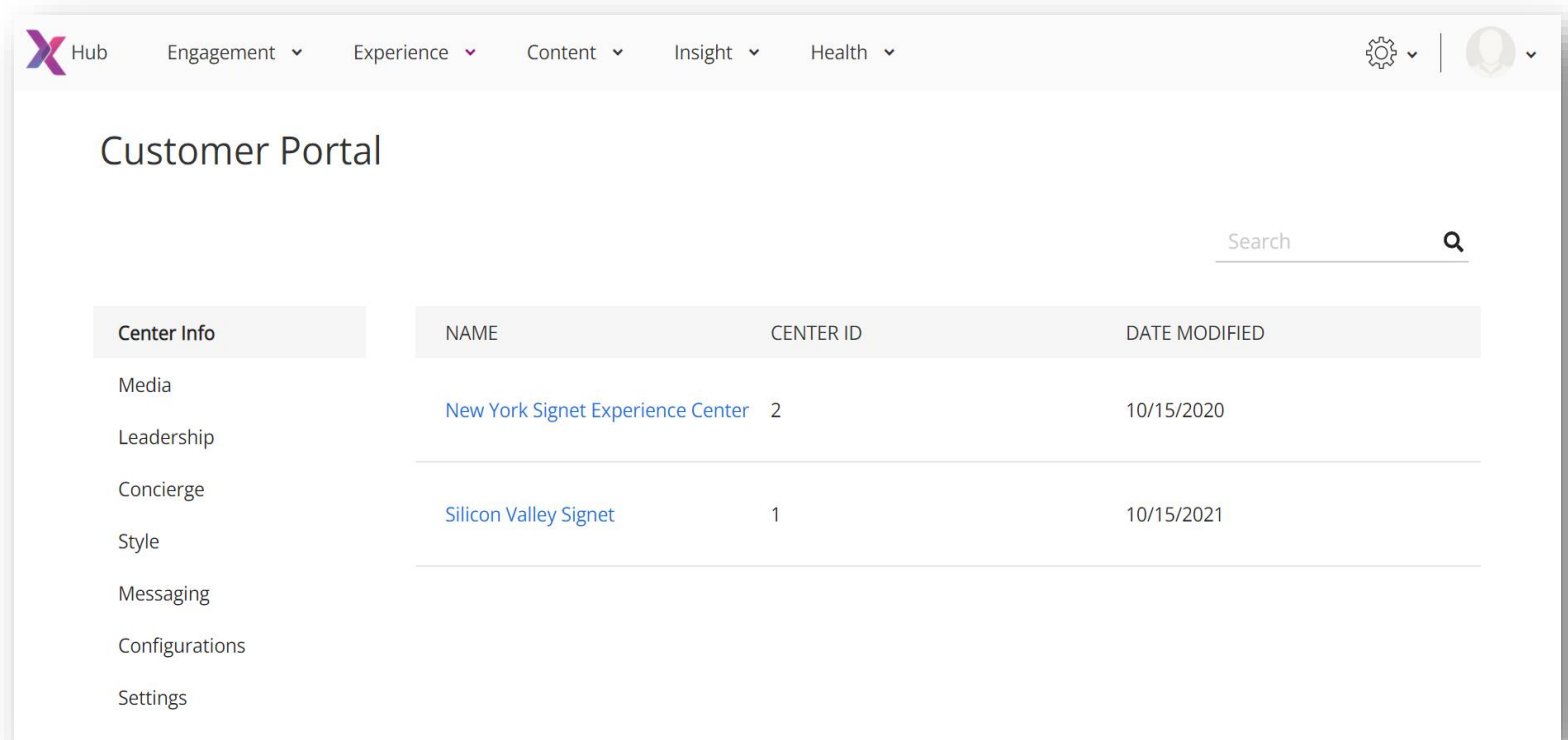
Experiences: Customer Portal & Virtual Welcome



Setting default behavior for the Customer Portal!

Left Nav Category

Center Info	View or edit center info
Media	View or edit media library
Leadership	View or edit leadership
Concierge	View or edit concierge detail
Style	View or edit style detail
Messaging	View or edit messaging (Salutation)
Configuration	Customer Portal Default Details
Settings	Customer Portal Default Settings

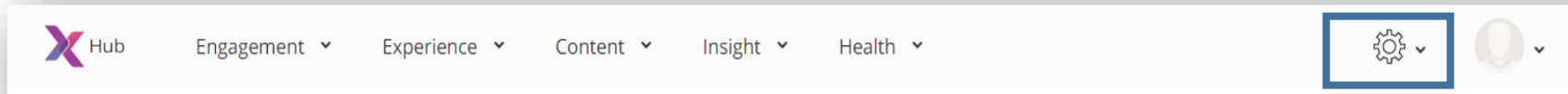


*We will work with you to setup the program level settings before go live so this is focused on ongoing maintenance only

Users: Program Manager can create new users



Along the top of the platform, click on the COG



Add new users by unique email, assign program role and center assignment!

Users

Centers

All

Search

Oleksii Markichev

Admin

Program Staff

09/19/2021

Denys Denysenko

Admin

Program Staff

09/19/2021

Marvna Kholod

Admin

Program Staff

09/19/2021

Users have 7 days to login with temp password. If not used, delete the user and recreate them to resend a new temp password.

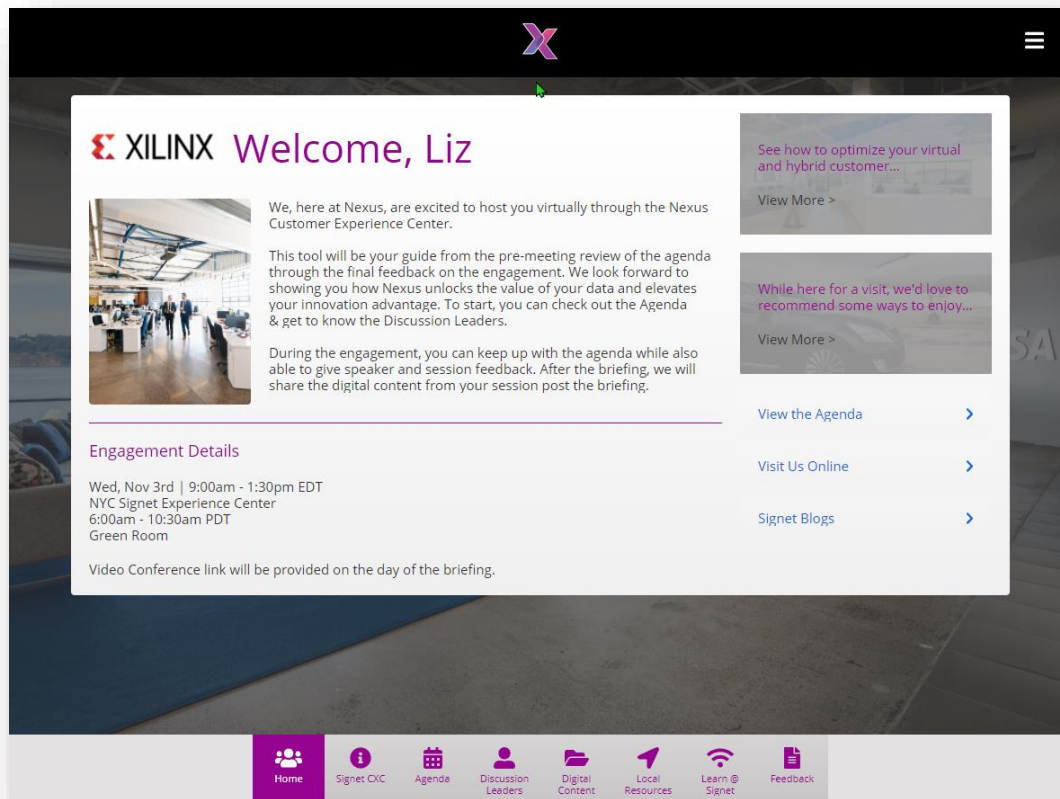
Customer Portal: 2 Profile Views



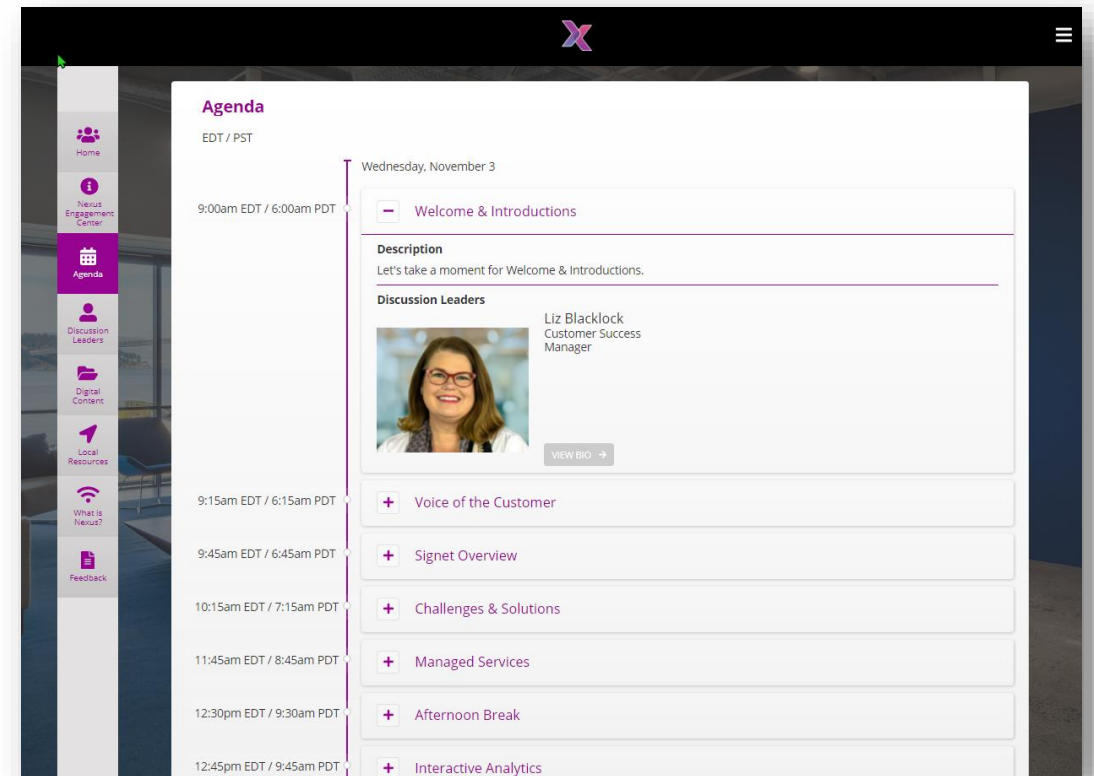
ACCESS: HOME → EXPERIENCE → CUSTOMER PORTAL → SETTINGS

Center setting for Customer Portal views

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



Profile A: Bottom Nav



Profile A: Left Nav

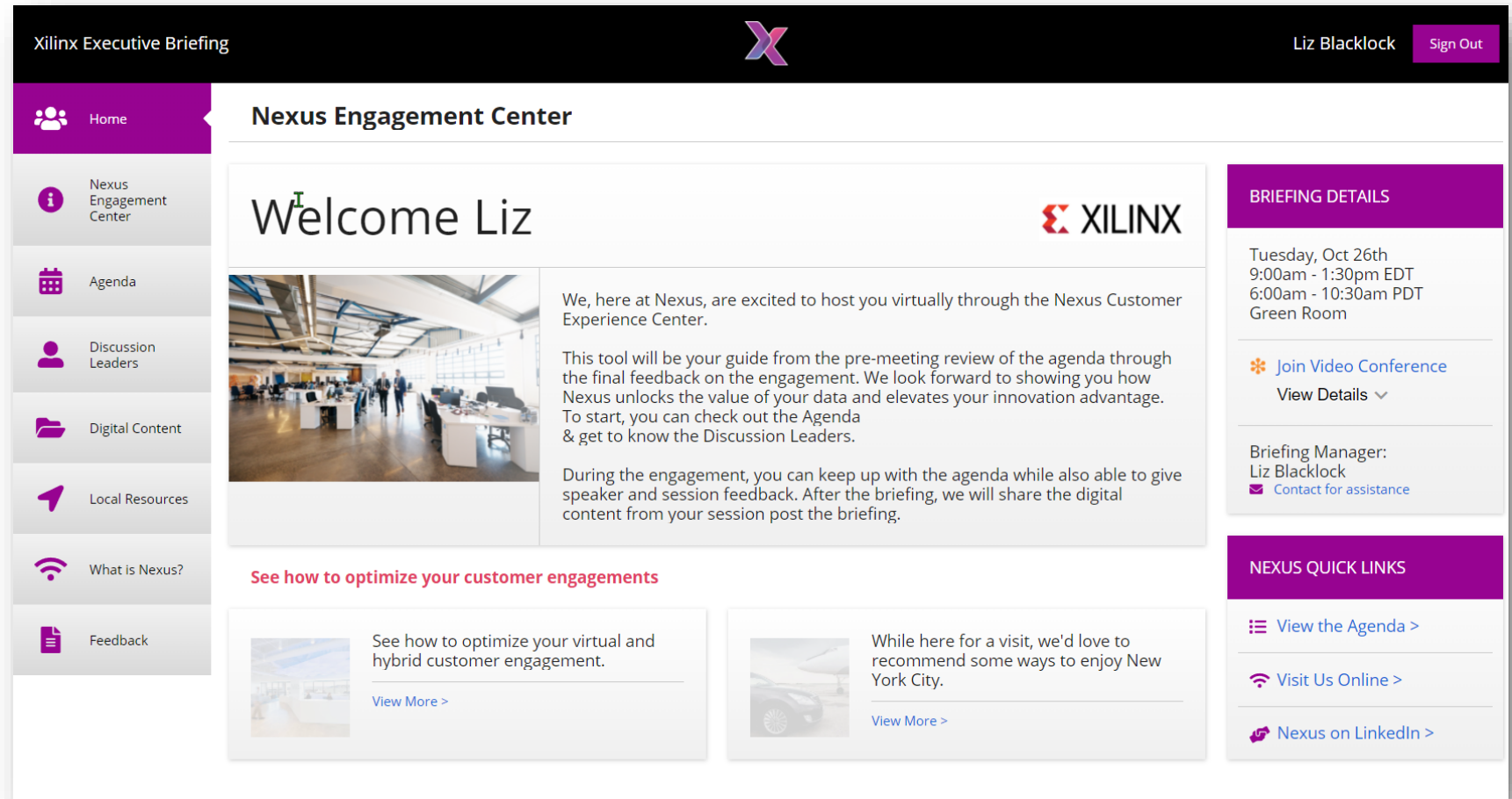
Customer Portal: 2 Profile Views



ACCESS: HOME → EXPERIENCE → CUSTOMER PORTAL → SETTINGS

Center setting for Customer Portal views

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



Profile B: Default

Email Settings



ACCESS: PROGRAM → EMAIL SETTINGS

Add an email alias and an email header.


Programs

- Centers
- Rooms
- Industries
- Engagement Types
- Topic Categories
- Agenda Templates
- Evaluations
- Emails
- Email Settings**

Email Alias Name

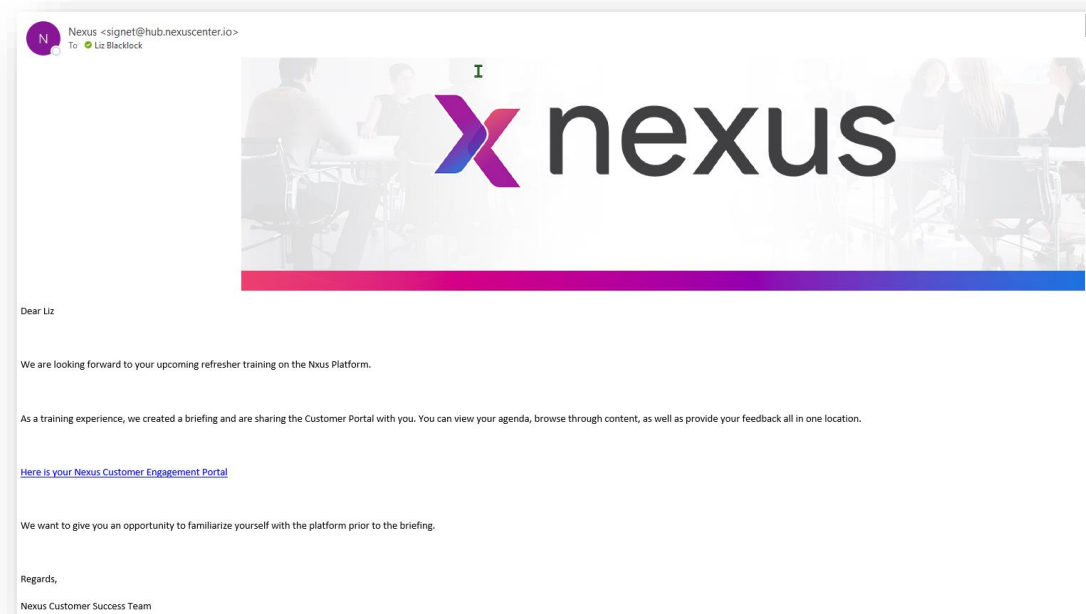
Nexus

Email Header Graphic

 NEXUS-2021-HubSpot-Email... ✕

Optimal media size is 800px wide and 100px tall. Supported media types include JPG and PNG.

Save Cancel



Printables: Setup



Agenda

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

Table Tents

- Show QR Code
- Job Title

Agenda

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

This is a screenshot of the 'Agenda' tab within the 'Printables Setup' modal. At the top right is a blue 'Preview' button. Below it is a dropdown menu labeled 'Center' with 'NYC Signet Experience Center' selected. The main section contains several settings: 'Welcome Text Color *' is set to '#333333' with a black color swatch; 'Show Host Logo' is a toggle switch set to 'No'; 'Show Customer Portal General Access QR Code' is a toggle switch set to 'Yes'; and 'Show Attendee Job Title' is a toggle switch set to 'Yes'. At the bottom are 'Save' and 'Cancel' buttons.

This is a screenshot of the 'Table Tents' tab within the 'Printables Setup' modal. At the top right is a blue 'Preview' button. Below it is a dropdown menu labeled 'Center' with 'NYC Signet Experience Center' selected. The main section contains several settings: 'Briefing Name Text Color *' is set to '#333333' with a black color swatch; 'Agenda Topic Text Color *' is set to '#333333' with a black color swatch; 'Show Host Logo' is a toggle switch set to 'No'; 'Show Customer Portal General Access QR Code' is a toggle switch set to 'Yes'; 'Show Client Logo with Welcome' is a toggle switch set to 'Yes'; 'Show Salutation Message' is a toggle switch set to 'Yes'; 'Show Agenda Topic Name in All-Caps' is a toggle switch set to 'Yes'; 'Show Agenda Descriptions' is a toggle switch set to 'Yes'; 'Show Speakers' is a toggle switch set to 'Yes'; and 'Show Speaker Title' is a toggle switch set to 'Yes'.

Customer Portal: Sending a Meeting Invite



Email to attendees for welcome, evals or general communication.

Briefing Details
Account: [Github](#)
Customer Briefing | In-Person
NYC Signet Experience Center
Briefing Manager: [Alex Maniuk](#)
Thu, Nov 4, 2021 | 5:00am - 2:30pm EDT
Green Room
PIN: rSbjes1R

Engagement Reports
Planning Report

Calendar invite

Customer Portal Direct Access Link

Customer Portal General Access Link

Email

Copy

Select Attendees to Receive The CE App Access Link

All

ATTENDEE	TYPE
<input checked="" type="checkbox"/> Liz Blacklock liz.blacklock@signet.tv	INTERNAL
<input type="checkbox"/> Shankar Shahal shankar.sahal@signet.tv	EXTERNAL

You can preview and edit the template on the next screen.

Next

Cancel

Preview and edit the email to be sent.

Subject Text *
{{center.title}} - Briefing Invite

Email body *

B **I** **U**

Components

We are pleased to host you at our briefing, this is our calendar invite for you to save.

Briefing Name:
{{briefing.name}}

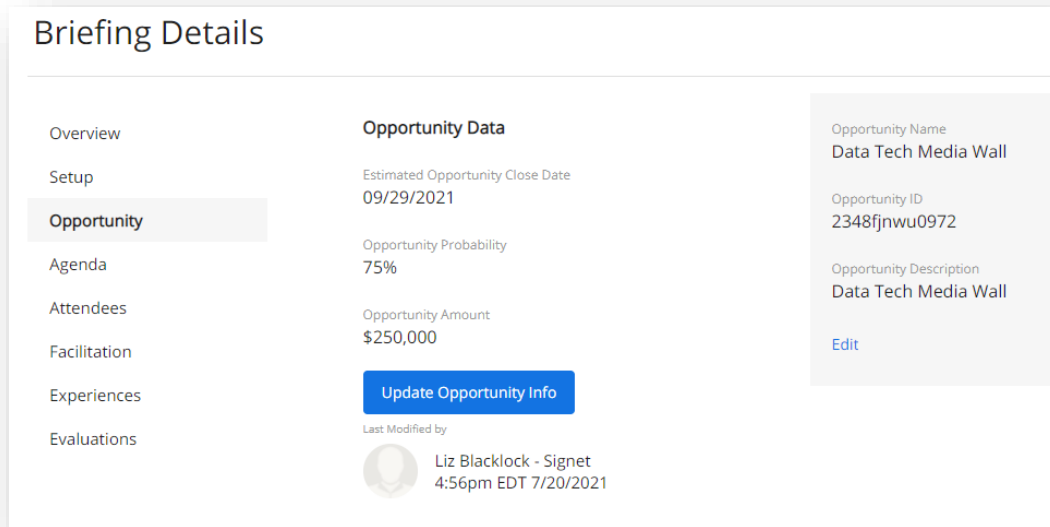
Date & Time:
{{briefing.scheduledStartAt}}

Your Briefing Manager:
{{briefingManager.fullName}}

Agenda:
{{briefing.agenda}}

Briefing: Opportunity

Tracking the opportunity data for this briefing.



The screenshot shows the 'Briefing Details' page with a sidebar menu on the left containing 'Overview', 'Setup', 'Opportunity' (highlighted), 'Agenda', 'Attendees', 'Facilitation', 'Experiences', and 'Evaluations'. The main content area is titled 'Opportunity Data' and displays the following information: 'Estimated Opportunity Close Date' as 09/29/2021, 'Opportunity Probability' as 75%, and 'Opportunity Amount' as \$250,000. A blue button labeled 'Update Opportunity Info' is visible. Below this, it says 'Last Modified by' followed by a user profile icon and the text 'Liz Blacklock - Signet 4:56pm EDT 7/20/2021'. On the right side of the main content area, there is a grey box containing 'Opportunity Name' (Data Tech Media Wall), 'Opportunity ID' (2348fjnwu0972), and 'Opportunity Description' (Data Tech Media Wall), with a blue 'Edit' link at the bottom.

Opportunity Data

Did the Opportunity Close? *

No

Estimated Opportunity Close Date *

9/29/2021

Opportunity Probability (%) *

75%

Opportunity Amount *

\$250,000.00

Save

Cancel

Required Fields

- Opportunity Name
- Amount
- Probability
- Description
- Expected Close

Update to edit

- Closed?
- Update Close Date
- Amount or

Q: How do I edit the Opp Detail?

A: Click on the **Blue Update** to edit

Virtual Welcome: Music



Add music to your Virtual Experience

ACCESS : EXPERIENCES → VIRTUAL WELCOME → SETTINGS

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

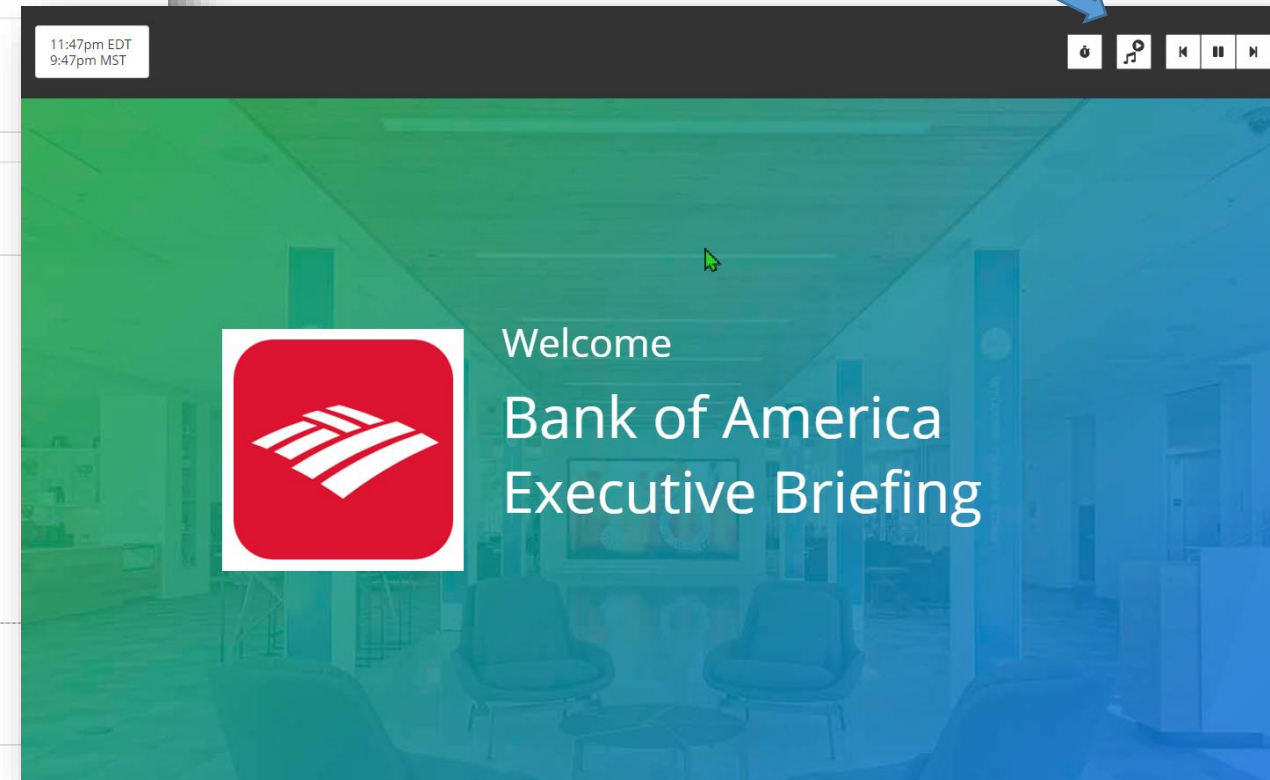
Audio

Speaker Label *
Discussion Leader

Show Speaker Headshot
☒ On

Default Additional Media

Control the music here!



Recommended Defaults & Review Cycle



Tab Setup/Defaults

Pre-Briefing

→ Center Info / Agenda / Media

Day Of Briefing

→ Center Info / Agenda / Feedback /
Speakers / Media

Post Briefing Experience

→ Agenda / Feedback / Speakers / Media

Quarterly review

- Media
- Leadership
- Branding/Style
- Center Info – Images
- Salutation changes

Planning

- Meeting type updates

What questions do you have?

- Support: support@nexuscenter.io
- FAQ Site: <https://info.signet.tv/knowledge>