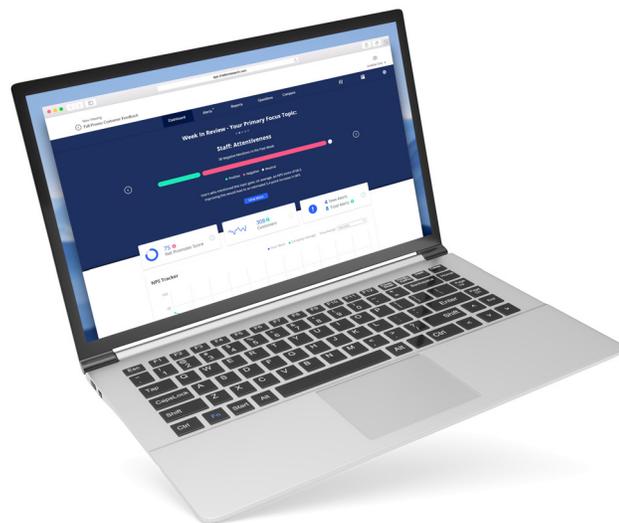


# Chatter Platform

## User Guide



September 2, 2021

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# 1

# Getting Started

The Chatter platform makes it easier than ever for brands to get closer to their customers. With Chatter, you are able to hear what your customers are saying about their experience in real time.

Using AI-driven text-messaging and/or online chats, conversations are had with your customers that make sharing feedback convenient for your customers, providing you with actionable insights to improve experiences quicker than ever before.

Chatter works best when customer-facing employees encourage every customer to take a moment to engage with the conversations.

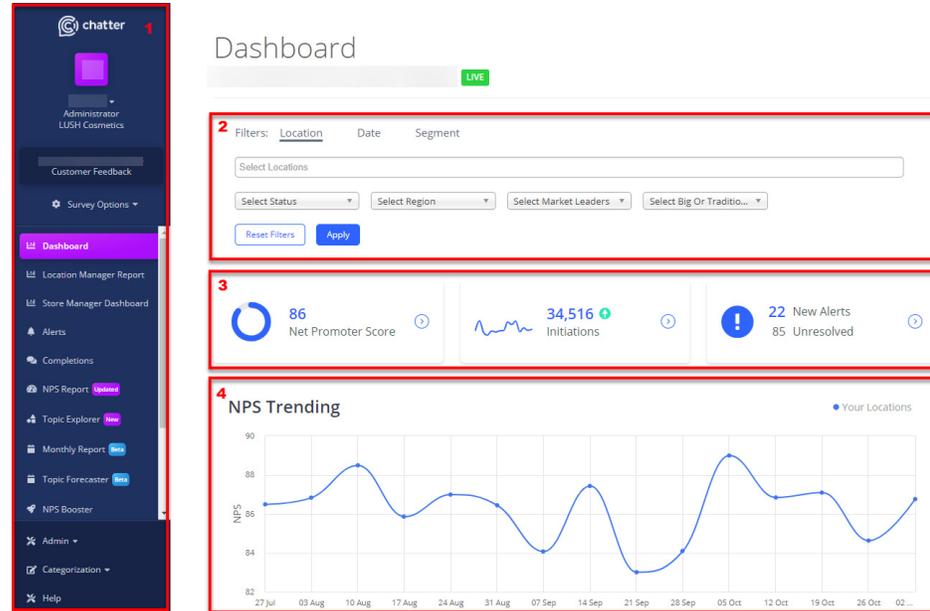
Starting the conversation is simple. In most cases, customers can trigger the conversation using one of three methods: (1) scan the QR code, (2) text the trigger word to the assigned phone number (for example, Text “Hello” to 20200), or (3) click a link in an email, on a website, or in a social media post.

# Chatter Dashboard Overview

*The Chatter Dashboard is the launch pad for gaining deeper insights into your business and your customers.*

**NOTE:** *Your dashboard may differ slightly depending on your company's custom presets and your user role.*

**Figure 1-1:** Chatter Dashboard



- 1) Navigation bar
- 2) Filters
- 3) Dashboard tiles
- 4) NPS Trending

The dashboard updates in real-time as feedback is collected from your customers through text message conversations and provides a quick overview of the health of your business. From here, you can find the information that matters most to you and then drill down for deeper insights.

The following sections break down the most important elements of the Chatter Dashboard.

## Navigation Bar

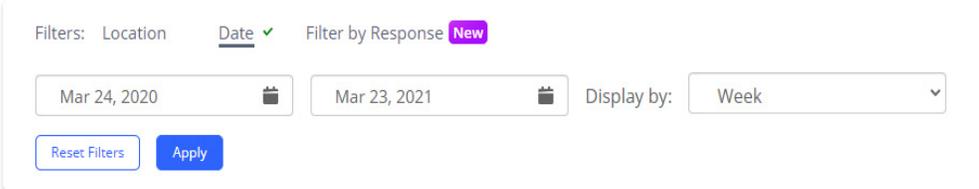
*The Chatter navigation bar is where you can access the dashboard, edit your profile, select the survey you want to view, and more.*

For a detailed list of the menu options, refer to “Navigation Bar Menu Options” on page 38.

## Filters

The Location, Date, and Filter by Response filters allow you to view the specific data you want to see.

**Figure 1-2:** Filters



The screenshot shows the filter interface with the following elements:

- Filters: Location, Date ✓, Filter by Response **New**
- Date range: Mar 24, 2020 (with calendar icon) to Mar 23, 2021 (with calendar icon)
- Display by: Week (dropdown menu)
- Buttons: Reset Filters, Apply

The most commonly used filter is the Date filter, which allows you to select a time frame and view responses for the selected period. The Filter by Response filter allows you to filter your dashboard by the answers to any particular questions in your conversations. For more information, refer to “Filtering the Dashboard” on page 12.

## Dashboard Tiles

The three Dashboard tiles provide a quick overview of the health of your business. To dive deeper into the data, click .

**Figure 1-3:** Dashboard tiles

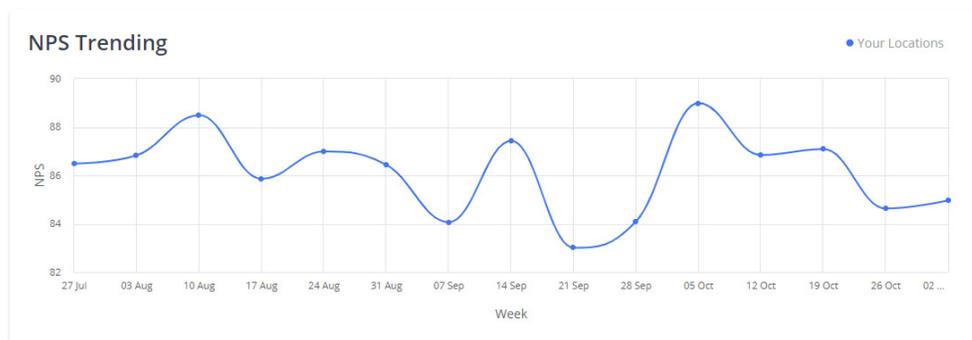


Tile	Description
Net Promoter Score	Displays your Net Promoter Score (NPS) or Customer Satisfaction score.
Engagement	Displays how many people initiated your conversational survey in a given time period.
Alerts	Displays the number of new and open customer alerts (either negative experience or customer requested contact).

## NPS Trending

Plots the NPS for the specified period and filter criteria. If no filter is set, then it displays the overall trending line.

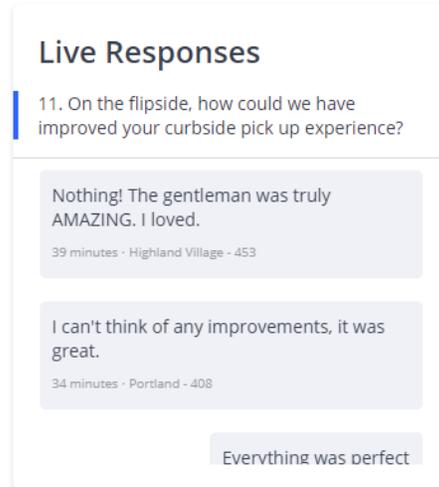
**Figure 1-4:** NPS Trending



## Live Responses

Displays the most recent and relevant feedback to a particular question selected by your organization. To review an entire conversation, click on a dialog bubble.

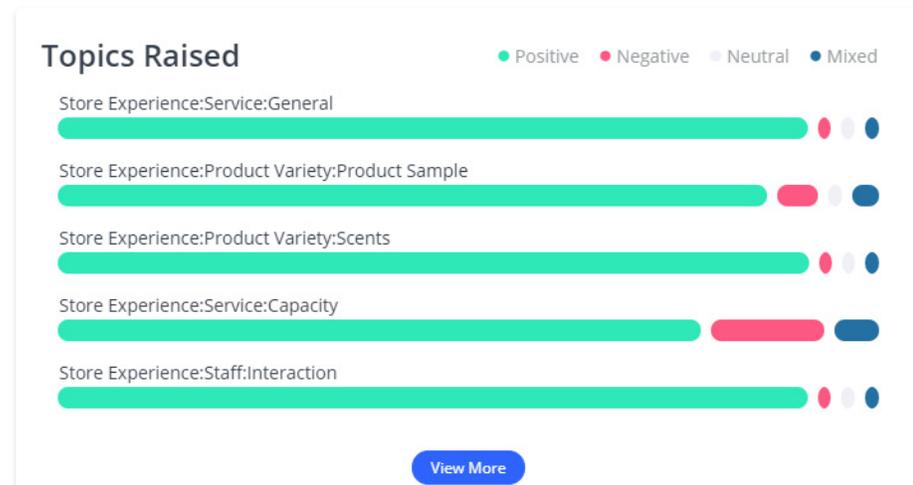
**Figure 1-5:** Live Responses



## Topics Raised

Displays the top five (5) topics being raised by your customers and indicates whether they were mixed, positive, negative, or neutral in sentiment. Click **View More** to see the full list of topics being raised on the Topics Explorer page.

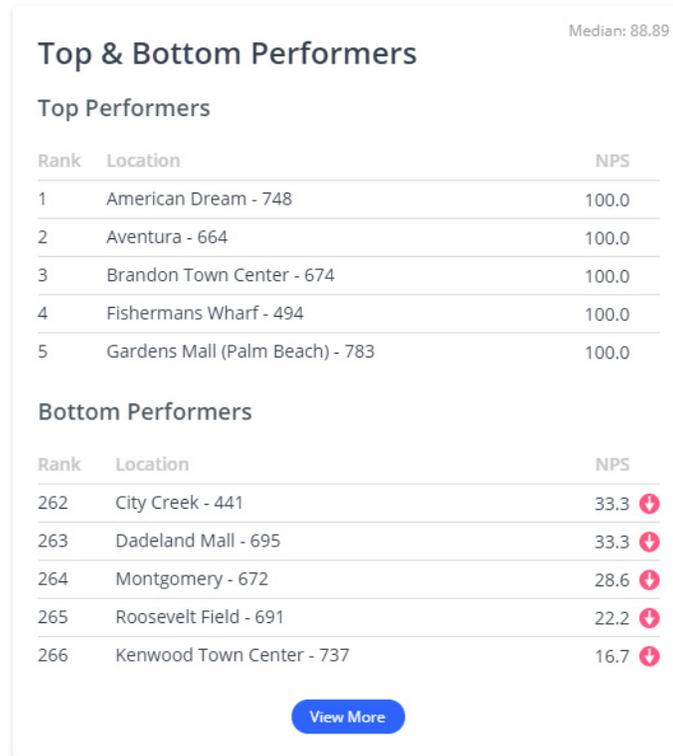
**Figure 1-6:** Topics Raised



## Top & Bottom Performers

Displays your highest and lowest performing locations. Click **View More** to see a more detailed list on the Benchmarks page.

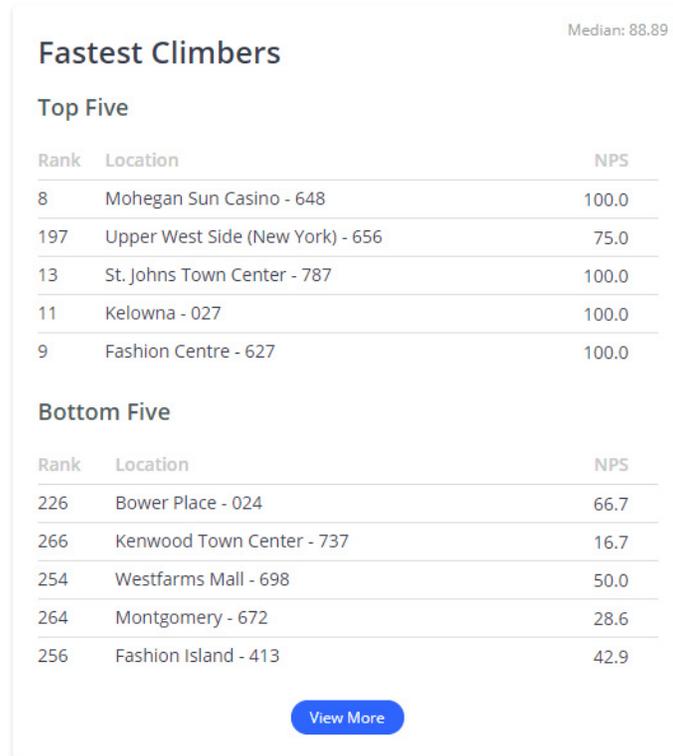
**Figure 1-7:** Top & Bottom Performers



## Fastest Climbers

Displays the top and bottom five locations that are currently trending. Click **View More** to see a more detailed list on the Benchmarks page

**Figure 1-8:** Fastest Climbers



## Response Summary

Every question in your conversation is displayed in its own tile. The graphs that are displayed within the application vary depending on the question type. The sample size of a particular question is also shown at the bottom right of each tile so that you know how many of your customers are represented in the graph.

*NOTE: The difference in sample sizes in the following examples are due to different survey paths/drop offs.*

**Figure 1-9:** Response tile



To change how the tile displays the data, click **Menu** and select **Graph** or **Log**.

**Figure 1-10:** Tile menu



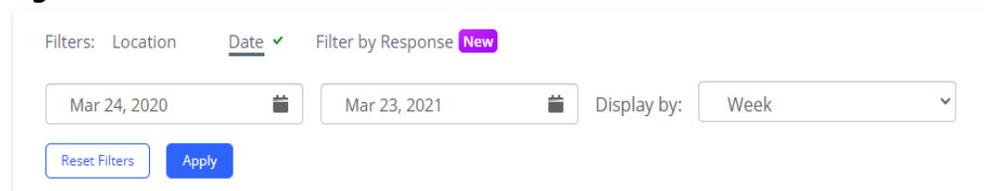
**Table 1-1:** Response tile menu options

Tile Menu Options	Description
Graph	<p>The Graph view is the quickest way to get a sense of how your customers are feeling. It displays either the top 5 topics or a list of latest responses. Depending on the Question Type, as defined in the survey editor, the graph type defaults to one of the following types:</p> <ul style="list-style-type: none"> <li>• Horizontal stacked-bar: Displays for [Yes/No] and scaled (ie. 1 to 5 rating) questions.</li> <li>• Pie chart: Displays for multiple choice questions.</li> <li>• Bar chart: Displays the top five topics broken down into the proportion of positive, negative, and neutral sentiment.</li> <li>• NPS meter: Display for NPS questions.</li> </ul>
Log	<p>The Logs view shows a granular view of your responses. It displays the date and time of response, store location, and a link to the conversation.</p>

## Filtering the Dashboard

*Dashboard filters allow conversations to be observed using different combinations of filters/restrictions in a single dashboard. Chatter provides the option to filter by location, data range, or by response.*

**Figure 1-11:** Dashboard filters



**NOTE:** *Your filters may differ due to your company's custom presets and your user permissions.*

Filter	Description
Location	Location allows you to filter results by location and metadata (ie. status, region, market leaders, and store type). You can include multiple locations and observe the trending behaviors for each. The Location filter options are: <ul style="list-style-type: none"> <li>• <b>Location:</b> Filter by one or more locations.</li> <li>• <b>Status:</b> Filter by a location status.</li> <li>• <b>Region:</b> Filter by region.</li> <li>• <b>Market Leaders:</b> Filter by market leader.</li> <li>• <b>Select Big or Traditional:</b> Filter by location type.</li> </ul>
Date	Date allows you to filter dashboard results by a data range.
Filter by Response	Segment allows you to filter the dashboard results by the answers to any question in your conversational survey.

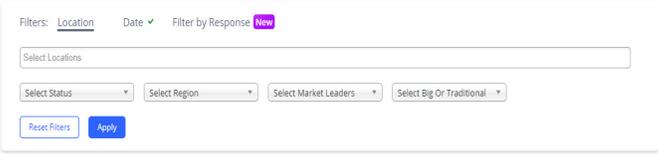
*NOTE: The applied filter settings are stored in the application URL. As a result, you can share your filtered page by sharing the browser URL.*

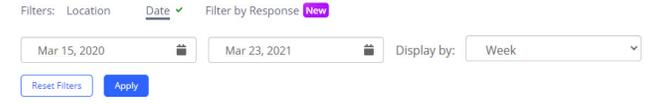
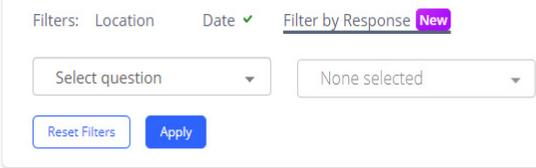
## Adding a Dashboard Filter

*The following steps detail how to add a dashboard filter.*

### TASK

- To create a dashboard filter, select a filter that contains the type of information you want:
  - **Location**
  - **Date**
  - **Filter by Response**
- Define how the filter returns the data:

Filter	Definition
Location	 <p>Select a location and metadata to filter.</p>

Filter	Definition
Date	 <p>Select a start and end date. Then, from the Display by menu, select <b>Day</b>, <b>Week</b>, or <b>Month</b>.</p>
Filter by Response	 <p>Select a question and answer from the drop-down menus. If you select the NPS question, then select 0 through 6 from the answer drop-down menu</p>

3. Click **Apply**.

*STEP RESULT:* The dashboard contents updates according to your filter settings. The filtered view is preserved across all pages of the Chatter Dashboard.

4. To clear the filter settings, click **Reset Filters**.

## Best Practices

The following are best practices on how to use the Chatter Dashboard:

- 1) Take an initial scroll down the whole dashboard to view the health of your NPS and to get a general summary of all of the questions asked in your survey. By working your way down the page, you should have a good sense of how your customers are feeling, question by question.
- 2) On second pass of the dashboard, pay attention to key items or results that stand out as interesting, unique, or unexpected and then drill down into those questions for details and insights.
- 3) Utilize the filter feature to provide different combinations of data from the dashboard.

For more information on how to make best use of the Chatter Dashboard, refer to “Accessing Key Benefits in the Chatter Platform” on page 15.

# 2

## Accessing Key Benefits in the Chatter Platform

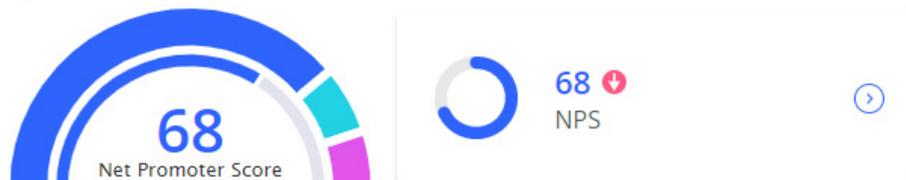
The following sections describe common usage of Chatter to extract maximum benefits from the platform.

*NOTE: This section avoids attempting to fully itemize usage scenarios. Instead, it lists how to obtain key benefits.*

### The NPS Report: Looking Beyond the Number

*Your Net Promoter Score (NPS) is the percentage of your customers who are promoters minus the percentage who are detractors.*

**Figure 2-1:** Net Promoter Score



NPS is a quick indicator of the health of your business by showing how likely someone is to recommend your product/services to friends or family. From the Chatter Dashboard, you can gain deeper insights into how your customer's likelihood to spend and recommend has been trending by location, region, or even district manager. This information can easily be filtered for a specific time frame and segmented by locations.

## Understanding Your Customer's Experience

To understand your customer's experience, you can quickly scan the Dashboard tiles (NPS, Initiations, and New Alerts) and then drill down for deeper insights.

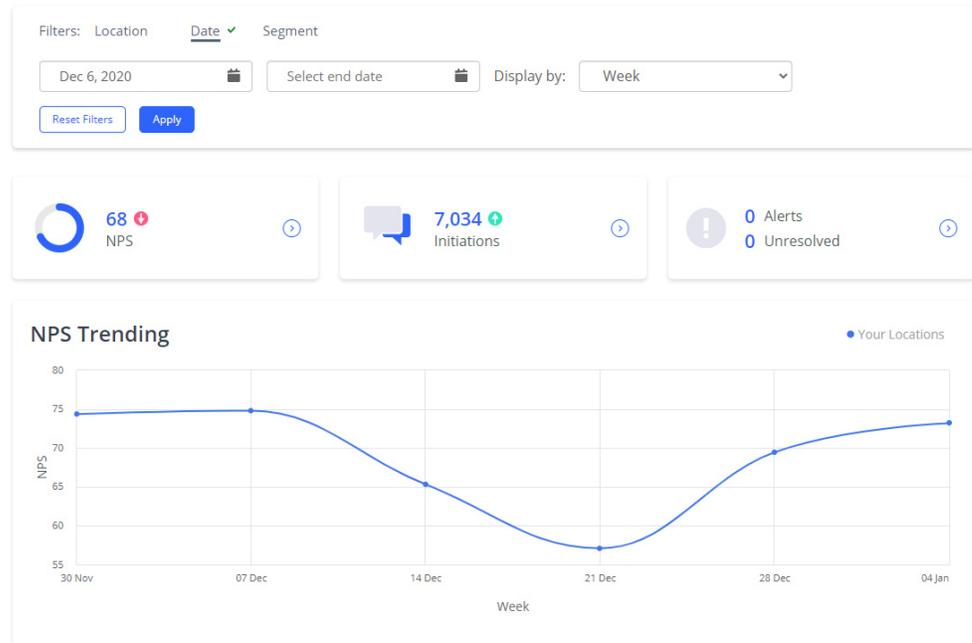
To review how your customer's likelihood to spend and recommend has been trending by location, region, or even district manager (you decide how to segment your locations), perform the following steps:

### TASK

1. Select the date range you wish to review.
  - a From the Filters section of the Dashboard page, click **Date**.
  - b Select a start and end date for the date range.
  - c From the Display by menu, select an interval for the NPS Trending graph: **Day**, **Week** (default value), or **Month**.
  - d Click **Apply**.

*STEP RESULT:* The Dashboard displays information for all locations within the specified date range.

**Figure 2-2:** Dashboard

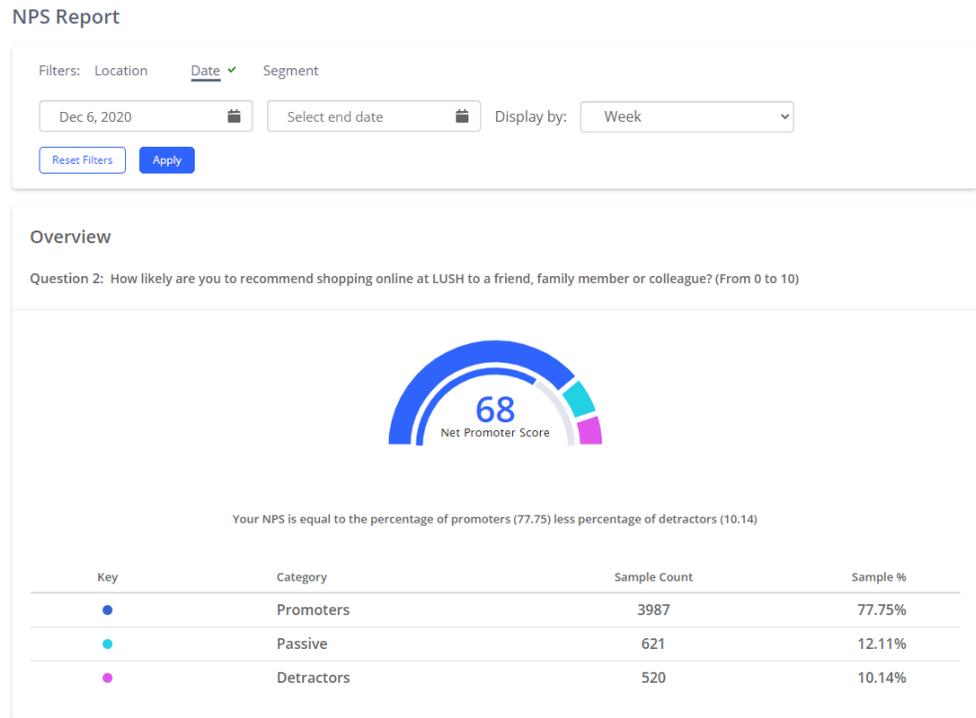


2. For more detailed information on your NPS, from the NPS tile, click  to open the NPS Report page.

RESULT:

The NPS Report page opens in a new browser tab. The NPS Report page allows you to review how NPS differs by customer response and to drill down for more information.

**Figure 2-3:** NPS Report page



**Table 2-1:** NPS Report page sections

Section	Description
Overview	Displays the distribution of percentages among promoters, passives, and detractors. Your NPS is the percentage of promoters minus percentage of detractors.
By Response	Displays the distribution of responses by Detractors, Passives, Promoters, and Other Responses.
Top 10 Other Responses	Displays the top 10 answers for Other Responses.
Segmentation Analysis	Displays segments of customers by a selected question. To segment responses, select a question from the Segmentation Analysis drop-down menu. For more information, refer to “Analyzing Your Key KPIs” on page 18.
NPS Trending	Displays how NPS was trending in the last 6 periods. You can filter the results by any attribute associated with your locations (ie. region, market leader, location, etc.) and by time period (ie. Day, Week, or Month).

## Analyzing Your Key KPIs

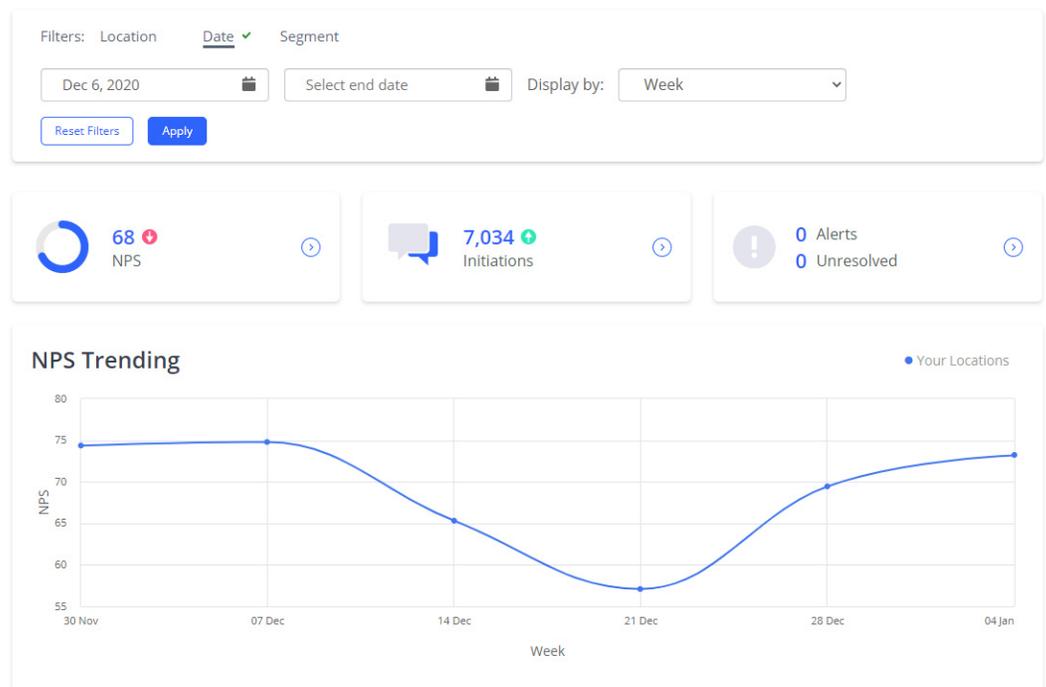
To analyze how your key KPIs drive your customers to spend more and recommend your brand, you can quickly scan the dashboard tiles (NPS, Initiations, and New Alerts) and then drill down for deeper insights.

The following steps detail how to review NPS responses through the use of segmentation analysis.

### TASK

1. Select the date range you wish to review.
  - a From the Filters section of the Dashboard page, click **Date**.
  - b Select a start and end date for date range.
  - c From the Display by menu, select the an interval for the NPS Trending graph: **Day**, **Week** (default value), or **Month**.
  - d Click **Apply**.

*STEP RESULT:* The Dashboard displays information for all locations within the specified date range.



2. From the NPS tile, click .
 

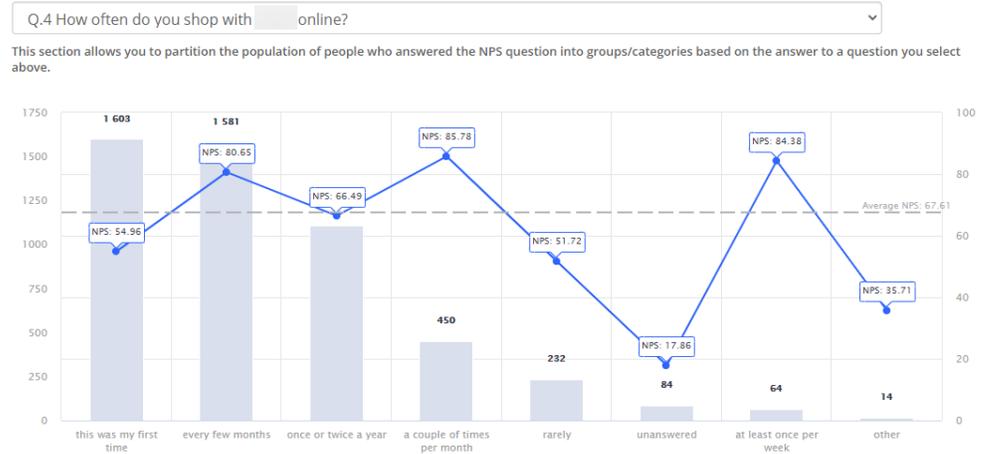
*STEP RESULT:* The NPS Report page opens in a new browser tab.
3. Scroll down to the Segmentation Analysis section and select a question you wish to use to segment the NPS score into response groups.
 

*STEP RESULT:* The responses display in a graph and chart form so that you can easily identify potential red flags in your NPS score. For example, in the

following figure, by segmenting by purchase frequency we can see the relation between NPS and customer loyalty.

**Figure 2-4:** Segment by purchase frequency

Segmentation Analysis



- To dig deeper into the potential cause of large NPS discrepancies for a question (topic), from Chatter sidebar, click **Topic Explorer**.

*STEP RESULT:* The Topics Explorer page displays.

- From the Filters section of the Topics Explorer page, click **Segment**.
- From the Segment drop-down menus, select that same question (topic) from Step 4 and the response with the low NPS, and then click **Apply**.

*STEP RESULT:* The Topics Explorer provides detailed information on the selected topic. For more information, refer to “Understanding Topic Names” on page 21.

## Identifying the Distribution of Your Customers

*Net Promoter Score (NPS) is calculated by subtracting the percentage of Detractors from the percentage of Promoters. As a result, it is not enough to only know your NPS, but instead to identify the distribution of your customers that are brand enthusiasts (promoters), indifferent (passives), or that actively denigrate your brand (detractors).*

The Chatter Dashboard allows you to analyze the NPS score distribution and the relative frequency of Promoters, Passives, and Detractors

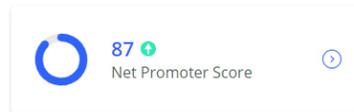
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### TASK

1. Select the date range you wish to review.
  - a From the Filters section of the Dashboard page, click **Date**.
  - b Select a start and end date for date range.
  - c From the Display by menu, select the interval for the NPS Trending graph: **Day**, **Week** (default value), or **Month**.
  - d Click **Apply**.

*STEP RESULT:* The Dashboard displays information for all locations within the specified date range. The NPS tile displays the average NPS rating for the selected time period.

**Figure 2-5:** NPS tile



2. From the NPS tile, click .
  - STEP RESULT:* The NPS Report page opens in a new browser tab.
  3. From the Filters section of the NPS Report page, select **Segment**.  
*STEP RESULT:* The Segment filter appears.
  4. From the drop-down menu, select the key NPS question and the detractor responses (0 through 6), and then click **Apply**.  
*STEP RESULT:* The NPS Report page updates to reflect the Detractors metrics.
  5. Scroll down to the By Response section to gain deeper insights on the detractors rating count and sample percentage.
-

# Your Customers Are Talking, Are You Listening?

*The Chatter platform uses machine learning models to apply topics to the conversations your customers are having with you. By analyzing the occurrences of these topics, you can get deeper insights and analytics on the big picture.*

## Understanding Topic Names

Topics names are displayed in the Topics Explorer page in three hierarchical levels, with an optional fourth name representing an extra level of situational detail:

[Level 1]:[Level 2]: [Level 3]([Level 4])

The following examples demonstrate the hierarchical nature of the Chatter topic names:

- **Example 1:** When describing the condition of your fitting rooms, the relevant topic name would be *Store Experience:Location:Facilities (Fitting Rooms)*.
- **Example 2:** A conversation describing the odor in a location would surface the *Store Experience:Location:Scents* topics.

To analyze the topics names, do the following:

---

### TASK

1. Select the date range you wish to review.
  - a From the Filters section of the Dashboard page, click **Date**.
  - b Select a start and end date for date range.
  - c From the Display by menu, select the an interval for the NPS Trending graph: **Day**, **Week** (default value), or **Month**.
  - d Click **Apply**.

*STEP RESULT:* The Dashboard displays information for all locations within the specified date range.

2. From the navigation bar, select **Topic Explorer**.

*STEP RESULT:* The Topics Explorer page appears and displays topics from the specified date range.

3. From the Topic Name Selector section, select the level of granularity to you wish to analyze topic names.

*ADDITIONAL INFORMATION:* Being too detailed may dilute results and analysis. As a result, you must decide how specific you want the topics names to be. For example, if *Store Experience:Location:Facilities (Fitting Rooms)* is too detailed,

then you may need to just look at the first two levels of topic names (ie. *Store Experience:Location*). In that case, from Topic Name Selector, select **Level 2**.

*STEP RESULT:* The Topics Explorer page updates with the new analytics aggregated to the specified topic level. Topics with high negative mentions are highlighted and displayed graphically in the Topics with Increasing Negative Mentions section. The All Mentions section displays all topics in table form.

4. From the All Mentions section, select **Only Negative**.

*STEP RESULT:* The table displays topics with highest to lowest negative mentions.

5. Click on the topic name to gain more insight into the topic.

*STEP RESULT:* The Topics Raised by Customers page opens in a new web browser tab. It displays deeper insights for the selected topic such as customer responses, store location, date, and more. You can click on a question to view the whole conversation.

6. To flag a specific question/topic to be re-evaluated by the Chatter QC team, click .

*STEP RESULT:* A dialog appears confirming the topic to be flagged. Click **OK** to continue. Note that this action cannot be undone.

## Understanding What Your Customers Are Saying at Scale

*Understanding how the topics are being raised by all your customers across all your conversational channels is challenging. Specifically, it is very important to be aware of topics that are trending in the wrong direction.*

The Topics Explorer page allows you to analyze the trending and frequency of conversational topics that are negatively impacting brand perception.

---

### TASK

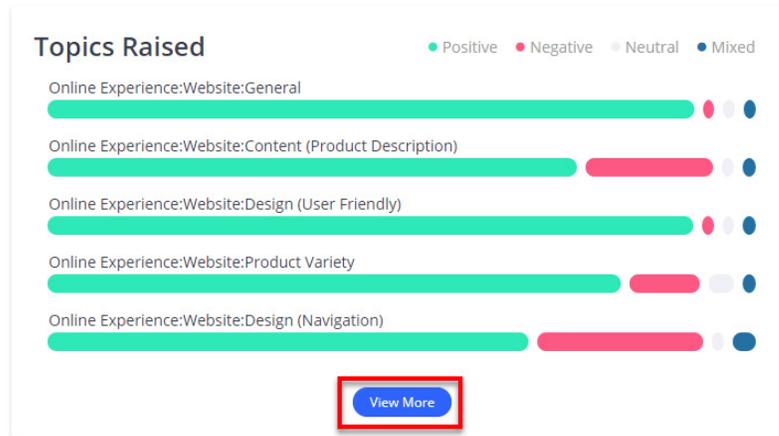
1. Select the date range you wish to review.
  - a From the Filters section of the Dashboard page, click **Date**.
  - b Select a start and end date for date range.
  - c From the Display by menu, select the an interval for the NPS Trending graph: **Day**, **Week** (default value), or **Month**.
  - d Click **Apply**.

*STEP RESULT:* The Dashboard displays information for all locations within the specified date range.

2. From the navigation bar, select **Topic Explorer**.

*ADDITIONAL INFORMATION:* Alternately, from the Topics Raised section of the Dashboard page, click **View More**.

**Figure 2-6:** Opening Topics Explorer page from Topics Raised section



*STEP RESULT:* The Topics Explorer page loads and displays topics from the specified date range.

RESULT:

From the Topics Explorer page, you can quickly view a summary of topics that have increasing negative mentions, as well as review all topics being raised by your customers.

## Boosting your NPS

*Understanding what your customers are saying at scale is a critical first step in leveraging insights gathered from conversations with your customers. However, determining how and where to act requires you to quantify and prioritize which insights are most likely to boost customer satisfaction.*

The NPS Booster allows you to focus on the topics that are having a significant impact on customer satisfaction. It uses a proprietary methodology to assign a satisfaction and impact score to topics. It presents a summary of those topics that are significantly positive or have negative impact represented as *Strengths* and *Weaknesses*, respectively.

TASK

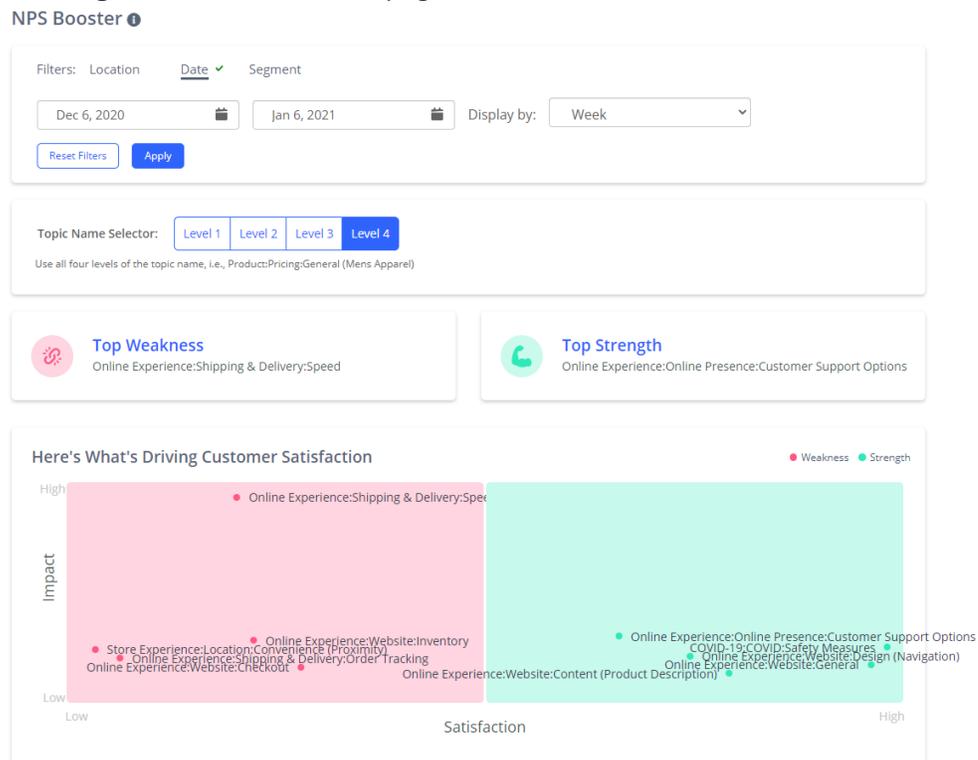
1. Select the date range you wish to review.
  - a From the Filters section of the Dashboard page, click **Date**.
  - b Select a start and end date for date range.
  - c From the Display by menu, select the an interval for the NPS Trending graph: **Day**, **Week** (default value), or **Month**.
  - d Click **Apply**.

*STEP RESULT:* The Dashboard displays information for all locations within the specified date range.

2. From the navigation bar, select **NPS Booster**.

*STEP RESULT:* The NPS Booster page loads and displays information regarding your top strength and weaknesses from the specified date range.

**Figure 2-7:** NPS Booster page



3. Review the Here's What's Driving Customer Satisfaction section.
 

*ADDITIONAL INFORMATION:* This section displays your top 5 strengths and weaknesses graphically. Satisfaction and Impact are shown in the x and y axes, respectively. It is important to take special notice of topics in the upper left

section of the graph as they depict topics with low satisfaction and high impact.

**Figure 2-8:** Here's What's Driving Customer Satisfaction section

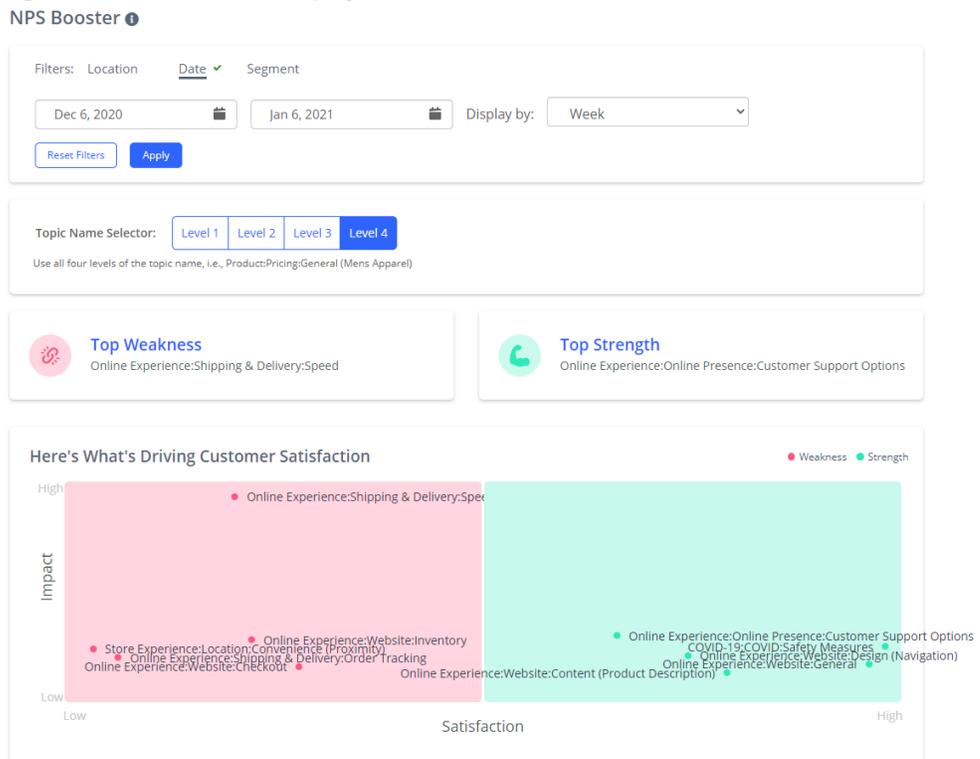


4. For a more info on your strengths and weaknesses (such as NPS impact, number affected, and more), scroll down to the Detailed View section.

RESULT:

The NPS Booster page loads and displays information regarding your top strength and weaknesses from the specified date range.

**Figure 2-9:** NPS Booster page



With the information provided on the NPS Booster page, you can:

- Review the impact of topics surfaced from your conversations with your customers on their likelihood to spend more and recommend your brand.
- Probe the underlying reason behind your NPS.
- Improve your organization by taking actions to boost the satisfaction levels of specific topics, knowing that these actions will boost your overall NPS.

The following table details each section of the NPS Booster page.

Section	Description
Topic Name Selector	<p>Select the topic name level (ie. Level 1, Level 2, Level 3, or Level 4). The NPS Booster page updates to reflect the selection.</p> 
Top Weakness/Top Strength	<p>Displays the top weakness and strength for the selected topic name.</p> 
Here's What's Driving Customer Satisfaction	<p>Displays the impact customer satisfaction has on your NPS. The graphic groups topic names into the top 5 strengths and weaknesses.</p>  <p>Satisfaction and Impact are shown in the x and y axes, respectively. It is important to take special notice of topics in the upper left section of the graph as they depict topics with low satisfaction and high impact.</p>
Top 10 Weaknesses/Strengths	<p>Displays top 10 weaknesses/strengths along with their impact on your NPS. This information can helpful in determining the next steps taken to improve customer satisfaction.</p>
Detailed View	<p>Displays a detailed view of your brand's strengths and weaknesses. This includes:</p> <ul style="list-style-type: none"> <li>• NPS Impact</li> <li>• Topic Satisfaction</li> <li>• Number Affected</li> </ul>

# Are Your Customers Engaging with You?

*Great insight comes from having great data. When you give your customers an opportunity to have a dialogue with you, it is imperative that this opportunity to learn is maximized.*

The Chatter platform tracks the number of times someone has started a conversation with you (known as an *initiation*) and the number of times they have completed a conversation (known as a *completion*). The rate at which people initiate a conversation is a key metric for understanding the effectiveness of your techniques to entice your customers to engage you in conversation. The rate at which your customers complete surveys is a key metric for understanding the effectiveness of the conversation.

## Observing Your Customer's Engagement

Observing the number of times your customers have completed a conversation (also known as *Completions*) allows you to discover how your customers are engaging with your conversations and how the conversational engagement is trending over time.

---

### TASK

1. Select the date range you wish to review.
  - a From the Filters section of the Dashboard page, click **Date**.
  - b Select a start and end date for date range.
  - c From the Display by menu, select the an interval for the NPS Trending graph: **Day**, **Week** (default value), or **Month**.
  - d Click **Apply**.

*STEP RESULT:* The Dashboard displays information for all locations within the specified date range. The Initiations tile displays the number of initiations for the selected filter.

**Figure 2-10:** Initiations tile



2. From the Initiations tile, click .
-

RESULT:

The Initiations/Completions Report opens in a new web browser tab.

**Figure 2-11:** Initiations/Completions Report page



From the report you can review how initiations, completions, and the completion rate have trended over time.

- **Engagement Graph:** Graphically displays the customer initiations and completions over the specified date range.
- **Engagement Table:** Displays the initiations, completions, and completion rate for the specified date range.

# Staying on Top of Customer Experience

*In the customer experience domain, real-time alerts are critical for resolving incidents in a timely manner to allow for maximum client satisfaction. It is important to stay on top of the customer experience incidents and the conversational KPIs that matter most to you.*

The Chatter platform makes it easy to monitor critical incidents by using:

- **Alert Generation:** Generates alerts for an unlimited number of conversational circumstances.
- **Alert Propagation and Notification:** Ensures that the right people receive alert notifications.
- **Alert Management and Resolution:** Tracks alert status and how your staff responds to them.

## Tracking Your Alerts

*The Chatter platform's alert management and resolution capabilities are the means through which your organization can stay on top of customer experience incidents in a timely and organized manner.*

The following steps explain how to properly manage your alerts.

---

### TASK

1. Select the date range you wish to review.
  - a From the Filters section of the Dashboard page, click **Date**.
  - b Select a start and end date for date range.
  - c Click **Apply**.

*STEP RESULT:* The Dashboard displays information for all locations within the specified date range. The Alerts tile displays the number of new and unre-

solved customer alerts (either negative experience or customer requested contact).

**Figure 2-12:** Alerts tile

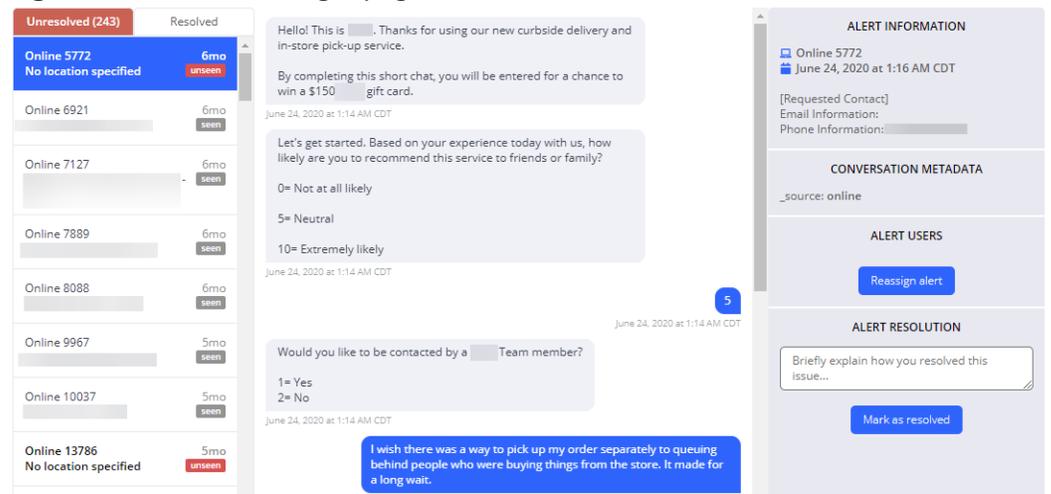


2. From the Alerts tile, click .

RESULT:

The Alert Manager page loads in a new web browser and displays message from customers that requested contact.

**Figure 2-13:** Alert Manager page



From this page you can take the following actions:

- View the list of resolved and unresolved alerts according to the specified filter criteria.
- View entire conversations and the specific alerts details.
- View contact and metadata information.
- From the Alert Users section, reassign the alert to another user.
- From the Alert Resolution section you can mark alerts as resolved once you have taken action to deal with the situation and add a message to the alert that details the steps taken to resolve the issue.

# Understanding Regional Differences in Satisfaction and Engagement

*Regional differences in satisfaction and survey engagement are commonplace. The Chatter platform allows you to optimize how you invest by summarizing and surfacing these regional differences.*

## Understanding Key Customer Experience Trends

*Whether you are part of the c-suite or an on-the-go regional manager, being able to rapidly get a summary of the monthly performance of regions and locations is fundamental to leveraging customer experience (CX) trends into deeper customer engagement.*

To use the Monthly Report feature to better understand key CX trends for your entire organization, do the following:

---

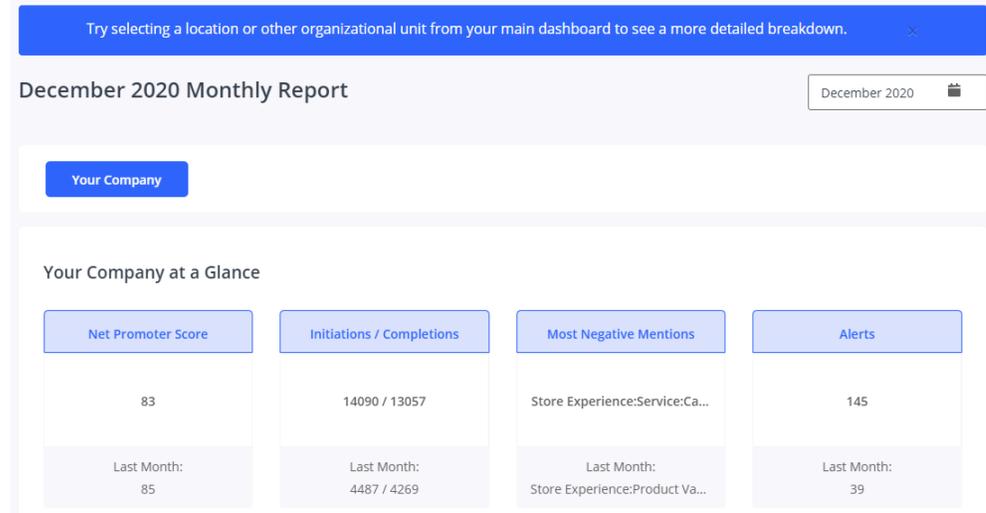
### TASK

1. From the Dashboard, select the location and date filters and then click **Apply**.  
*STEP RESULT:* The Dashboard displays information for the specified locations and date range.
  2. From the Chatter navigation bar, select **Monthly Report**.
-

RESULT:

The Monthly Report displays automatically forcing the date filters specified to the appropriate month.

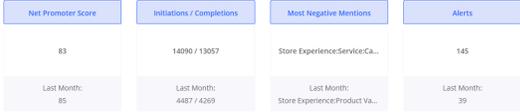
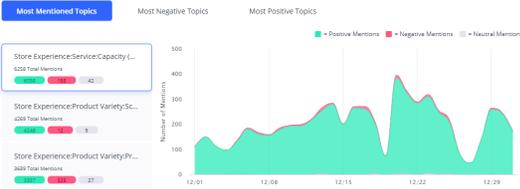
**Figure 2-14:** Monthly Report page



From the Monthly Report, you may review the following:

- Month over month changes in satisfaction, initiations, completions, and alerts.
- The topic of conversation that had the most negative mentions (this month and last).
- Trending analysis of satisfaction, initiations, completions, and alerts.
- Impact analysis for topics surface from your conversations with your customers on their likelihood to spend more and recommend your brand.
- Probing analysis on the underlying reasons behind your NPS score.
- Detailed trending analysis on the topics that surface most frequently.
- A complete breakdown of performance across regions and locations.

**Table 2-2:** Monthly Report page sections

Sections	Description
<p>Your Company at a Glance</p>	<p>Displays a snapshot of your NPS, Initiations/Completions, Most Negative Mentions, and Alerts.</p> <p>Your Company at a Glance</p> 
<p>View the Trends</p>	<p>Displays trends for NPS, completions, and alerts.</p> <p>View the Trends</p> 
<p>Top 5 Strengths</p>	<p>Displays the top 5 topics that are positively impacting your NPS. The results are based on the NPS Booster algorithm.</p>
<p>Top 5 Weaknesses</p>	<p>Displays the top 5 topics that are negatively impacting your NPS. The results are based on the NPS Booster algorithm.</p>
<p>What Your Customers Are Saying</p>	<p>Displays the 3 most mentioned, negative, and positive topics from customer conversations.</p> <p>What Your Customers Are Saying</p> 
<p>How Your Stores Are Doing</p>	<p>Displays a complete breakdown of performance across regions and locations.</p>

## Analyzing Satisfaction Across Regions and Locations

Using the Benchmark feature, you can select how to segment your locations.

### TASK

1. From the Dashboard, select the location and date filters and then click **Apply**.

*STEP RESULT:* The Dashboard displays information for the specified locations and date range.

2. Scroll down to review the Top & Bottom Performers and Fastest Climbers dashboard tiles. From here, you can observe your top and bottom locations and the highest trending location for NPS.

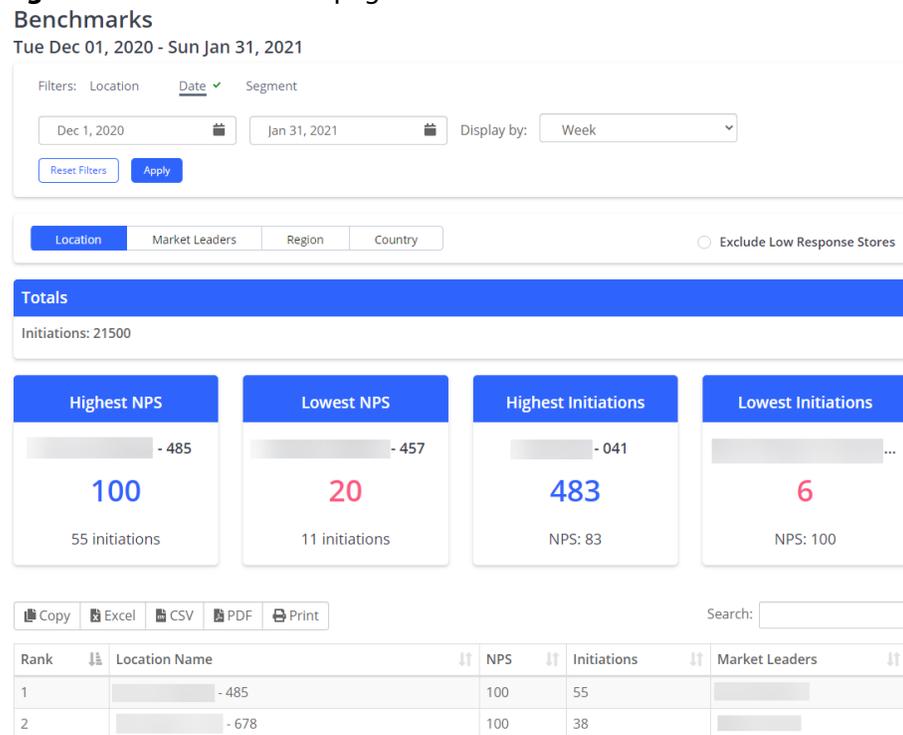
3. From the Chatter navigation bar, click **Benchmarks** to gain more insight into your customer satisfaction for these locations.

*ADDITIONAL INFORMATION:* Alternately, you can click **View More** from either the Top & Bottom Performers and Fastest Climbers tiles.

### RESULT:

The Benchmarks page displays the highest NPS and initiations.

**Figure 2-15:** Benchmarks page



From here, you can segment the results by location, market leaders, region, or country.

# Getting the Most Out of Your Data

While APIs provide flexibility, their complexity makes it challenging to implement. To mitigate this, you can use the Data Export feature for a single (or repeating) flat file exports (\*.csv). This allows you to:

- Export reply, conversation, and topic-level data within a specified data range.
- Filter data based on point-of-contact (POC) metadata (such as store name, region/district roll-up, geographical location, and more).
- Segment the exported data based on answers to specific questions (for example, non-purchasers, first-time shoppers, a specific demographic group, and so on) which can then be combined for complex segmentation.
- Schedule the export to run once, daily, weekly, or monthly, and be notified by email when your export is ready for download.

---

## TASK

1. From the Dashboard navigation bar, select **Data Exports**.  
*STEP RESULT:* The Data Exports page displays. From this page you can view previous data exports (if any) and download the CSV files.
2. To create a new data export, click **Create new data export**.  
*STEP RESULT:* The Create New Data Export page displays.
3. From the Create New Data Export page, you can define the following entries for the data export:
  - **Basic Setting:** You must enter a name for the export file, set the data export type (Replies, Conversations, or Topics), select where to schedule a repeating export, and set the date range.
  - **POC Filtering:** Select point of contact/location values to filter for (or leave empty to export all values).
  - **Question Filtering:** Select question values to filter for (or leave empty to export all values).

4. To generate the new data report, click **Prepare data export**.

*STEP RESULT:* When complete, a data export notification is sent to the mail you registered with Chatter (depending on the amount of data, it may take a few minutes to generate). The export can also be downloaded, re-run, or cloned from the Data Exports page.

RESULT:

With the exported data file, you can import the data into your BI tooling or data lake, perform ad hoc analysis of the data in any tool that reads CSVs, or create visualizations of data that are not currently available on the Chatter platform.

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# A

# Miscellaneous Operational Tasks

## Finding a Conversation

*If you are provided a date and snippet of text, you can search your responses to locate the full conversation.*

---

### TASK

1. Select the date range you wish to review.
  - a From the Filters section of the Dashboard page, click **Date**.
  - b Select a start and end date for date range.
  - c From the Display by menu, select the an interval for the NPS Trending graph: **Day**, **Week** (default value), or **Month**.
  - d Click **Apply**.

*STEP RESULT:* The Dashboard displays information for all locations within the specified date range.

2. From the Response Summary section, find the tile for the question where the reply was received.
3. Once you find the tile, click **Menu** and then select **Log**.

*STEP RESULT:* The tile displays a granular view of the responses.

4. From the tile's Search field, begin typing the snippet of text.

*STEP RESULT:* The results update in real-time with the conversation.

5. From results, click **view conversation**.

*STEP RESULT:* The full conversation displays.

# Navigation Bar Menu Options

**Table A-1:**Navigation Bar menu options

Menu Option	Description
<i>Your Name</i>	Click to access the My Profile and Sign Out menu options.
Survey Options	Click to access the Export menu option. The survey export (*.csv) is emailed to your inbox.
Dashboard	The Dashboard provides a overview of the health of your business.
Alerts	The Alerts page displays customer messages that require attention as they requested contact.
Completions	The Completions page displays Initiations/Completions report.
NPS Report	The NPS Report page displays information pertinent to determining the Net Promoter Score (NPS).
Topic Explorer	The Topic Explorer page displays the conversation topics analytics.
Monthly Report	The Monthly Report page displays a monthly overview of the health of your business.
NPS Booster	The NPS Booster page tells you what Topics have the biggest impact on your Net Promoter Score (NPS) or Customer Satisfaction Score (CSAT).
Benchmarks	The Benchmarks page displays key metrics that lets you track the performance of all of your locations at a glance by comparing their NPS Scores and Initiations.
Data Exports	The Data Exports page allows you to create a single (or repeating) data export with filters.
Signage	The Signage page allows you to preview signage for a specified location.
Simulator	The Simulator page allows you to have a preview of the customer conversation. Note that simulator results are not reflected in the dashboard.
Conversations	The Conversations page displays all of your business' surveys.
Give Feedback	Give us feedback on the platform.
Help	Opens the Chatter Research Help Center.