



CMI's Dashboard Solutions

CMI's Standard Dashboard Solution



Comprehensive Dashboard Solution



Ad-hoc

Streamline survey report production using our built-in template library. Achieve efficiencies of up to 40%.



Digital Experience

Integrate adobe analytics data with mobile and digital experience tracking to provide a comprehensive view into the digital experience.



Customer Experience

Create engaging CX portals tailored to your organization's needs. Start simple and add modules over time.



Employee Experience

Show group results in context, compare across company averages and benchmarks. Control access to data at all levels.



Digital Journey

Map the full digital customer journey's touchpoints and monitor customer experience.



Closed Loop Feedback

Integrate your CLF into one SSO platform with the dashboard.



Relationship Studies

Monitor the success and be alerted to potential issues that may arise within your relationship studies.



Qualitative Insights

Create a complete customer experience report by combining survey data with video, images, and qualitative findings.



Additional Data Sources

Generate unique report options from large data sets utilizing CMI's data hub integration.

Key Features of Standard Dashboards



PowerPoint Automation

Easily create comprehensive chart decks to show key findings without having create tables first.



Cross Tabulation

Drag and drop variables, apply filters, choose calculations, apply stat testing and much more.



Standard Analytics

Apply weighting, stat testing, net creation, computing variables and so much more with built in features to automate common analytical tasks.



Stay Alert and Stay on Time

Base size warnings either alert the user or hide data. Additional functionalities and features can also be customized for each report user.



Sharing

Export decks and share with the ability to add extensive user access controls and management.

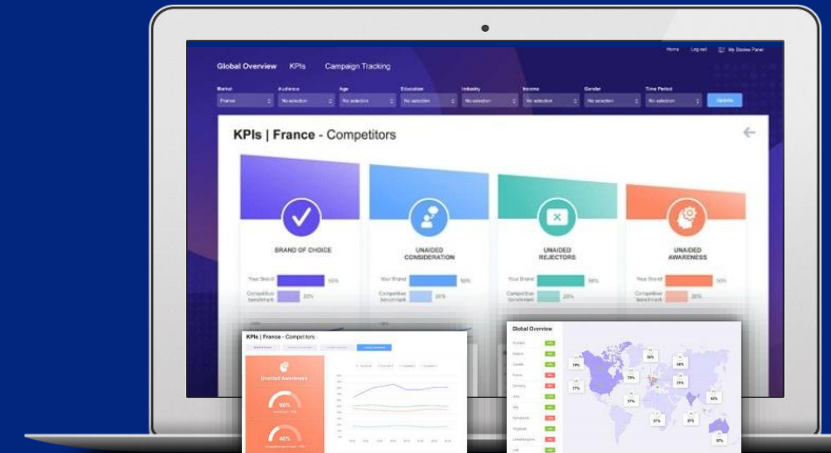
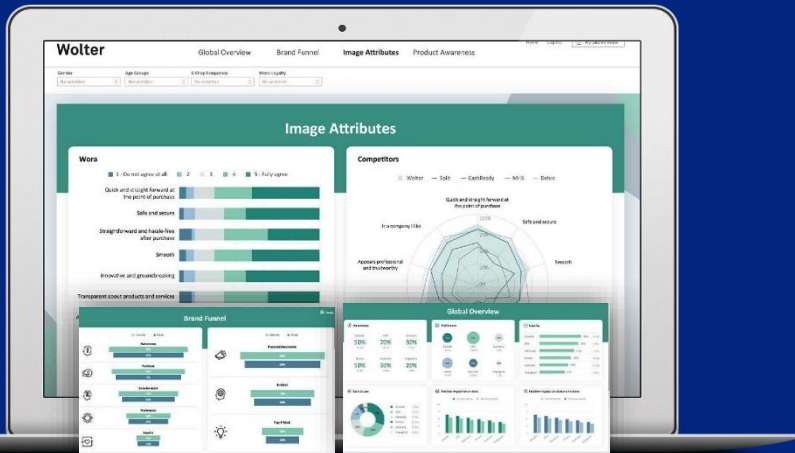


Batch Reporting

Generate PowerPoint decks with different data configurations. For example, same deck by country, product etc. And can be programmed to run while user is offline.

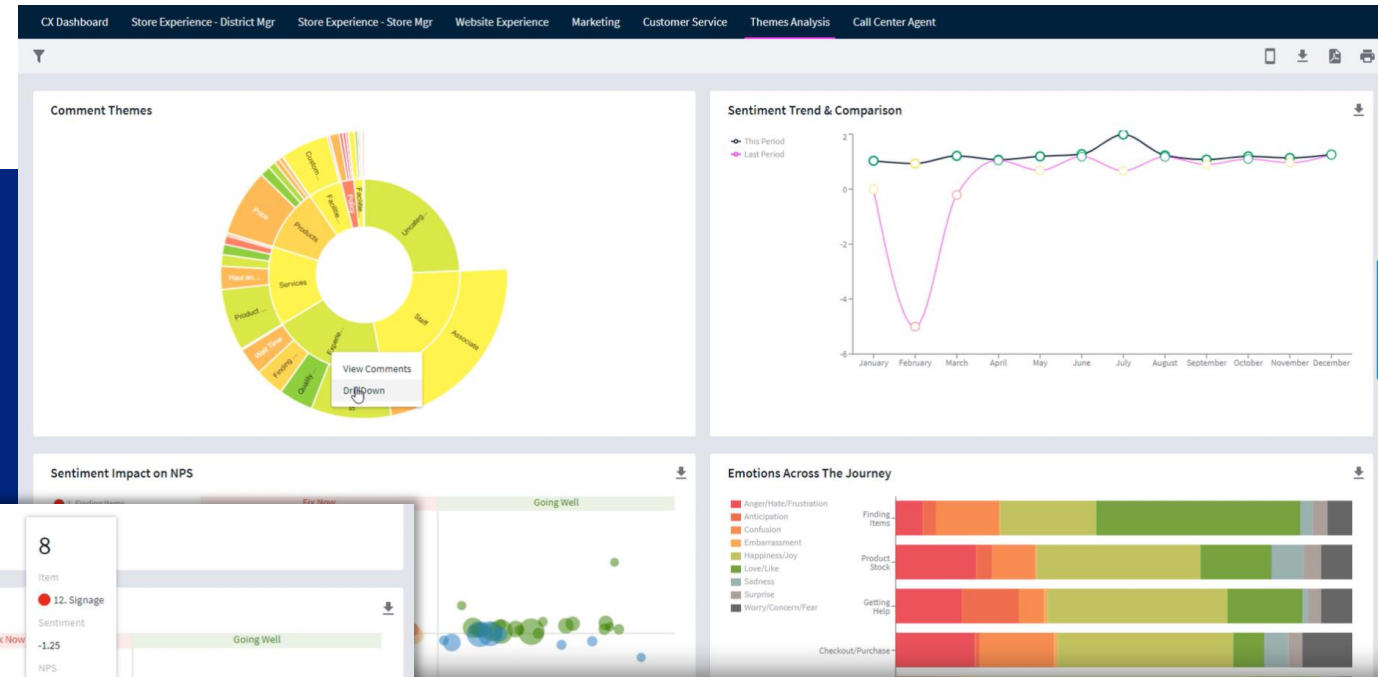
Interactive Dashboards

Customized dashboards that are uniquely designed to meet the needs of the program both now and into the future



NLP Dashboards

- ✓ **Integrated, deep text & sentiment analysis** connect, compare, contrast sources of unstructured data together and to structured data.
- ✓ **Turns qualitative text into structured, visual data** to understand the "why" behind customer responses and behavior.
- ✓ **Accommodates all different types of speech or text** including but not limited to primary research, reviews/ratings, voice (speech)/recordings, social media, and transcripts.
- ✓ **Automated email alerts**
 - statistically significant changes in specific metrics
 - scheduled reports sent out weekly, monthly, quarterly, or annually.



All Comments	NPS	Sentiment
"X" Buford does all 26 of our solution and everyone always is cheerful and helpful Staff Attributes Staff Attributes / Attitude Staff Attributes / Helpfulness Problem Resolution Status: Resolved / Unresolved 09 Aug '17	9	Positive
Currently I am very happy with the service and the product. Problem Resolution Resolution / Quality of Service Product 24 Jul '17	9	Positive
I saw at Fletcher's the next day the Braun product was buy two and get two free. Josh has always great to us. Product 31 May '17	9	Positive

Trending NLP Results

Combined Feedback (Weighted: Social/Reviews/Online/Store)

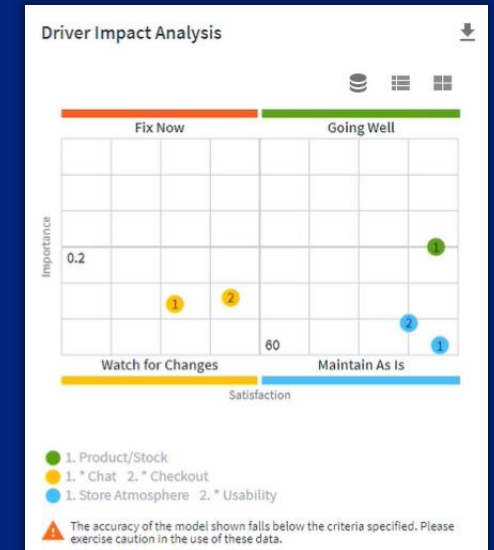
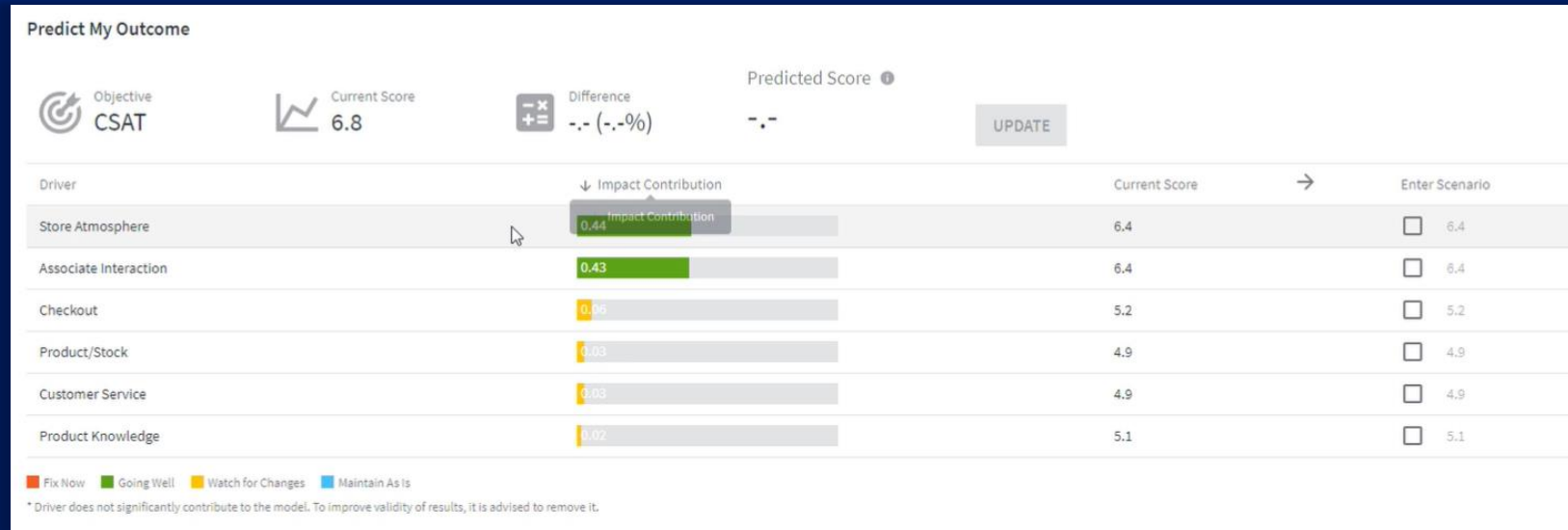
	% of Total Comments	# Comments	Avg. Sentiment	Sentiment Trend (by month)	Positive	Neutral	Negative
Total	277%	94 652	0.9		56% 52908	7% 7058	37% 34686
▶ Problem Resolution	46%	15 715	0.9		55% 8656	9% 1365	36% 5694
Product	42%	14 249	0.1		47% 6747	8% 1179	44% 6323
▶ Staff Attributes	36%	12 386	1.5		64% 7914	3% 368	33% 4104
Uncategorized Comments	18%	6 087	1.6		51% 3113	32% 1938	17% 1036
Customer Service	16%	5 549	1.1		62% 3416	3% 167	35% 1966
▶ Phone or Chat Experience	2%	715	-3.1		20% 142	0% 0	80% 573
Website	1%	389	0.2		52% 203	0% 0	48% 186
▶ Billing	1%	352	-3.8		12% 43	0% 0	88% 309
▶ Reason for Contact	1%	260	-5		0% 0	0% 0	100% 260

Tracking and trending customer sentiment analysis over time empowers you to make data-driven decisions, improve your products and services, manage your reputation, and maintain strong customer relationships.

This ongoing monitoring ensures that you remain adaptable, customer-centric, and competitive in a rapid business landscape.

Simulate Changes to CSAT Scores

Utilize our Key Driver Analysis to run simple simulations to understand the impact of various touchpoints on CSAT or NPS



Easily Run Real Time Crosstabs

Access up-to-the-minute results with real-time reporting. Review survey data and dissect it by various segments that you can save for team collaboration or personal use.

Technology Report

Total Completions: 200 Total Qualified: 140 Total Today: 200 Field Dates: 6/19/2020 - 6/25/2020

Gender x Age

	Male				Female			
Total	18-24	25-34	35-44	45-54	18-24	25-34	35-44	45-54

Product Awareness

Which Samsung cell phones are you interested in?

Total	Galaxy S9	Galaxy Note 8	Galaxy S8 Active	Galaxy S8+	Galaxy S7 Active	Other Samsung Phone

Status

Total	Terminated	Overquota	Qualified	Partial

Total Qualified

Total

Settings

Name: New Crosstab

Description:

Filters

Date Range: All (06/19/20 - 06/25/20)

From: 06/19/2020 To: 06/25/2020

Additional Filter: None

Content

Participant Status: Qualified Only

Table Set: All

Basing

% Base: Total Answering

Weighting: None

Crosstab Preview

	Male				Female			
Total	18-24	24-34	35-44	45-54	18-24	24-34	35-44	45-54
A	B	C	D	E	F	G	H	I

Stat Testing

Stat Test Groups: B-E,F-I

Stat Test Levels: 95% / 90%

Stat Test Type: Z-Test

Z-Test Type: T-Test no Overlap

Analyze results by changing bases, applying weighting and modifying stat testing groups, levels and type. Reporting banners can be filtered by a variety of standard attributes like date ranges and participant status, as well as by custom filters.

Run Quick Split Crosstab

Question Log Date Log Saved Crosstabs

Questions

gender. Are you...?

age. Please click on the category that includes your age.

q1. Which Samsung cell phones are you interested in?

q2. How would you rate each of the Samsung cell phones you are interested in?

q3a. How would you rate each of the Samsung cell phones you are interested in?

q3. Here is the new Samsung Galaxy S7 Edge. Look carefully at what you see. After 10 seconds, you will automatically be...

Total Male Female

A B C

Run Crosstab with 3 segments

Quickly create nested or appended banners with just a few clicks. Fully customizable reporting banners can be based on any information that is part of the survey project.

Q4000 Please rate the following:
It is easy to do business with Allstate

	Total	Has Agent			NPS Category		
		Yes	No	Promoter	Neutral	Detractor	
Total	100%	100%	100%	100%	100%	100%	
	318909	290407	20582	20666	60856	48267	
Top 2 Box Net	66%	69% C	57%	91% EF	34% F	10%	
	216278	204494	11784	190730	20840	4708	
10 Completely Agree	53%	54% C	45%	75% EF	15% F	6%	
	170374	161217	9157	158100	9422	2852	
9	14%	15% C	13%	16% F	19% DF	4%	
	45904	43277	2627	32630	11418	1856	
8	12%	12%	13% B	6%	35% DF	9% D	
	38177	35479	2698	12515	21350	4312	
7	5%	5%	7% B	2%	16% DF	9% D	
	17528	16063	1465	3216	9974	4338	
6	3%	3%	4% B	1%	6% D	10% DE	
	9690	8793	897	1248	3799	4643	
5	4%	4%	6% B	1%	5% D	19% DE	
	13734	12512	1222	1352	3246	9136	
4	1%	1%	2% B	0%	1% D	7% DE	
	4590	4171	419	210	754	3626	
3	1%	1%	2% B	0%	1% D	8% DE	
	4353	3957	396	141	491	3721	
2	1%	1%	2% B	0%	0% D	6% DE	
	3032	2723	309	68	190	2774	
1 Completely Disagree	4%	3%	6% B	0%	0% D	23% DE	
	11527	10215	1312	186	212	11129	
Bottom 2 Box Net	5%	4%	8% B	0%	1% D	29% DE	
	14559	12938	1621	254	402	13903	
Mean	8.53	8.57 C	7.97	9.60 EF	7.92 F	4.67	
Median	10.00	10.00	9.00	10.00	8.00	5.00	
Standard Deviation	2.29	2.26	2.68	0.99	1.54	2.80	

Add a variety of chart types for a more intuitive analysis to each table. Charts can be exported to Excel and PowerPoint, as well as added to Saved Reports for live curated reports that can be shared.

Best-in-class
solution



CMI + Tableau Dashboard Solution



Transform your Reporting Strategy

CMI + Tableau

Discover Insights

Connect, prep, and visualize your data to discover business insights.

Machine Learning

Bring CMI's analytics to the forefront, infusing machine learning into every dashboard

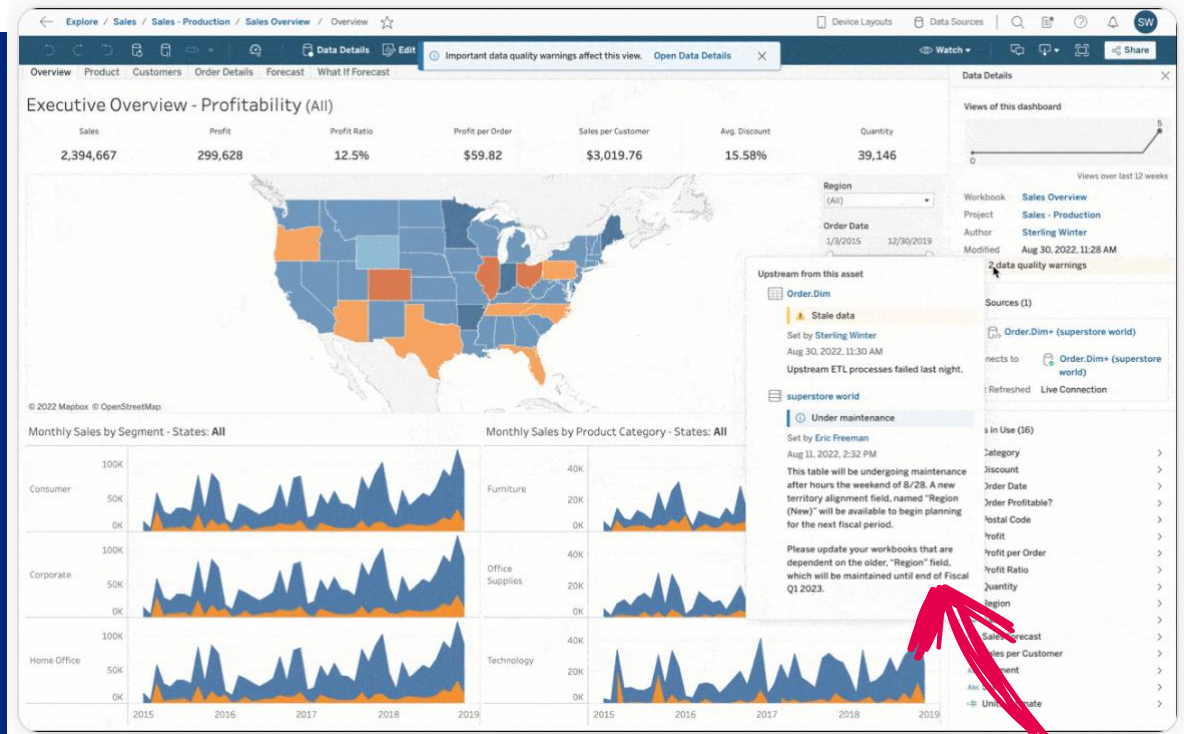
Automate & Scale

Automate time-consuming tasks and securely scale across your entire enterprise.

Empower Everyone with AI

Empower data consumers with AI-powered tools so you have more time to do the work you love to do.

Automatically Receive Notifications

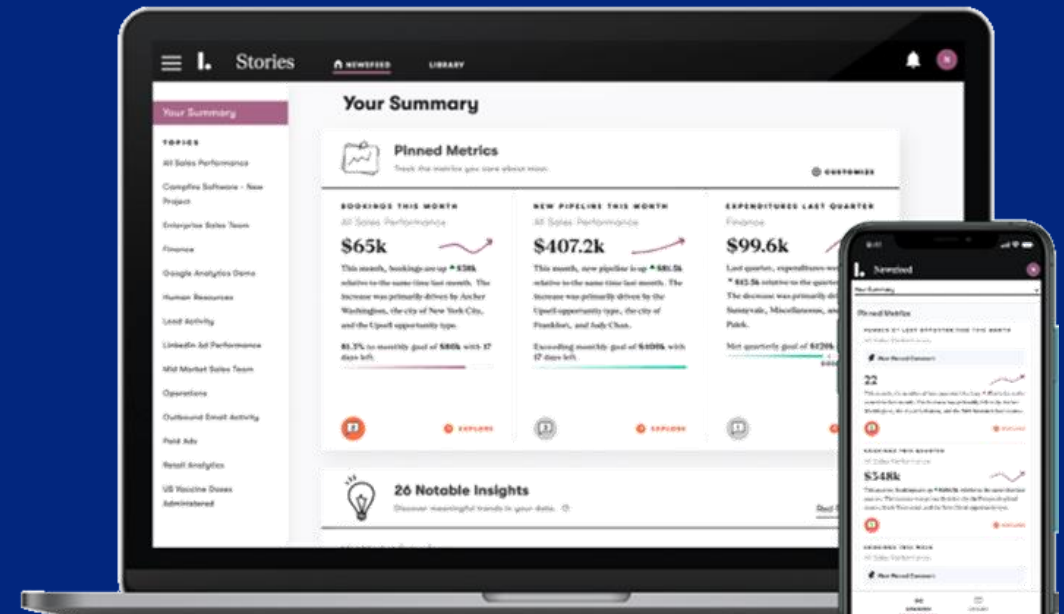


Notification Panels Allow Users to ...

- ✓ Identify data outliers
- ✓ Be notified of schedule maintenances
- ✓ Be alerted to data issues
- ✓ Have a record of when the data was last refreshed

Personalized AI Summary Insights

- ✓ Personalized AI insights based on user login credentials
- ✓ AI summarizes data and provides a snapshot of results



Example

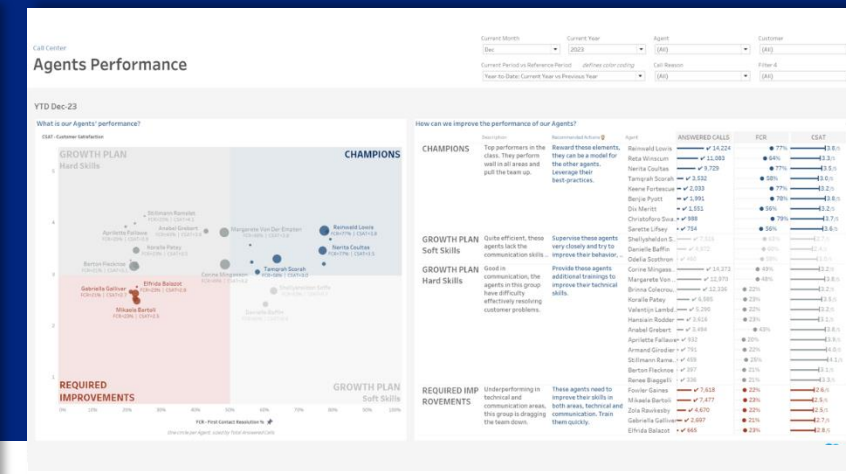
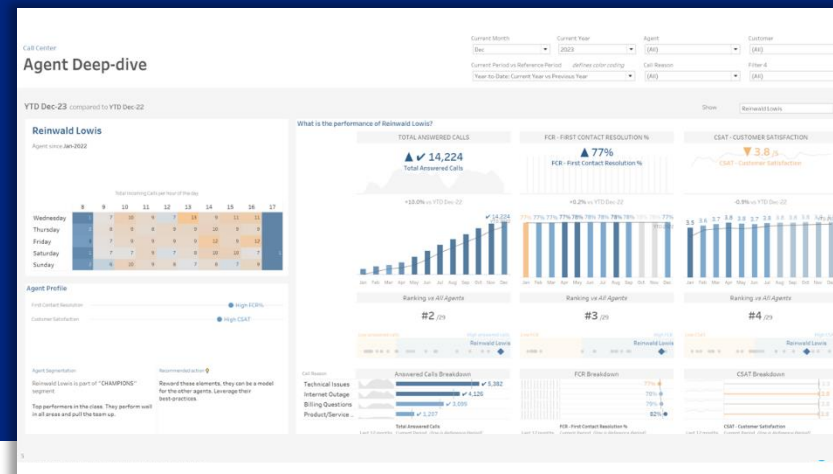
Integrating Call Center Data + IVR CSAT

Key Business Needs from Dashboard:

- ✓ Assess & Improve the performance of your Call Center
- ✓ Increase our quality of service and customer satisfaction
- ✓ Identify your top performing agents
- ✓ Better allocate resources according to peak periods
- ✓ Assess training requirements for your agents

Key Questions Answered with Dashboard:

- ✓ How many incoming calls do we handle?
- ✓ How many calls were answered/abandoned?
- ✓ How long do callers wait before hanging up?
- ✓ How long do callers wait before having their call answered?
- ✓ Which level of service do we deliver to our customers?
- ✓ How satisfied are they?

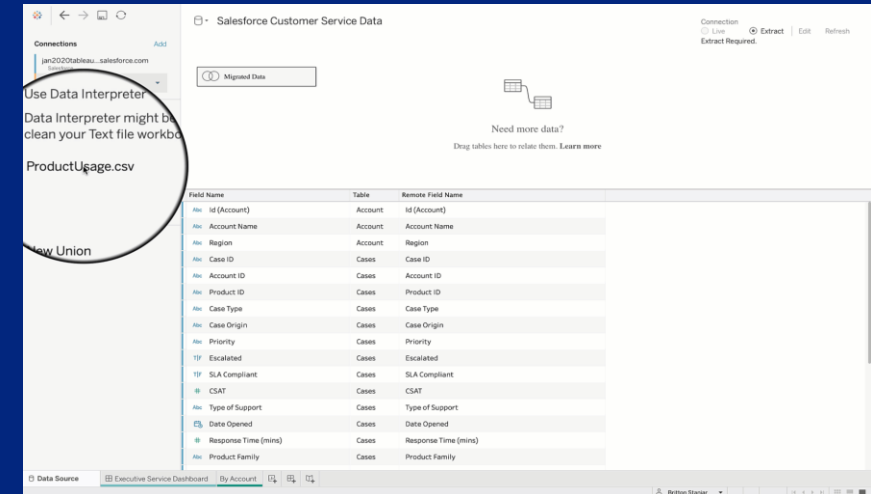
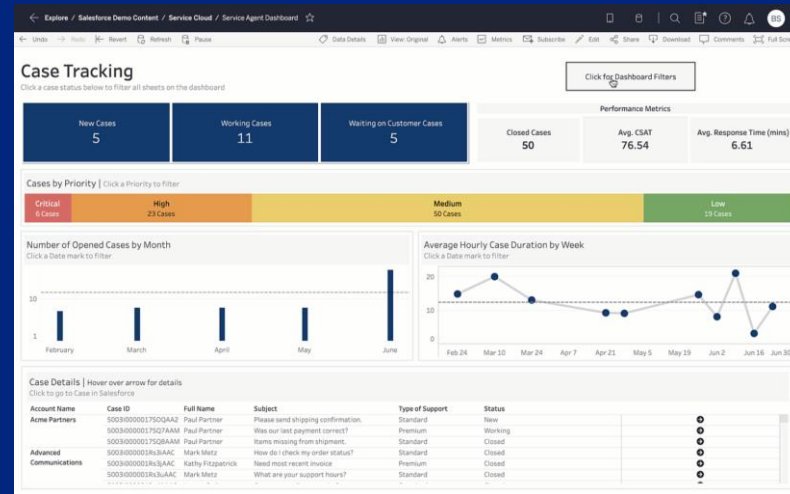
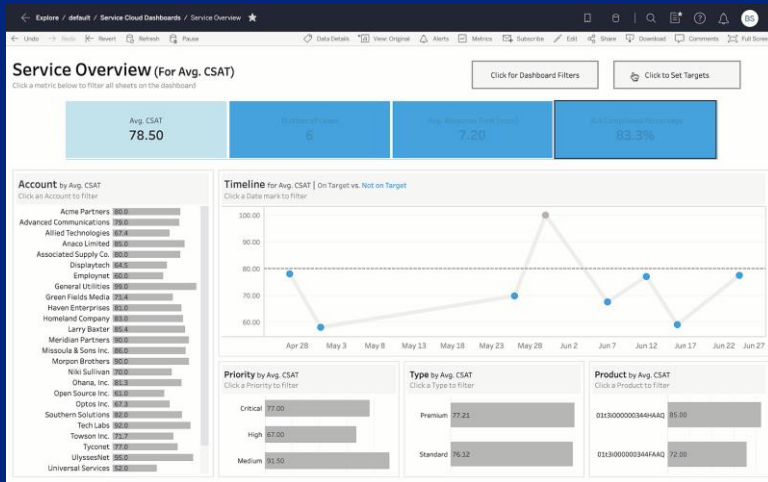


Integrating Salesforce CLF into Tableau

Track critical service metrics with targets & alerts

Empower service teams to see their performance

Uncover customer insights by bringing data together



Ask the Data

Ask Data allows people to use natural language to interact with data through a fast, powerful interface—it's as simple as typing a question with guided search suggestions to get instant answers. Results come in the form of rich data visualizations that enable business users to get the insights they want from their data.

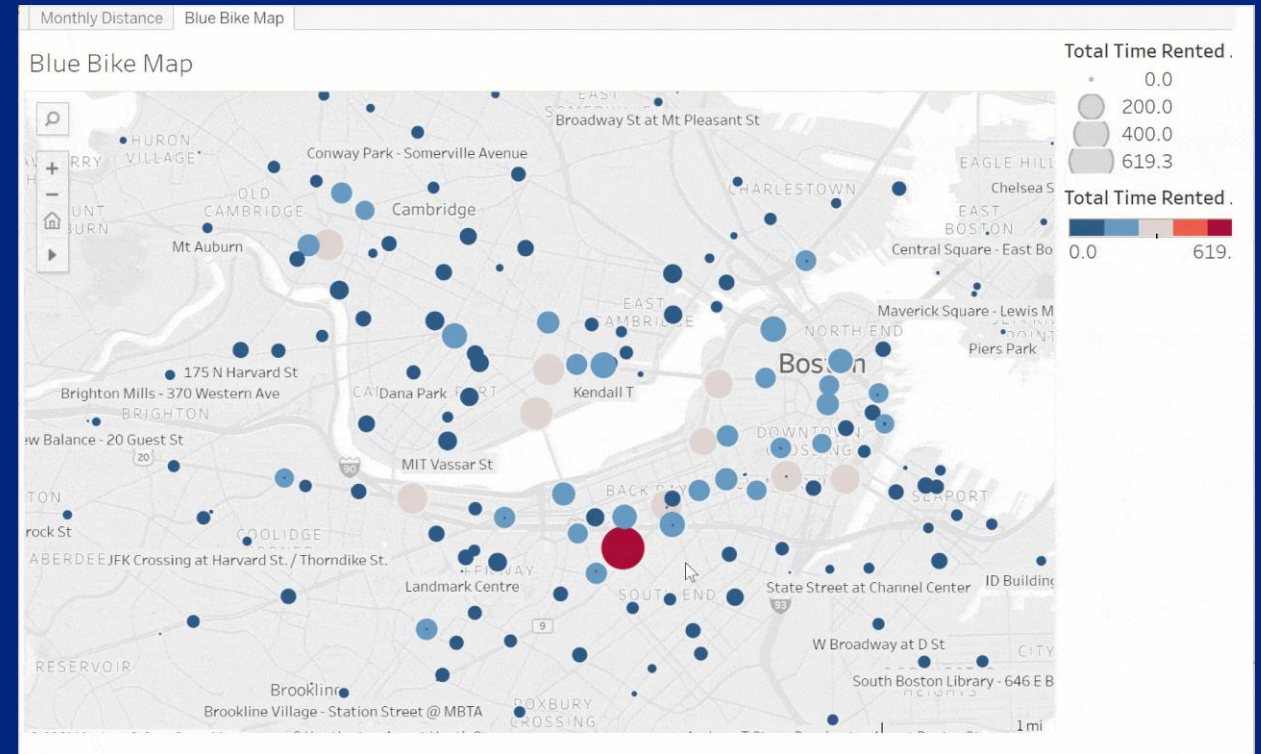
The screenshot displays the Ask Data interface. At the top, there is a navigation bar with tabs for Overview, Customers Ask Data, Ask Data (selected), Product, Shipping, Performance, Commission Model, Order Details, Forecast, and What If Forecast. Below the navigation bar, the interface is divided into three main sections:

- Data:** A search bar with the text "Search" and a list of data fields. The fields are grouped into categories: Location (Country, Region, State, City, Postal Code), Order (Order Date, Order ID), Product (Category, Sub-Category, Manufacturer, Product Name), Segment (Ship Date, Ship Mode), and other metrics (Discount, Profit, Profit Ratio, Quantity, Sales, Transactions).
- Search Results:** A search bar with the text "Search fields or values to create a visualization" and a blue arrow button. Below the search bar, there are sections for "No fields" and "No filters".
- Recommended Visualizations:** A section titled "Recommended Visualizations" with a dropdown menu for "Basic Data Analysis". Below the dropdown, there are three recommended visualizations: "sum of Sales", "Total Sales by State", and "Total monthly profit". There are also expandable sections for "Date and Time", "Filters", and "Viz Type".

At the bottom of the interface, there is a "Sheet 1" tab and a small icon.

Explain the Data

Explain Data automatically provides AI-driven explanations for the value of a data point with a single click. Based on advanced statistical models, explanations are integrated in existing workflows, saving users' time and unearthing new understandings about their data that they may not have found otherwise. The interactive feature offers analysts and business users alike a jumping-off point to fuel deeper data exploration.



cmⁱ