ThoughtExchange

Last Revised: September 27, 2024 (previous versions)

ThoughtExchange® Services

ThoughtExchange is a hosted Software-as-a-Service platform. Leaders and Participants can access ThoughtExchange 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 (collectively “Engagements”)

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. While a survey may include open-ended questions, they lack the sharing and rating of thoughts uniquely offered by Exchanges.

> Question types available: Single select, multi select, ranking, likert scale text, likert scale numbers, dropdown, comment box, satisfaction score, question matrix, deep dive.

Engagement Modes

Classic: An engagement mode which allows for Leaders to download engagement data without any reference to a specific participant.

Anonymous: As further described in our Subscription Terms, this is an engagement mode which allows Data Analysts to download engagement data that will show all responses from a specific participant but is not connected to any personally identifying information on each participant. This mode must be selected before sending out the engagement to participants and participants will see just-in-time messaging informing them of the engagement mode.

Confidential: As further described in our Subscription Terms, this is engagement mode which allows Data Analysts to download engagement data that will show all responses from a specific participant, along with any specific information that is requested from participants during the engagement or provided to the software during engagement creation (including Personally Identifying Information). This mode must be selected before sending out the engagement to participants and participants will see just-in-time messaging informing them of the engagement mode.

User Roles

Leaders: Each Leader is an Authorized User whose account permissions allow them to create their own Engagements and gives 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 Engagement results with account permissions allowing them to access and interpret the data from those Engagements.

Participants: Each Participant is an individual who is invited to participate in one or more Engagements.

Data Analyst: Assign this role to provide access for an Authorized User to download participant responses.

Service Features

Access to Customer Success: Ensures your Leaders get the training, support, and access to resources to run successful Engagements.

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.

AI Advisor: Advisor is our AI-powered tool to help users navigate and make sense of their results. With a chat interface, users can curiously dig into any data point in their engagement, apply filters to it all while getting contextual suggestions to help drive next steps.

AI Article: Article will summarize engagement data into useful out-of-the-box insights that are easily digestible for Leaders. Depending on the engagement type, we will show the following types of summary cards: high-level summary, ratings high v. low, categories (global: up to 5 / granular: up to 15), Common ground & Differences, and Talking points.

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

Contact Box: This field allows you to securely gather your participants' contact information for things such as incentives, volunteer recruitment or additional questioning. Participant input in this field is not linked to their other responses. This is accessed via the Settings menu and not listed in the regular question type menu.

Customisable Branding: Add your logo on your Engagements 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 your Engagements.

Engagement Templates: Prebuilt templates, as available for each Engagement type, to help simplify the process of building an Engagement. Templates may be designed by us or other organisations. Template options and functionality varies based on the package you have purchased.

Engagement Data Download: Leaders can generate an excel file containing raw data from an Engagement. The file includes three spreadsheets containing:

> Participant Stats: A count and percentage breakdown of responses to the Survey Questions (if any) you included in your Engagement.
>
> Summary: The date the Engagement was launched, the date the Engagement was closed, the status of the Engagement, and a count of participants, thoughts and ratings.
>
> Participant Responses: All responses within an Engagement. Flexible data privacy settings (see Engagement Modes above) provide an option to collect more granular engagement data. Requires data analyst role and must select Anonymous or Confidential engagement mode prior to launching the Engagement.

Expanded Survey Question Comparison, including:

Compare Favorability scores: Favorability scores sum up the percentage of participants that answered a Likert question favorably. It is used to quantify results, set and track goals. Our favorability matrix allows you to compare multiple question or topics' favorability scores across a range of demographic groups.

Compare Satisfaction scores: Satisfaction scores calculate the difference between the percentage of satisfied and dissatisfied participants. Our satisfaction score comparison graph allows you to compare scores across a range of demographic groups.

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.

Filter results by imported Demographic Data: Augment the ability to analyze results and reduce survey length by integrating known participant demographic data points.

Compare survey questions across multiple engagements: configure and compare results from multiple survey engagements in a single view, providing a comprehensive matrix for analysis.

Integrations:

Calendar: The integrations create events in the user's calendars to remind them of Engagement launch and deadline dates. Helping leaders to track when Engagements 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 open text Survey Question types (e.g. comment box, deep dive).]*

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

Participation Groups: Create custom participation groups within a single Engagement 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 Engagements. Leaders may be assigned to multiple Rooms. Engagements 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: Drilldown questions are useful when you want to ask a participant to see a specific series of survey questions and/or only specific answers to those questions, based on how they answered previous questions.

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

Survey Topics: Provide context for survey questions (both for participants and results analysts) by grouping them into related categories.

Templates: Customers can create and save their own templates for survey questions, participation groups, objectives and theme sets (both out of the box and custom), which can be used within a specific room, or for all rooms within their account.

Unique Participation Link and Code Access: Avoid duplicate or unwanted submissions by sending out unique links to your intended participants, or by requiring a unique coder per participant. Upload your intended audience's contact information to our system and we'll send them a custom email with a link, or require a code, specifically for them.

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.