

**experience.com**

the world's best experience  
management platform

new features available in v2



We are excited to announce the release of the new Experience Management Platform (XMP). Based on on customer feedback, industry analysis, extensive testing and design improvements, we are confident with this major release, we have created the best customer experience platform available. It is now easier than ever to collect and analyze feedback, drive employee behavior, improve customer experiences, and power business outcomes with automation.

# what is new?

With this release, you now have the ability to:



Send multiple survey campaigns for each account



Customize survey look/feel with additional branding



Utilize new survey question types, skip logic and conditional logic



Integrate with multiple data sources for data and customer



Automate survey requests and reminders via SMS



Access improved reporting and dashboards including individual dashboards per campaign



Create unique survey campaigns for different tiers of the organization hierarchy



Manage listings data for locations AND individual agents



# campaigns

Automate customer journey-based feedback surveys at the moments that matter, then analyze and act on that data.

## Multiple survey campaigns (for each account)

We work with you to develop different customer, employee, and product surveys based on process timing. For example, you can automate surveys for loan closing, mid-process, post-application, and 30 days post-close. This flexibility also gives you the ability to build different survey campaigns by department or business function. An insurance company could send different survey campaigns for each department - automotive, home, life.



North Pacific - Retail Mortgage / Campaigns / Create Campaigns

Create Campaign >

• Add Primary Questions

• Secondary Workflow

• Set Conditions

• Campaign Settings

• Email Setup

• SMS Setup

• Ranking Score

• Branch Question

• Activate Campaign

Reports

Add Primary Questions

Survey Name  
Eg : Customer Engagement Survey

+ Add New Question

Multiple Choice

Rating Scale Question

Likert scale questions

Dropdown

Matrix Question

Slider Question

Open-Ended

Ranking Question

Upload Question

Image Question

## Expanded set of survey question types

You can now build campaigns with an expanded list of survey question types.

## Integrate with multiple data sources

You can now integrate multiple data sources to trigger campaigns. For example, integrate your CRM to trigger customer campaigns and your HRM to integrate employee CX performance with rewards and payroll.

## Customized survey logic with branching, conditional, and skip logic

Smart survey formats change what the respondent sees based on their responses to boost engagement. Workflows are triggered for good or poor survey responses based on the initial gateway question response.



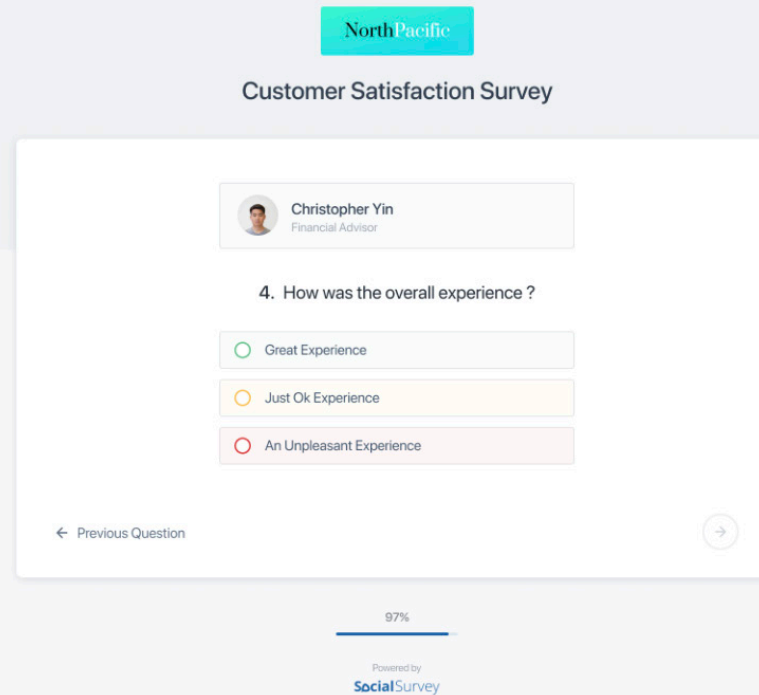
# campaigns (continued)

## Send automated survey requests and reminders via SMS

Deliver surveys to your customers on-the-go through text message.

## Send surveys from any person or business channel

Flexible campaigns allow you to send surveys on behalf of an individual agent or employee, on behalf of a department, location, or company.



North Pacific

Customer Satisfaction Survey

Christopher Yin  
Financial Advisor

4. How was the overall experience ?

☒ Great Experience

☐ Just Ok Experience

☐ An Unpleasant Experience

← Previous Question

97%

Powered by  
SocialSurvey

## Comprehensive survey reporting

View customized dashboards for each campaign so you can view scores, response rates, feedback, NPS, and more.



# reviews management

View, reply, filter, and manage all of your reviews in one easy to use dashboard.

## Bulk reviews management for all tiers (admin, locations, tiers, users)

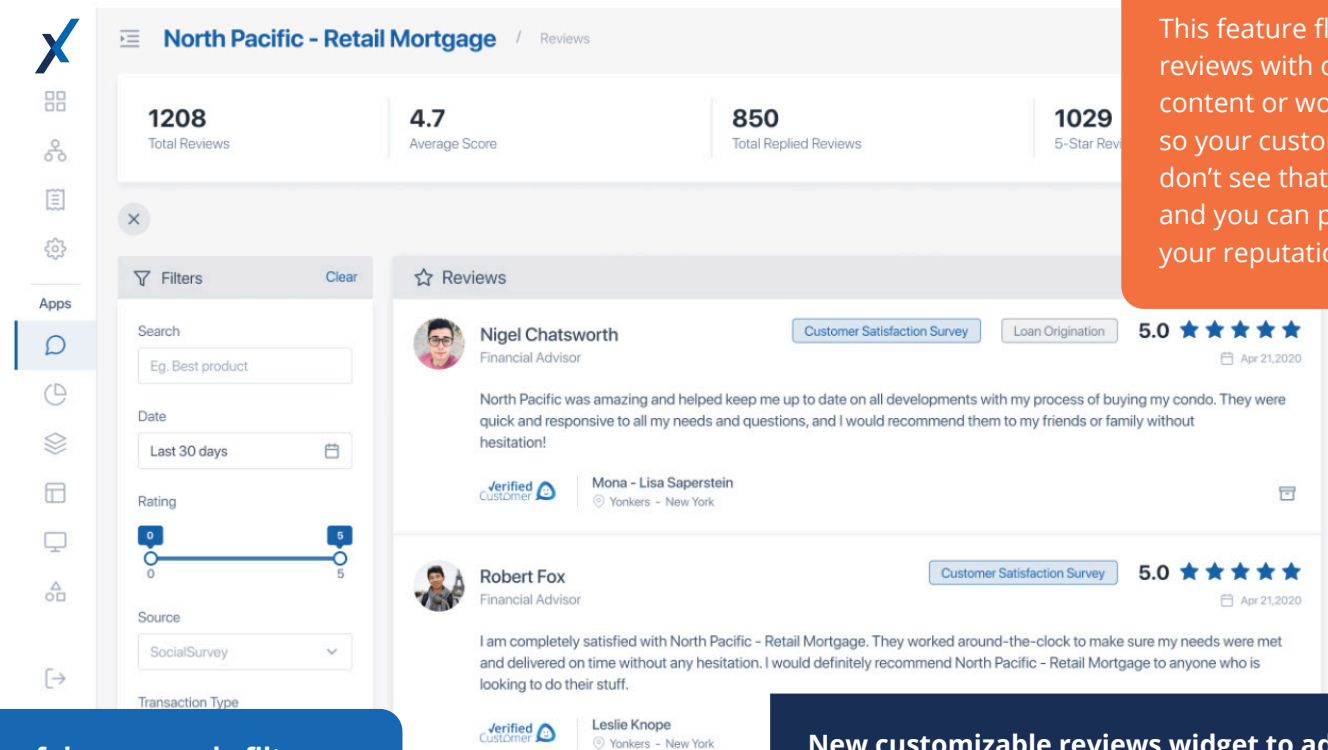
This unique platform feature allows customers to reply and manage reviews from multiple locations all through one login, including third-party reviews like Google.

## Powerful new search, filter, and sort features

Filter and sort reviews by source, score, reply status, date range, location, specific employee being reviewed.

## Manage and triage flagged reviews

This feature flags reviews with offensive content or wording, so your customers don't see that content and you can protect your reputation.



**North Pacific - Retail Mortgage** / Reviews

1208 Total Reviews | 4.7 Average Score | 850 Total Replied Reviews | 1029 5-Star Reviews

**Filters** Clear

Search: Eg. Best product

Date: Last 30 days

Rating: 0 to 5

Source: SocialSurvey

Transaction Type

**Reviews**

**Nigel Chatsworth** Financial Advisor  
Customer Satisfaction Survey | Loan Origination | 5.0 ★★★★★ | Apr 21, 2020

North Pacific was amazing and helped keep me up to date on all developments with my process of buying my condo. They were quick and responsive to all my needs and questions, and I would recommend them to my friends or family without hesitation!

**Verified Customer** | Mona - Lisa Saperstein | Yonkers - New York

**Robert Fox** Financial Advisor  
Customer Satisfaction Survey | 5.0 ★★★★★ | Apr 21, 2020

I am completely satisfied with North Pacific - Retail Mortgage. They worked around-the-clock to make sure my needs were met and delivered on time without any hesitation. I would definitely recommend North Pacific - Retail Mortgage to anyone who is looking to do their stuff.

**Verified Customer** | Leslie Knope | Yonkers - New York

## New customizable reviews widget to add to any website

Create widgets with company branding to display on your website and showcase your great reviews.



# profile pages

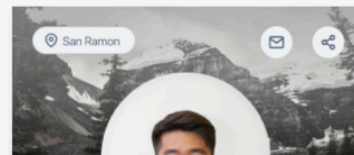
Consolidate your review, location, and business data on individual SEO-optimized professional pages, all indexed to match your company structure.

Improved design  
using card layout for  
mobile optimization

experience.com

Search location, business, agent,...

Mortgage / North Pacific Mortgage / Midwest / Bettendorf, IA



Edward Jones

Senior Loan Consultant | NMLS #406037

★★★★★ 5.0

Total	Verified	Recent
547	234	34

Agent at San Ramon

North Pacific

(415) 571-1234

Visit Website

## Reviews

Powered by Socialsurvey

Write a review

Shauna M  
Pawnee, IL

Posted on Dec 3, 2019

5.0 ★★★★★ • Great Experience  
for Edward Jones • Retail Mortgage

Verified Customer

North Pacific was amazing and helped keep me up to date on all developments with buying my condo. They were quick and responsive to all my needs and questions. [read more](#)

Facebook Twitter LinkedIn

Reply from Gowtham K  
Apr 21, 2020

Tom was really helpful when I needed to book the Gazebo at my local park. I would recommend anyone to work with him when setting up their next event or party.

Jimmy H  
Pawnee, IL

Posted on Dec 3, 2019

5.0 ★★★★★ • Great Experience  
for Marvin McKinney • Retail Mortgage

Verified Customer

North Pacific was amazing and helped keep me up to date on all developments with my process of

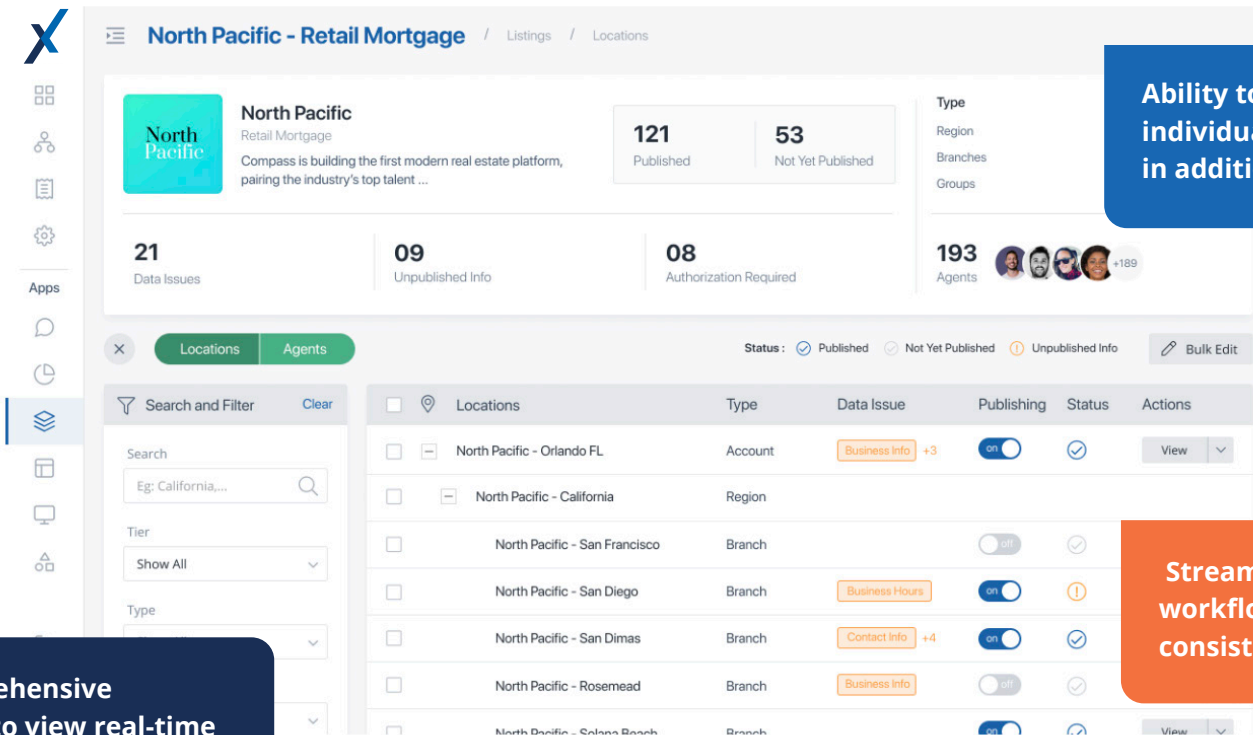
Page templates optimized  
for SEO (platform optimized  
html)

Each review has a  
customized URL to  
increase web mentions



# listings

Manage one "source of truth" for all company and individual practitioner location pages on directory sites like Google My Business



The screenshot displays a dashboard for "North Pacific - Retail Mortgage". The top navigation bar includes a sidebar with icons for various functions and a main header with the company name and navigation links for "Listings" and "Locations".

The dashboard features several key sections:

- Summary Cards:** Located at the top, these cards provide quick access to various metrics:
  - North Pacific:** Retail Mortgage. Compass is building the first modern real estate platform, pairing the industry's top talent ...
  - Published:** 121
  - Not Yet Published:** 53
  - Data Issues:** 21
  - Unpublished Info:** 09
  - Authorization Required:** 08
  - Agents:** 193
- Search and Filter:** A section on the left with a search bar (placeholder: "Eg: California,...") and filters for "Tier" (set to "Show All") and "Type".
- Table:** A central table listing various locations and their associated data. The table has columns for "Locations", "Type", "Data Issue", "Publishing", "Status", and "Actions".

Locations	Type	Data Issue	Publishing	Status	Actions
<input type="checkbox"/> North Pacific - Orlando FL	Account	Business Info +3	on	✓	View
<input type="checkbox"/> North Pacific - California	Region				
<input type="checkbox"/> North Pacific - San Francisco	Branch		off	✓	
<input type="checkbox"/> North Pacific - San Diego	Branch	Business Hours	on	⚠	
<input type="checkbox"/> North Pacific - San Dimas	Branch	Contact Info +4	on	✓	
<input type="checkbox"/> North Pacific - Rosemead	Branch	Business Info	off	✓	
<input type="checkbox"/> North Pacific - Salinas Branch	Branch		on	✓	View

Ability to manage and publish individual practitioner listings, in addition to location listings

New comprehensive dashboard to view real-time listing data and status

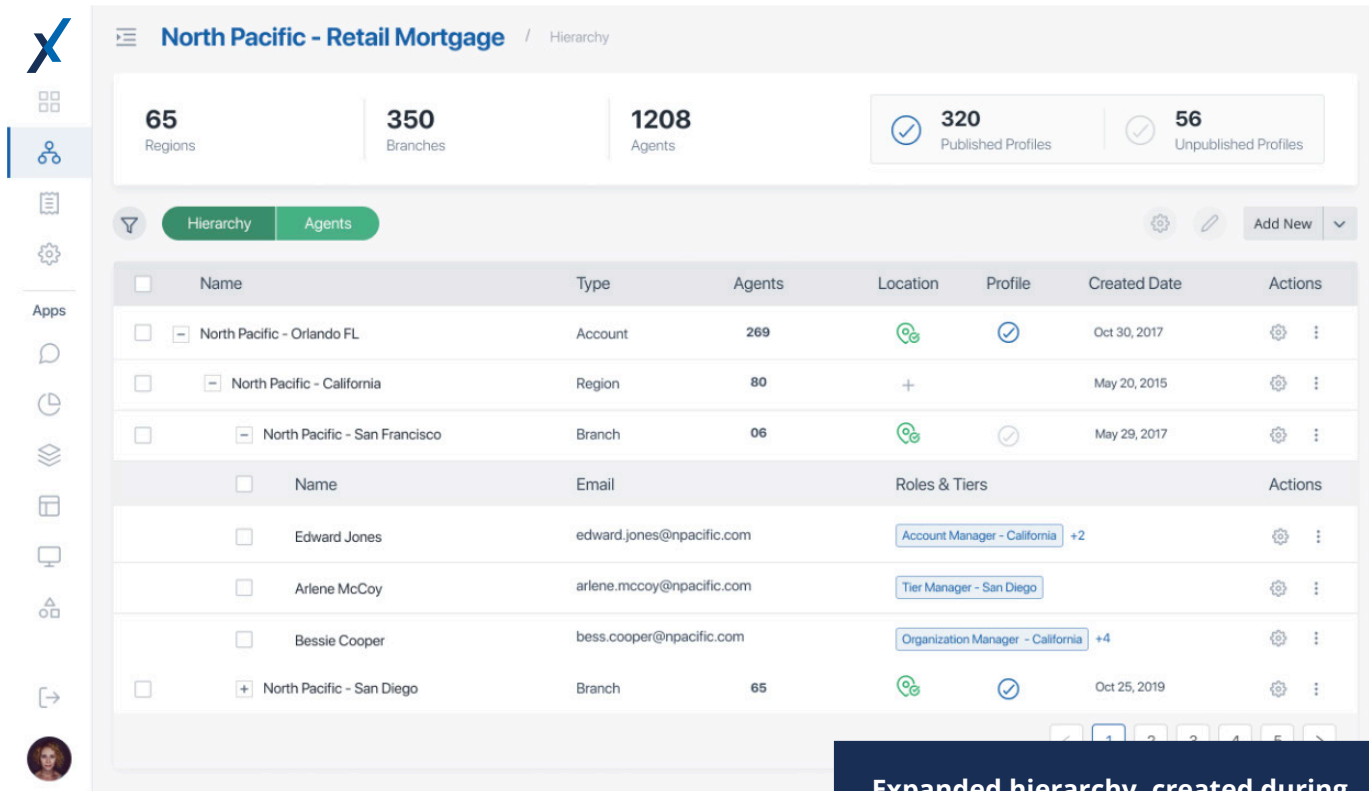
Streamlined publishing workflow to simplify listing consistency



# manager (admin) settings

Easily manage user access and permissions, tied to your unique company hierarchy

Ability to update hierarchy information, settings, and permissions from one dashboard



The screenshot displays the 'North Pacific - Retail Mortgage' admin dashboard. The top navigation bar includes a blue 'X' logo and a breadcrumb trail: 'North Pacific - Retail Mortgage / Hierarchy'. Below the navigation bar, there are four summary cards: '65 Regions', '350 Branches', '1208 Agents', and '320 Published Profiles' (with a checkmark icon). To the right of the 'Published Profiles' card is another card for '56 Unpublished Profiles' (with a checkmark icon). Below these cards are two tabs: 'Hierarchy' (selected) and 'Agents'. To the right of the tabs are icons for settings, edit, and a dropdown menu labeled 'Add New'. The main content area is divided into two sections. The top section is a table with columns: Name, Type, Agents, Location, Profile, Created Date, and Actions. It lists three items: 'North Pacific - Orlando FL' (Account, 269 Agents), 'North Pacific - California' (Region, 80 Agents), and 'North Pacific - San Francisco' (Branch, 06 Agents). The bottom section is a table with columns: Name, Email, Roles & Tiers, and Actions. It lists three agents: 'Edward Jones' (Account Manager - California, +2), 'Arlene McCoy' (Tier Manager - San Diego), and 'Bessie Cooper' (Organization Manager - California, +4). At the bottom of the dashboard, there is a pagination bar with the number '1' selected.

Name	Type	Agents	Location	Profile	Created Date	Actions
North Pacific - Orlando FL	Account	269			Oct 30, 2017	
North Pacific - California	Region	80	+		May 20, 2015	
North Pacific - San Francisco	Branch	06			May 29, 2017	

Name	Email	Roles & Tiers	Actions
Edward Jones	edward.jones@npacific.com	Account Manager - California +2	
Arlene McCoy	arlene.mccoy@npacific.com	Tier Manager - San Diego	
Bessie Cooper	bess.cooper@npacific.com	Organization Manager - California +4	

Expanded hierarchy, created during white-glove onboarding process, to match any business structure (no limit to tiers in hierarchy)



# experience.com

Questions about these new features? Want to add these features to your platform?

Contact your customer success manager or call (888) 701-4512