

Support EXP

EXP Actionable Analytics Portal

4th Quarter 2024 Release Notes | December 2024

Voice of the Member

STRATEGIES & ANALYTICS



At Support EXP, collaborative innovation is part of our DNA. We are continuously updating and adding new features to our EXP Actionable Analytics Portal to increase the value of your feedback data. We are pleased to release **the latest round of upgrades**.

In this document, you will find details on all the changes we have made to the Portal. These changes were developed based on direct input from you and other Support EXP clients. Bullet points under each listed change or feature will include the **benefit to you**.

We hope these new features are exactly what you need to manage the member journey, optimize your organizational results, and deliver **world-class** experiences every day!

Contents

New Login Page, Header/Footer and Logo Updates.....	3
Updated Login/Forgot Your Password Interface	3
Simplified Footer (w/View Scale Showing Above)	4
Updated Charts in Insight Builder.....	4
Updated Charts in Relationship Builder and Team Builder.....	5
Multi-Select Report Options	6
Renamed Insight Builder Reports	7
Main (Menu) Report Name Changes.....	7
Sub-Report Name Changes	8
Other Enhancements	9

Questions? Reach out to us:

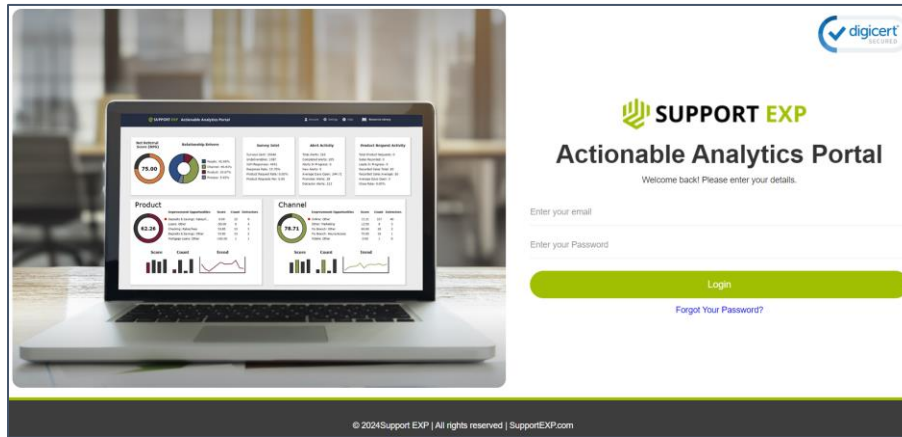
Lew Thomson

VP, Client Success
800.444.5465 x 166

lthomson@supportexp.com

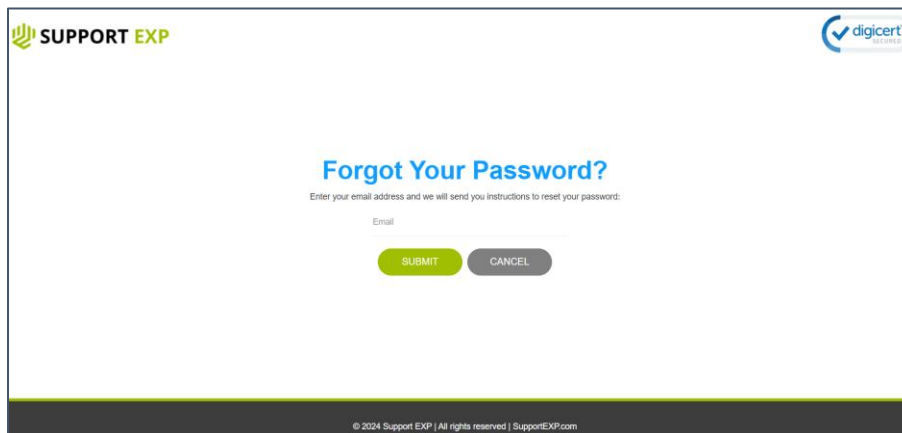
New Login Page, Header/Footer and Logo Updates

- redesigned login page enhances security and accessibility
- updated headers and footers allow seamless navigation
- updated logo reflects our commitment to innovation and user experience



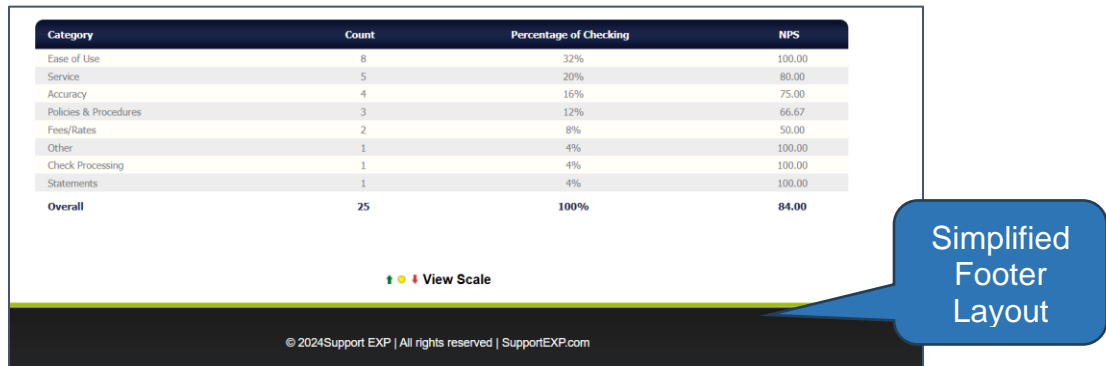
Updated Login/Forgot Your Password Interface

- new login interface offers enhanced security features, ensuring your data is protected at all times
- faster loading times and a streamlined design makes logging in easier and more efficient, saving you effort and time
- a unified experience provides the convenience of staying connected across all your devices



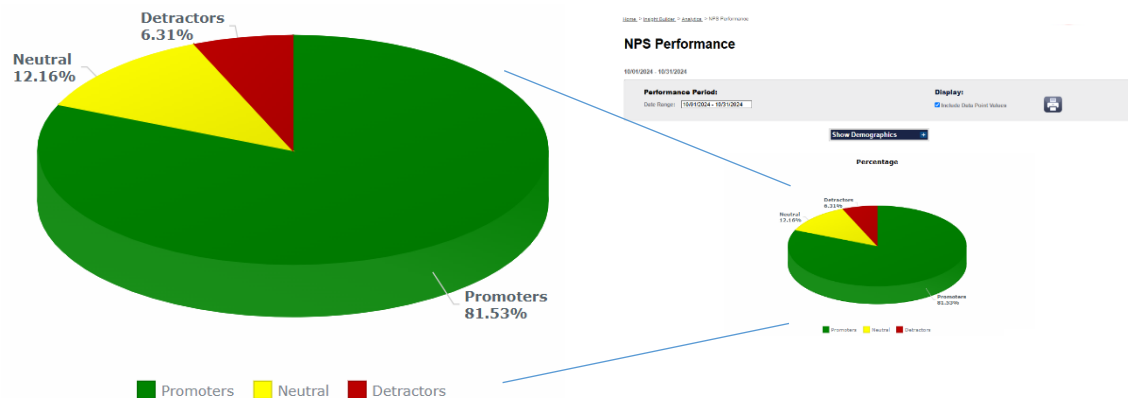
Simplified Footer (w/View Scale Showing Above)

- simplified layout for easier navigation
- handy view scale option provides quick reference resource
- ability to adjust viewing preferences with just a click makes it simpler to find what you need



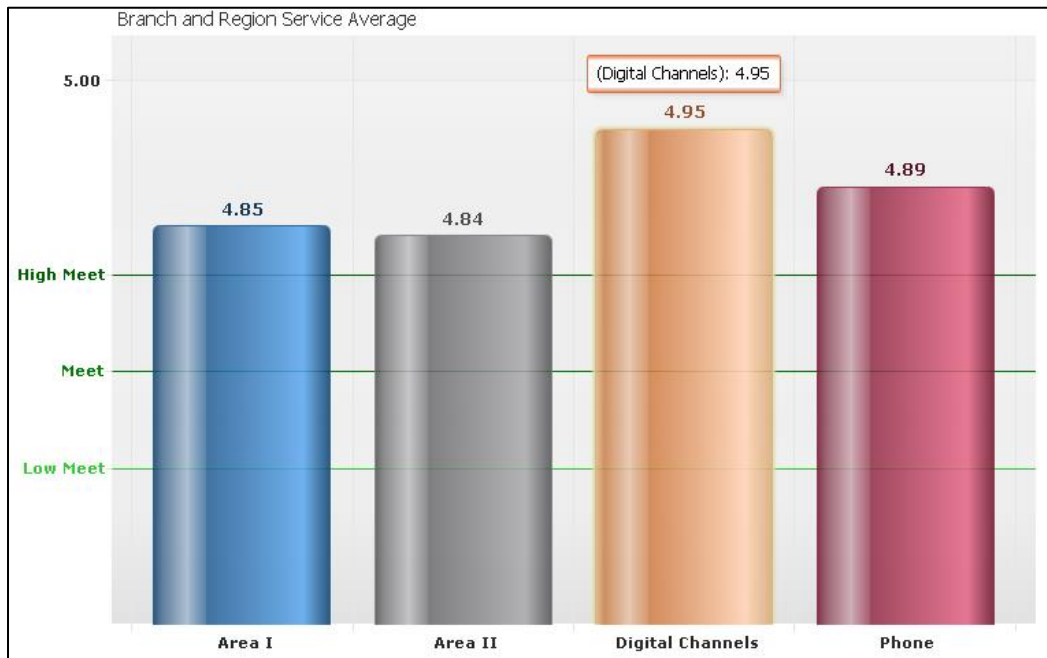
Updated Charts in Insight Builder

- fresh color palette and improved chart layouts offer a more visually appealing experience
- updated bar graphs, pie charts, and line graphs make data interpretation easier and more intuitive
- vibrant visuals enhance your analysis and insights



Updated Charts in Relationship Builder and Team Builder

- Updated chart design for enhanced visual appearance and user experience



Multi-Select Report Options

Users can now select more than one region and/or branch and/or survey type from the Insight Builder Dashboard and Net Referral by Category (aka NPS Driver Insights) and Experience Management Alert Summary (aka Alert Summary) reports

- select multiple regions and/or branches for a more tailored view of your data
- provides deeper insights into the NPS Driver Insights (formerly Net Referral by Category) report, making it easier to analyze trends and performance across various segments.
- offers greater flexibility and a more personalized experience as you navigate your data

Home > Insight Builder > Dashboard

Insight Builder Dashboard

Period: [1/1/2024 - 11/5/2024]

The screenshot displays the Insight Builder Dashboard interface. At the top, the breadcrumb path is 'Home > Insight Builder > Dashboard'. The main header shows 'Measure: NPS' and 'Period: [1/1/2024 - 11/5/2024]'. Below this, there are two donut charts: 'NPS' with a score of 72.78 and 'Relationship Driver'. A 'Survey Type' dropdown menu is open, listing various categories with checkboxes. The 'Relationship' and 'General Transactions' options are checked. A blue callout box points to the dropdown with the text 'Select Multiple Locations or Survey Types'. On the right side, there are filters for 'Region: All Regions' and 'Location: All Locations', along with a list of key performance indicators (KPIs) such as 'Leads In Progress: 0', 'Recorded Sales Total: \$10,000', and 'Close Rate: 0.99%'.

Renamed Insight Builder Reports

- “Net Referral” to become “Net Promoter Score (NPS)[®]”
 - new report and analytics titles provide enhanced clarity and usability
 - intuitive terminology helps you quickly locate and understand your data
 - designed to streamline your experience and make insights more accessible

Main (Menu) Report Name Changes

Former Name	New Name
CX Analytics	CX Performance Scorecard
Experience Management	Alert Management Hub
EMS Business Analytics	Alert Insight Dashboard
Promoters & Detractors Summary	NPS Performance
Promoters & Detractors by Category	NPS Segment Insights
Net Referral by Category	NPS Driver Insights
Branch Performance	Team Performance Analysis
Demographic Analytics	Segmentation Analysis
Share of Wallet	Outreach Opportunities
Insight Builder Surveys	Survey Hub
Interactive Trend Analysis	CX Performance Trends
Heat Map Trend Analysis	CX Performance Heat Maps
Peer Comparison	Peer Performance Comparison

The following report names will remain the same:

- Dashboard
- Comment Analysis

Sub-Report Name Changes

Other sub-reports will also be changed:

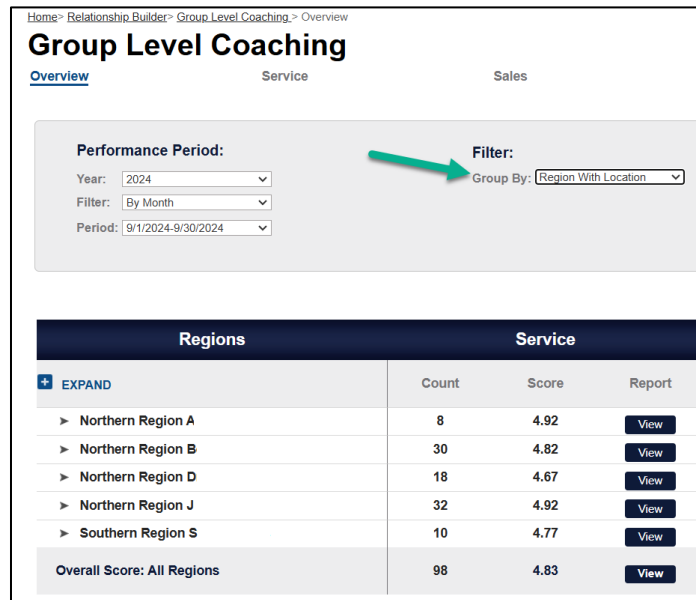
Former Name	New Name
Experience Alert Detail	Alert Detail
Experience Management Alert Summary	Alert Summary
Experience Management Alert Summary by (Department or Employee)	Alert Summary by (Department or Employee)

The following sub-report names will remain the same:

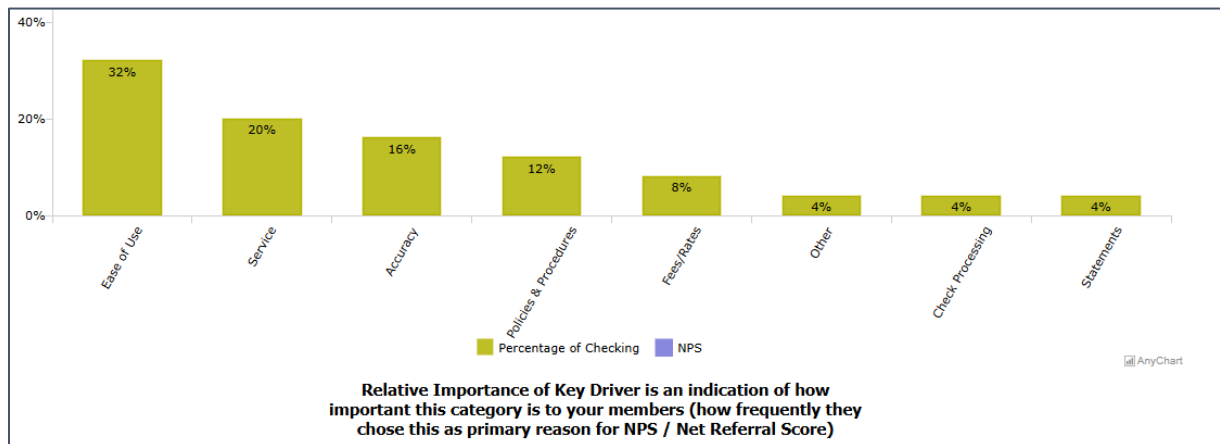
- Alert Close Analysis
- Product Requests
- Product Sales
- Product Close Rate
- Relationship Impact
- <Survey Type> Survey
- Sentiment Analysis
- Word Cloud
- Word Tree

Other Enhancements:

- Relationship Builder users now have the option to group by “Region With Location” or by “Region With Manager” within their Group Level Coaching reports



- Within the NPS Driver Insights analytics, percentages as to importance will now reflect the Key Driver instead of the overall whole



- When exporting to Excel from the Alert Hub, Relationship Impact data is exported when “Export alert comments” or “Export alert comments and survey details” is selected
 - Captures additional key data in your downloaded reports

Export Alert Data

How would you like to export your data?

Export alert summary

Export alert comments

Export alert comments and survey details

▲ Data exports with all applied filters

▲ File Format: .xlsx

Export Cancel

- Ability to filter on Supervisor within Survey Hub and CX Performance Heat Maps report gives you an additional option for sorting your feedback data

Home > Insight Builder > Survey Hub

Survey Hub

Performance Period:
Date Range: 11/01/2024 - 11/04/2024

Find Survey ID:

Filter:

Region: All Regions

Branch: All Branches

Supervisor: All Supervisors

Survey Type: All Survey Types

Category: All Categories

Display:
Score: NPS/Net Referral, Ease of Use

Save Clear

Export your information...

Release Date	Survey ID	Employee Name	Category	Date Of Visit	Branch	Supervisor	Survey Type	NPS/Net Referral	Ease of Use
11/01/2024	453705948		Service		Canfield		Relationship	10.00	5.00
11/01/2024	453705968		Service		Boardman		Relationship	10.00	5.00
11/02/2024	453706231		Service		Larchmont		Relationship	10.00	5.00
11/03/2024	453706350		Checking		Cortland		Relationship	10.00	5.00

- If the Spanish version of a survey was completed, an 'S' icon will appear next to the Survey ID within the Survey Hub:

11/26/2024	453712304	SunX (Online / Mobile)	11/4/2024	SunX	Digital
11/26/2024	453712307 S	SunX (Online / Mobile)		Cape Coral Santa Barbara	Relationship

- When viewing the survey or alert detail, surveys completed using the Spanish version will be clearly indicated:

[Home](#) > [Insight Builder](#) > [Survey Hub](#) > 453697711

Experience Survey Spanish

South Semoran

Survey Date: 10/1/2024	Date of Visit: 10/1/2024
Survey ID # 453697711	Record ID # 20233070000290881
Survey Sent: 10/1/2024	