

Effective August 2, 2023  
**ThoughtExchange® Services**

ThoughtExchange is a hosted Software-as-a-Service platform. All access to ThoughtExchange by Leaders and Participants and other Authorized Users is online via most popular web browsers on standard desktop and mobile platforms (see <https://get.thoughtexchange.help/hc/en-us/articles/226950227-Supported-browsers-and-devices> for a list of supported platforms).

Please refer to your Service Order for details of the services & features you have purchased, including any applicable quantities or other limitations.

### **Services**

**Exchanges:** Online conversations with and among a specified group of people on an open-ended question. A Leader asks an open-ended question to Participants, who share their thoughts, one thought at a time, during the Share step. Participants then read other Participant thoughts and rate them on a scale of 1-5. Exchanges can include a certain number of Survey Questions to help filter and analyze data sets.

**Surveys:** Traditional surveys designed to collect quantitative data, with question types including likert scale, dropdown, comment box, and satisfaction score questions. A survey does not include an open-ended question as in an Exchange.

### **User Roles**

**Leaders:** Each Leader is an Authorized User whose account permissions allow them to create their own Exchanges, or Surveys, or both, and give them access to special ThoughtExchange features.

**Administrator:** Each Administrator is an Authorized User who can assign other Authorized Users permissions and manage Account level and/or Room level settings. An account admin has admin access across all rooms and the room admin has admin access for that specific room only.

**Contributors:** Each Contributor is an Authorized User who can be added to specific Exchanges or Surveys with account permissions allowing them to access and interpret the data from those Exchanges and/or Surveys.

**Participants:** Each Participant is an individual who is invited to participate in one or more Exchanges and/or Surveys.

### **Service Features**

**Access to Customer Success:** Ensures your Exchange Leaders get the training, support, and access to resources in order to run successful Exchanges.

**Access to Events and Resources:** Engage with your peers, learn from industry leaders, and identify new ideas to better engage with your community and organization.

**Administrative Controls:** Increased security controls to provide maximum protection. Adjust Room names, room level registration requirements (if available), domain limiting (if available), and add/remove Authorized Users and set Authorized Users permissions.

**Advisor (beta):** AI themes in core product is also affected by this feature (description)

**Analytics and Data Visualization:** You have access to various analytics and data visualizations that are automatically generated by the software.

**Compare Exchanges:** Track the impact your engagement and communication strategy is having on your organization by using our Exchange comparison dashboard. Choose two or more engagements and instantly produce a report that shows how engagement stats, summaries, survey responses and themes have changed over time.

**Customisable Branding:** Add your logo on your Exchanges, Surveys and Summary Reports. Branding will need to be applied by a Customer Success representative.

**Domain Limiting:** With Domain Limiting, only participants with email ending with the designated domain can join the exchange.

**Exchange Question Library:** A list of predefined questions under certain topics, designed to elicit quality feedback from Participants.

**Exchange Data Download:** Leaders can generate an excel file containing raw data from the exchange. The file Includes three spreadsheets containing:

**Exchange Data:** Every thought in the exchange, its average star rating, rank, moderation status, and a list of the themes that thought was included in.

**Participant Stats:** A count and percentage breakdown of responses to the Survey Questions (if any) you included in your exchange.

**Summary:** The date the exchange was launched, the date the exchange was closed, the status of the exchange, and a count of participants, thoughts and ratings.

**Expanded Analytics Suite, including:**

**Cross-Survey Analysis:** Ability to compare two of an engagement's survey questions in order to identify correlations between how they were answered.

**Favorability score:** Favorability scores sum up the percentage of participants that answered a Likert question favorably. It is used to quantify results, set and track goals, and simplify the task of comparing demographic groups.

**Satisfaction score:** Satisfaction scores calculate the difference between the percentage of satisfied and dissatisfied participants.

Group size table: This table neatly packages demographic group counts into a single view, thus simplifying the task of assessing participation, engagement and equitable representation of key demographic groups.

#### Integrations:

Calendar: The integrations create events in the user's calendars to remind them of Exchange launch and deadline dates. Helping leaders to track when Exchanges are closing and wrapping up from software they regularly work in such as Google and Outlook.

Participant Invitation: Allows Leaders to invite participation directly in specific channels or groups in software such as Microsoft Teams and Slack

Machine Moderation: Access to our machine moderation technology which can review thoughts before they are shared in the Exchange. This allows Leaders additional security and an opportunity to keep the Exchange a safe space. Machine moderation includes things such as rude or hurtful thoughts, identifying thoughts, identical thoughts shared by the same user, and can include Customer specific words or phrases. [Does not apply to stand alone surveys or comment box Survey Question types.]

Multilingual Participation: The ThoughtExchange user interface runs natively in either English, French, or Spanish. Exchanges can be created where Participants can participate in the same Exchange in any language that Google Translate supports.

Participation Groups: Create custom participation groups within a single exchange to keep participant thoughts and ratings contained and be able to compare trends between groups.

Product Support: These are available to you during regular working hours via phone, chat, and email.

Rooms: Rooms are virtual environments where Leaders launch Exchanges and Surveys. Leaders may be assigned to multiple Rooms. Exchanges and Surveys remain in the Room they are created in.

Single Sign-on (SSO): Integrated Single Sign-on enhances the Social SSO feature available in all Thoughtexchange Rooms with an integration with a corporate SSO server. SSO will require the support of ThoughtExchange and Customer IT teams, and cannot be configured by an Authorized User.

Survey branching: Survey question branching is useful when you want to send participants down different paths of your survey questions based on their responses to certain questions. Includes:

Drilldown: Drill down questions are useful when you want to ask a respondent to choose from a long list of options or if the questions and answers are nested together.

Survey Questions: Questions used to gather quantitative data. Can be included in Exchanges.

Templates: Customers can create templates for survey questions, participation groups, objectives and theme sets (both out of the box and custom). These templates can be used in exchanges within a specific room, or for all rooms within an account. Additionally, with the support of Customer Success, a Customer can access templated exchange design, allowing predefined questions tailored to the Customers use cases.

Workspaces: Workspaces are virtual environments that may contain one or more Rooms in cases where another layer is required to help differentiate a set of Rooms.