



# How We Partner With You Towards Your Success

Presented by:

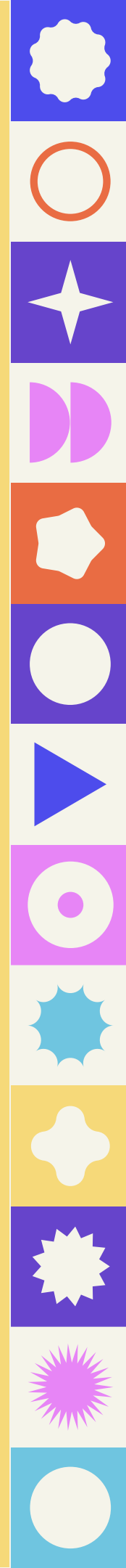
Bethany Remely, VP Global Customer Success Manager

Erika Cost, Global Manager ETA

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# The different assets that are here for you:



In no particular order 😊

- 1) Customer Support
- 2) Bluenotes Community
- 3) Online Help Center
- 4) Explorance Training Academy
- 5) Customer Success Managers

# Customer Support

## How we make sure you are taken care of!

- **Review customer feedback**
  - We review all customer feedback, and we use your feedback to improve our processes and train our Customer Support agents
  - Any product feedback provided we share with the product team
- **Follow the sun support**
  - We have customer support agents available to assist you globally.
  - Any urgent or high priority request received in Customer Support the ticket is worked on overnight through all our regions in order to provide you a quicker resolution (APAC, EMEA,NA).
- **Escalation Process**
  - When a ticket is received it is reviewed by a Customer Support Agent and a priority is set. If the agent can not resolve the issue the following steps will happen. The time for each escalation is dependent on the priority of ticket.

# Customer Support

## How we make sure you are taken care of!

### 1. Issue reviewed by the Customer Support Manager

- The Customer Support Manager will review the ticket with the CS agent
- They can increase the priority of the ticket if needed (severity of issue, date needed by, impact of issue...)
- Workaround may be provided to unblock the customer
- Internal ticket opened with Support Operations Team if solution can not be found.

### 2. Escalation to Level 2 (Support Operations Team)

- More depth analysis and investigation on the issue
- Issue is reproduced in local environment for investigation
- Workaround may be provided to unblock the customer
- Once confirmed it is a product issue an internal ticket is sent with development team (level 3)

### 3. Escalation to Level 3 for Product team

- Issue tracing to locate source of the problem
- Workaround may be provided to unblock the customer through temporary fix
- Patch created to address issue
- Fix may be assigned to a later release

### 4. Escalation to higher management

- Management teams discuss the issue and assign additional resources to the issue if needed
- They get involved in the investigation/solution to find ways to get this resolved quickly

# The Bluenotes Community

the Bluenotes Community was established to allow you to connect with and learn from other higher education institutions.

It all started in 2012 in Melbourne when RMIT called on a group of Blue Australian universities to join an Explorance seminar. The experience was a positive one. A community was established and everyone learned.

The success of the event led us to transform the informal user meeting into annual face-to-face four-day global learning events that provide workshops, real-life Blue implementation success story presentations, and a sneak peak of the latest and greatest Blue.



# Connect. Share. Learn. Grow.

- Community Engagement
  - Supports the Bluenotes Community institutions in advancing its community mission to “Connect. Share. Learn. Grow.”
  - Bluenotes community members connect with each other via various online and offline channels to meet and greet fellow Blue users, share successes and challenges, advance product knowledge and expertise for their institutions, learn more about the future of Blue, and help refine the vision of Explorance
  - Bluenotes Community Discussion Forums
  - Bluenotes Community Meetups
  - Webinars for Bluenotes Community
- **Bluenotes Conferences**
  - Bluenotes GLOBAL
  - Bluenotes APAC
  - Bluenotes Europe
  - Bluenotes MENA
- Contact:
  - Bluenotes Community Support Team ([bncommunity@explorance.com](mailto:bncommunity@explorance.com))



# Help Center



# Explorance Help Center

Join the community, search the knowledge base, submit a request, and more.

Search Blue Online Help

🔍 Filtered space search

**bluenotes** GLOBAL 2022 **Insight to Action: Driving Student Success** Palmer House | Chicago, IL, USA July 30 - August 3, 2022 [Register Today to Save!](#)

- Get started**  
Get to know the product with resources such as release notes. →
- User guides**  
Learn how to configure the system, projects, reports, etc. →
- Solutions and best practices center**  
Learn best practices, and discover solutions for end-of-term evals, midterm evals, 360 assessments, webinars, and more. →
- Add-on product guides**  
Learn about the tools that extend Blue's capabilities, such as DIG, BTA, Blue Connector, and others. →
- Technical resources**  
Find info on system requirements, APIs and maintenance windows. →
- Community resource sharing center**  
Get up to speed on resources and recommendations shared by the Blue community. →
- Participant guides**  
Learn how your participants (i.e., students, teachers, employees, etc.) interact with the tasks, LMS and dashboards you configure. ↗

- ▶ A to Z setup guides
- ▶ Best practices & tips
- Recent:
- ▶ Report visualizations
- ▶ 360 on-demand

- ▶ Customer presentations
- ▶ Community report samples
- ▶ Collaboration resources
- ▶ Blogs

★ Master release notes

## Online Help resources

- ▶ User guides
- ▶ Master release notes
- ▶ Solution and best practice center
- ▶ Participant guides
- ▶ Community resource sharing center

Guides for:

- ✓ Instructors
- ✓ Students
- ✓ Academic leaders



# Explorance Help Center

Join the community, search the knowledge base, submit a request, and more.

## Tools & resources

- ▶ Search results displaying FAQs and content preview
- ▶ API developer resource center (Functions, forums, sample code/GitHub)
- ▶ New solutions resources - Custom report layouts
- ▶ News and announcements space (e.g., releases, events, new content, etc.)

## Preview for search content

The screenshot shows a search bar with the text "opt out" and a magnifying glass icon. Below the search bar, a message states: "Your search for ""opt out"" returned 19 result(s)." A yellow callout box highlights the following content:

**DEFAULT PARTICIPATION (OPT-OUT AND OPT-IN)**

Most institutions have a policy that gives raters the choice to opt out of completing a questionnaire out of respect and consideration. Institutions can provide this opt-out feature in a few easily visible and accessible areas within Blue so raters can opt out of a Fillout task if they want to, namely from the **Tasks** list and from the questionnaire itself. Follow the instructions below to enable opt-outs from the task list and questionnaire.

1. Edit the project that should have the opt-out enabled.
2. Navigate to Project - Tasks and configure the Fillout task.
3. Show the Advanced options.

Below the callout, a link is shown: [Fillout \(FO\)](#) projects/tasks/fillout.htm#microcontent1

## FAQs in search results

The screenshot shows a search bar with the text "mapping" and a magnifying glass icon. Below the search bar, a message states: "Your search for "mapping" returned 7 result(s)." The search results list several articles:

- Create variable mapping presets**  
Overview Many client have data that involves industry-specific terms, or technical abbreviations which are difficult to detect using a machine learning model. For example, "PS" meaning "professional service", may not be detected when running an analysis because the model will consider this type of ...  
[midashboard/vardefpairs.htm](#)
- Import and analyze your data**  
The BlueML dashboard is a simple and efficient interface that runs text data through a machine learning categorization model. This article details data requirements and how to import datasets. This page contains... Data requirements Imported files must meet these basic requirements: Only Excel and ...  
[midashboard/dashboardupload.htm](#)
- Create topic views**  
This page contains... Overview Users can create a different structure for the topics used in the existing model. This new structure is called a view. Within the topic structure, hierarchies and topics can be renamed based on the needs of the organization so that the comments will be categorized and ...  
[midashboard/topicstructviews.htm](#)
- Dashboard introduction**  
This page contains... Free-form text comments provide some of the most valuable employee and student feedback available to leaders. BlueML analyzes this feedback in a quick and scalable way so that you can measure what matters most to your employees and students. The BlueML dashboard is extremely ...  
[midashboard/blueimdashboardintro.htm](#)

A yellow callout box highlights the following FAQ:

**What are Variable mapping presets?**

This term refers to definitions users can enter as Variable mappings to describe industry-specific terms, technical abbreviations or any phrases or names that are used within your organization that would be difficult for the machine learning model to detect and analyze. For example, employees / students might use a term such as AIS (a Group Variable) in their comments referring to your Administrative Information System. BlueML could more easily recognize its Definition "Administrative Information System" and provide an appropriate analysis.

Below the callout, another FAQ is visible:

**Is there a limit to the number of Group variables and Variable mappings that can be created?**

No.

# Explorance Help Center

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## Tools & resources

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## API Developers resource center

The screenshot shows a web browser window displaying the 'API Developers resource center' page. At the top, there is a search bar labeled 'Search Online Help'. Below the search bar, the page is divided into two main sections. On the left is a 'Contents' sidebar with a tree view. The 'Blue APIs' item is selected and highlighted in blue. Under 'Blue APIs', there are sub-items: 'Blue API usage scenarios', 'Blue restful APIs endpoints reference', and 'Blue SOAP APIs endpoints reference'. Below these are 'BlueML APIs', 'Bluepulse APIs', and 'MTM APIs'. The main content area on the right has a breadcrumb '>> Blue APIs' and a title 'Blue APIs'. Below the title is a paragraph: 'These are the available Blue API endpoint references. There is a mixture of SOAP endpoints and RESTful endpoints. Where possible the REST endpoints should be favored over the SOAP endpoints.' Below this paragraph is a section titled 'This section contains...' which lists several topics: 'Blue API usage scenarios', 'Using Blue web services to retrieve user task details (Sample code) Obtain links to a user's tasks', 'API Reference', 'Retrieve Blue response data in XML', 'Properties in base question', 'Single selection question', and 'Single selection table question'.

# Explorance Help Center

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## Tools & resources

- ▶ Search results displaying FAQs and content preview
- ▶ API developer resource center (Functions, forums, sample code/GitHub)
- ▶ **New solutions resources - Custom report layouts guide**
- ▶ News and announcements space (e.g., releases, events, new content, etc.)

## Custom report layouts guide

### Customize overall report styles

CSS code is included below for each of the areas identified in the following screenshot. The sample styles provided will be applied to the report style as shown below.

The screenshot shows a report titled "Term Evaluation of 101815 Cultures of Modern Canada / Annette Fong". The report includes a header with the Explorance logo and project details, a footer with the creator's name and date, and a main body with a table of competency statistics and two bar charts. Callouts identify the following elements:

- Report logo**: Explorance logo in the top left.
- Report header**: Project title and details in the top right.
- Border 1**: The top border of the report content area.
- Report footer**: Footer text at the bottom of the report content area.
- Border 2**: The bottom border of the report content area.
- Report block titles**: The title of the main content block, "I would rate the following aspects of the course as:".
- Report block table headers**: The header of the first table, "Competency Statistics".
- Report body**: The main content area, including the bar charts and the second table.
- Alternating table stripes**: The alternating light and dark gray rows in the second table.

Competency Statistics	Value
Mean	3.17
Median	3.50
Mode	1, 4, 5
Standard Deviation	1.59
Standard Error (base on SD)	0.46
Population Standard Deviation	1.52
Standard Error (base on PSD)	0.44

Statistics	Value
Response Count	4
Mean	3.25
Median	3.50
Mode	1, 3, 4, 5
Standard Deviation	1.71
Population Standard Deviation	1.48
Standard Error (base on SD)	0.85
Standard Error (base on PSD)	0.74

Partial view of a report table with callouts:

Standard Error (base on PSD)	0.18
Standard Error (base on SD)	0.24
Population Standard Deviation	1.28
Standard Deviation	1.21
Mode	1, 3, 4, 5
Median	3.25

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Join the community, search the knowledge base, submit a request, and more.

## Tools & resources

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- ▶ Search results displaying FAQs and content preview
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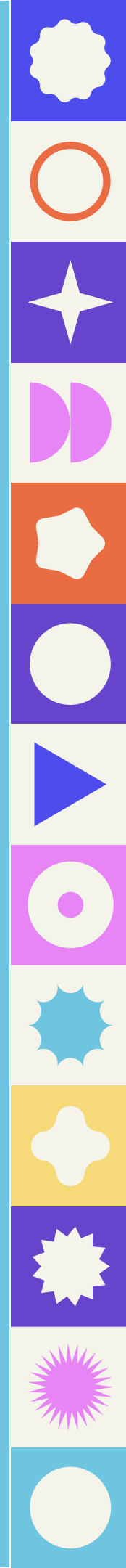
### News and announcements space on:

- ▶ Latest releases
- ▶ Upcoming releases
- ▶ Training schedule
- ▶ Upcoming webinars
- ▶ Community events
- ▶ Forums
- ▶ New content and articles
- ▶ Maintenance windows
- ▶ Etc.

# Explorance Training Academy (ETA)

- Enhancing the Blue Learning Experience

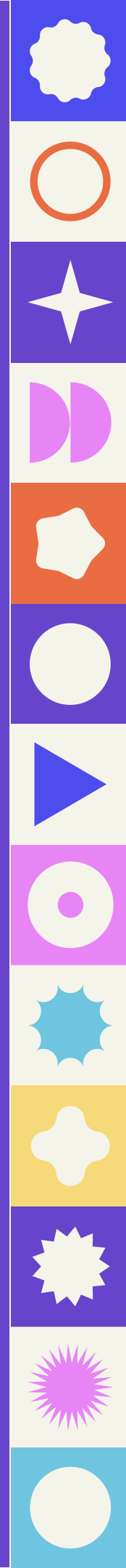
# Modernized Learner Experience

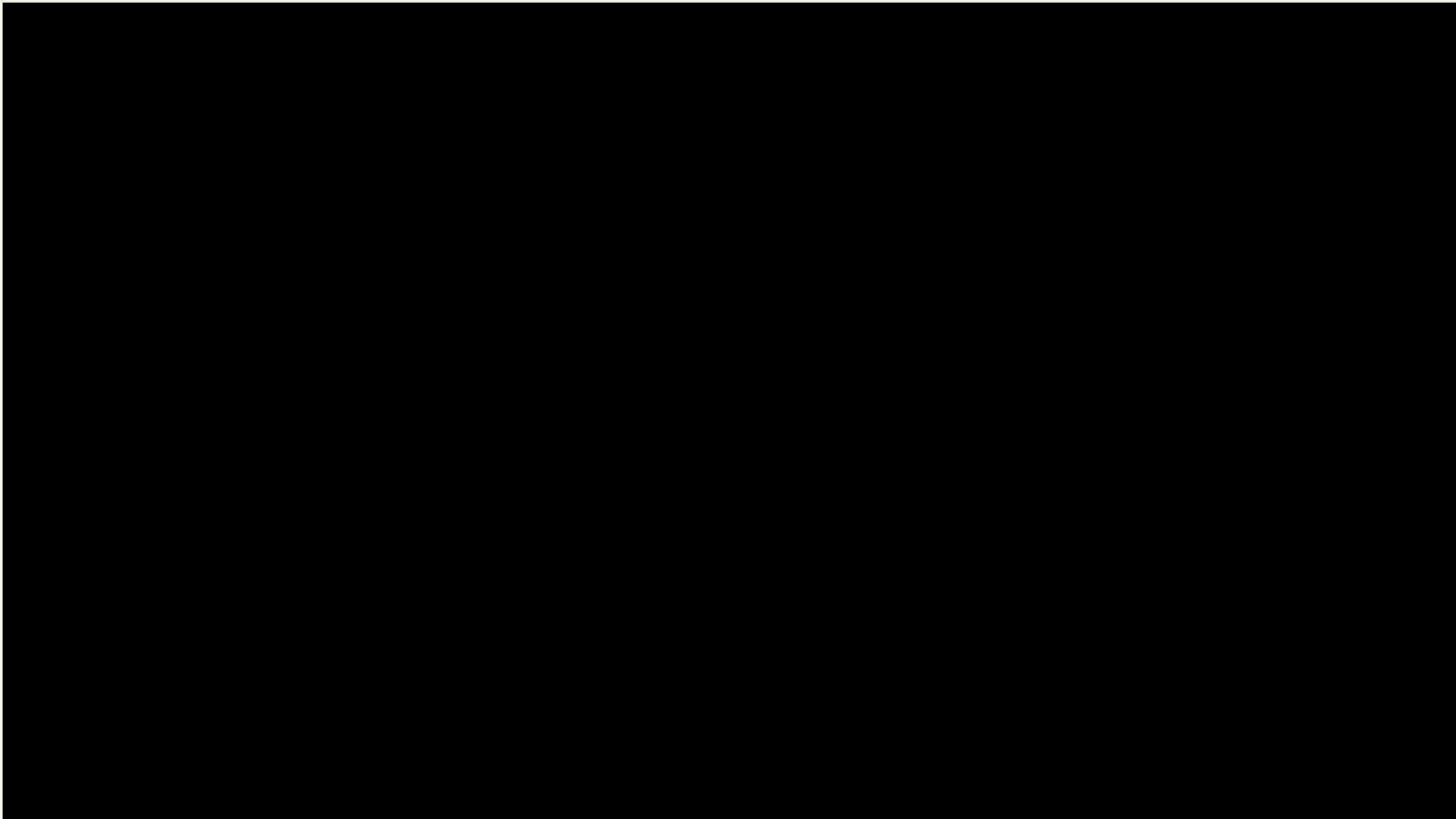


- Interface
- Technology
- Interactivity
- Embedded knowledge checks
- Videos
- Closed Captioning
- New LMS

# Context

- Blue Concepts
- Scenario-based
- Blue in Action
- Blue Reporting

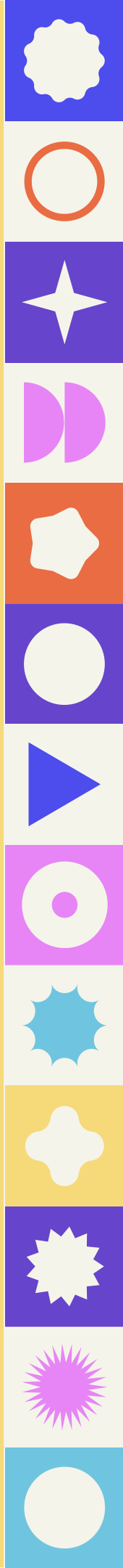






# What's Next

- Additional modularized content
- Intermediate and Advanced content
- Simulations
- Blended learning?



# Customer Success Management

Bethany Remely, VP Global Customer Success

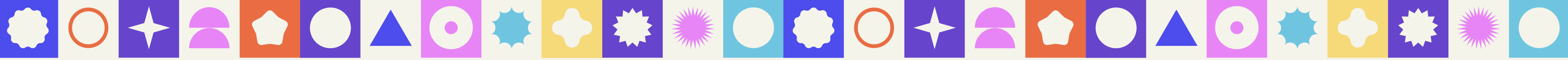


# Customer Success Management is...

- ✓ Proactive
- ✓ Coordinating your account team
- ✓ **Focused on helping your institution meet both short and long-term goals**

# Customer Success Management is **not**...

- X Technical Support
- X Outsourced Administration
- X Sales-focused



# A (Non-Exhaustive) List of How CSMs Can Help

Course  
Evaluation

Advanced  
Reporting Blocks

Response Rates

Decision  
Tracking

Dashboard  
Strategy

Demographic  
Analysis

Instructor  
Performance

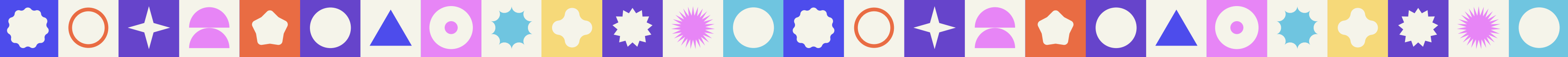
KPI Review

Closing the Loop

Midterm  
Feedback

Degree/Program  
Evaluation

Connect  
Learning Data to  
Business Results



Thank you  
[https://bit.ly/BNG2022\\_045](https://bit.ly/BNG2022_045)

