

Guidance on Setting your Pulse profile and sending your first review via Pulse.

Below you will find a step-by-step guidance on setting up your profile as well as sending your first content via Pulse. This guidance will include platform screenshots as well as short videos to assist with certain feature navigation on the platform.

In addition, as part of our training resources, we're excited to offer Storylane - an interactive demo platform designed to enhance your Pulse learning experience. We encourage you to check out this Storylane demo, where you can navigate through Pulse functionalities at your own pace. Please follow this link: <https://clientshare-tour.storylane.io/share/xzcrr4dh5gp0>

Step 1 – Set up your Pulse Profile

1. You should have received your registration email from Clientshare Pulse – if you have not seen this come through, check your junk mail first and then contact Clientshare team to be assisted.
2. Click on the Clientshare Pulse link in the email, select a password and then log into the Pulse platform.
3. Action the below points by navigating to the circle with your initials in the top right-hand corner of the screen and selecting 'Profile' from the drop-down list.
 - On the Details tab:
 - Check your name and job title, and edit if incorrect
 - Upload a photo
 - Select 'Save changes'
 - On the Notifications tab:
 - From the drop-down list make sure 'Select all' is selected
 - Select all notification boxes, so that when your customers provide feedback, you will be notified via email (see image below)
 - Select 'Save changes'
 - You can also watch a bitesize video on setting notifications up [Here](#)

My profile ×

Details Security **Notifications**

Select which licences to receive notifications for

All selected ▾

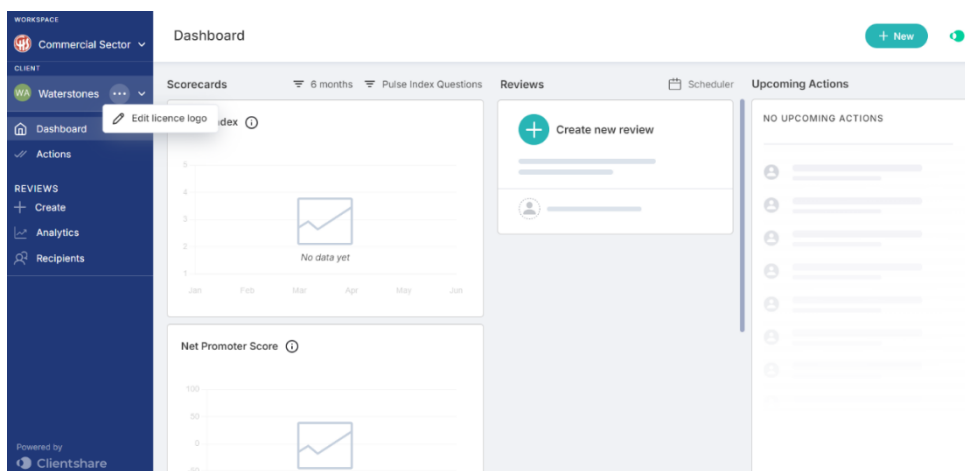
Send me an email when:

- Feedback is submitted by a recipient
- Follow up request is submitted by a recipient
- Review is opened by a recipient for the first time
- Rating and NPS is submitted by a recipient
- Pulse Index score submitted is 3 or lower

Cancel Save changes

Step 2 – Cross-check your customer allocation

- On your dashboard:
 - Check that your customers have been assigned to you and that they have the correct logos displayed.
 - If any customers are missing or incorrectly assigned, let Clientshare team know, and this will be edited for you.
 - If the logo is missing or is incorrect, navigate to the customer's name on the left-hand side of the screen, hover over the customer's name and click on the three dots to edit the logo (see image below):



Step 3 - Adding Recipients

In preparation for sending a review on Pulse, we recommend uploading your customer contact details in advance.

- Navigate to the customer you want to add recipients to by selecting them on the left-hand bar.
- Select the 'Recipients' tab on the left-hand side of your dashboard and start to add your customer details - [here](#) is a video that runs through this step.

You can add as many customer recipients as you would like to each customer, and we would recommend you add a minimum of 3 where possible to maximise the opportunity of receiving feedback.

Step 4 – Communicate with your customer

To make sure that Pulse is positioned well with your customer, we recommend that you contact them in advance of sending out your first content on Pulse and let them know to look out for an email from info@myclientshare.com. You have 'Introduction to Pulse PDF' that may be useful in supporting your conversations or if you are having a business review meeting you can also use 'Pulse for Customer' slides to support when sharing this information.

Step 5 – Creating your first Pulse Review

You have two options of content to send as your first content via Pulse:

- 1) **Introduction to Pulse:** If you don't have a business review meeting happening the week you're looking send your first content via Pulse, please send the attached 'Introduction to Pulse' pdf document as content for your first review and follow 'Option 1' in the instructions below.
- 2) **Business Review Presentation:** If you have a business review meeting happening the week you're looking send your first content via Pulse, please share your business review content with your customer via Pulse and follow 'Option 2' in the instructions below.


Open Pulse, navigate to the customer you'd like to send Pulse to (select from the left hand-side panel by clicking on 'All clients' tab) and then navigate to the '+Create new review' option on the right-hand side of the dashboard, under 'Reviews' column and complete the 7 steps by using the instructions in the table below. You can of course tailor the introduction to your customer.

To recap how to send content on Pulse, you can also watch a bitesize video [Here](#) (please note that whilst the video makes reference to sending a QBR, if you don't have a business review meeting over the next few weeks, you will be sending an 'Introduction to Pulse' document).

Video

For this first review you are welcome to use the video that Campbell Murdoch has recorded. Simply click on this link: [ABM video - Campbell Murdoch.mp4](#) and save this video locally and upload to Pulse when you are preparing to issue your review.

Review Name:	Select either: Option 1: Introduction to Pulse, or Option 2: The name of your business review e.g. Q3 Quarterly Business Review Oct 2024
Review type	Select either: Option 1: 'No meeting has happened' Option 2: 'The meeting has happened'
Date	Select Option 1: today's date, or Option 2: The date your review meeting happened
Example Introduction Message Please note there is no need to add a greeting	At ABM, we are constantly looking at ways of improving our services and enhancing our partnership with you. To support this, we have partnered with Clientshare, who provide an industry leading Business Review tool called Pulse.

<p>as this is included in the tool</p>	<p>Going forwards, ABM will use Pulse to share Business Review presentations and request feedback from you on the service we provide.</p> <p>Over the next few pages, you will find further information about Pulse for you to download and review.</p> <p>To the right of this message there is a video we invite you to watch from Campbell Murdoch, MD Business & Industry UK, requesting you to provide feedback on our recent performance.</p> <p>Once you have provided feedback, we will plant a tree for you.</p> <p>Thank you.</p>
<p>Introduction video</p>	<p>Attach intro video message from Campbell Murdoch:  ABM video - Campbell Murdoch.mp4</p>
<p>Content</p>	<p>Include:</p> <p>Option 1: 'Introduction to Pulse' document (document attached to this email) or</p> <p>Option 2: Your business review presentation and any other review collateral you wish to share with your customer</p>
<p>Recipients</p>	<p>Add all relevant client recipients for your account</p>
<p>Actions</p>	<p>Add actions (not mandatory)</p>

Step 6 - Receiving feedback

When your stakeholders provide feedback, this will start appearing on your Pulse dashboard – if you have turned your notifications on under your profile, you will also receive an email when your customer engages with the tool, either when they open the review to read it, or start to provide scores and feedback, or if they request to speak to leadership. Nicolas and Victoria and the Account Directors will have visibility of customer feedback and requests so you can discuss how best to follow up.

Additional bitesize videos providing guidance on the Pulse dashboard can be found here:

[Navigating the Clientshare Pulse dashboard](#)

[Analysing feedback on Clientshare Pulse](#)