



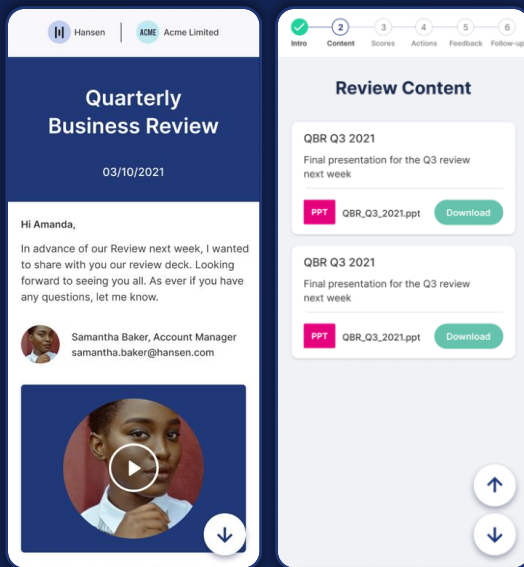
Customer Slides

What is Pulse?

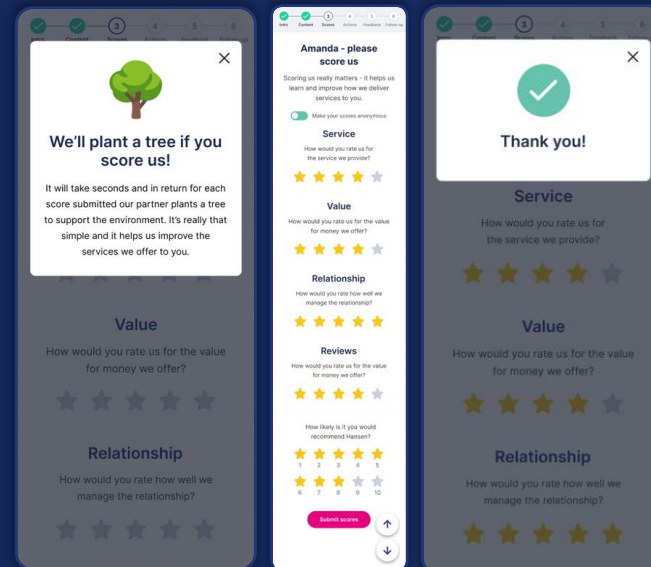


Pulse is the workflow tool used to deliver consistent, standardised Business Reviews for its customers. Pulse gives you, our customer, the opportunity to give us regular and direct feedback and gathers that data into dashboards to show us, on an ongoing basis, how well we are servicing our partnership with you.

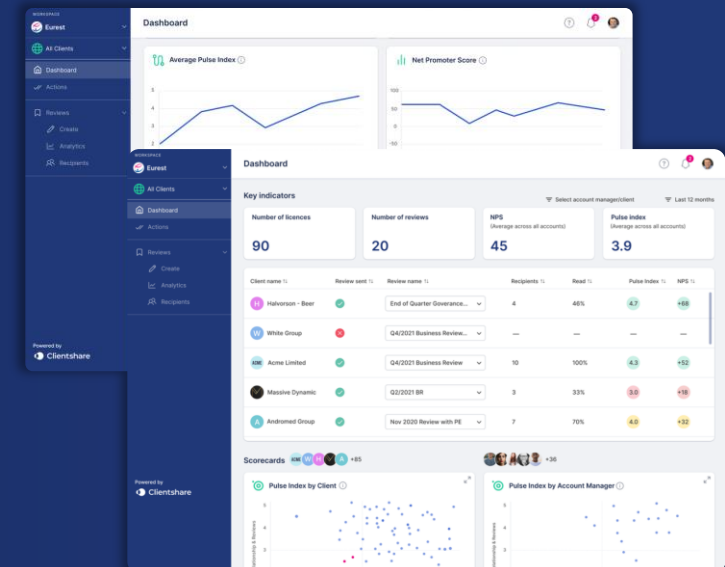
1. Receive consistent and high-quality reviews



2. Allows you to score us and deliver instant feedback



3. Allows us to identify and optimise areas for improvement

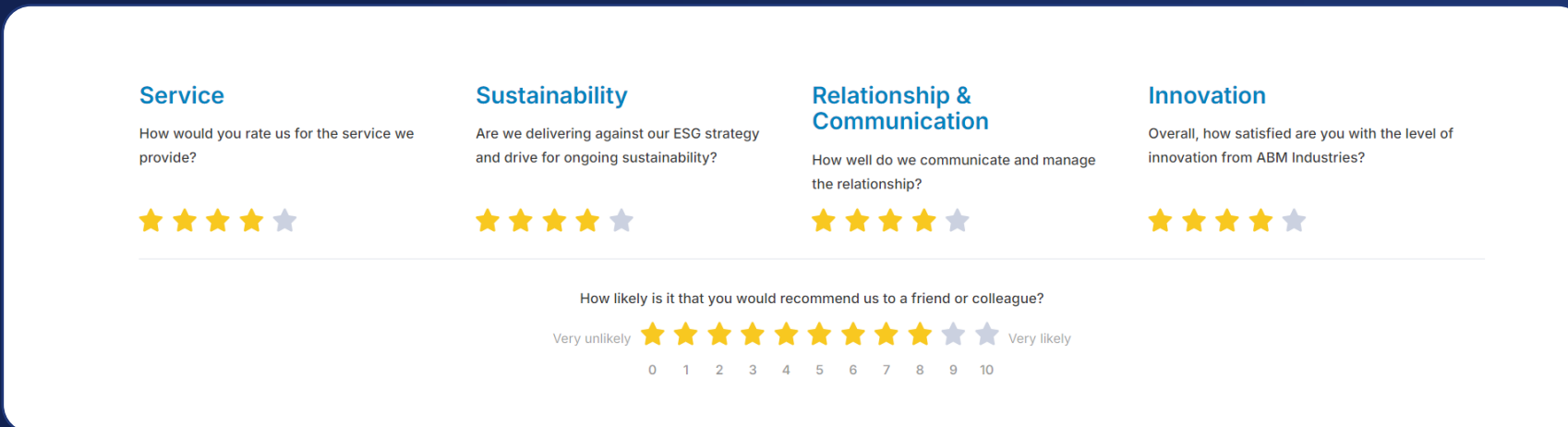


CLIENTSHARE PULSE

Clientshare Pulse is a workflow tool that:

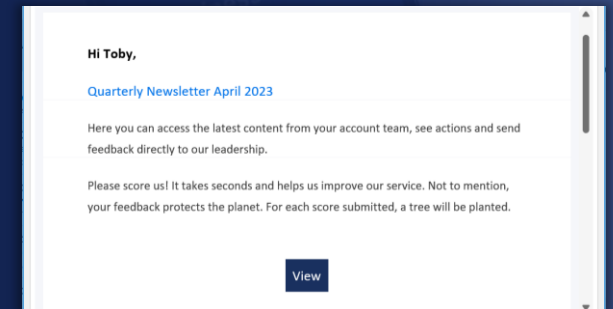
- ✓ Enables us to quickly and securely share our review collateral and documented meeting actions with you
- ✓ Allows you to easily score and deliver immediate feedback to us
- ✓ Enables you to request a direct call from our Senior Leadership team

WHAT WILL YOU SCORE ?

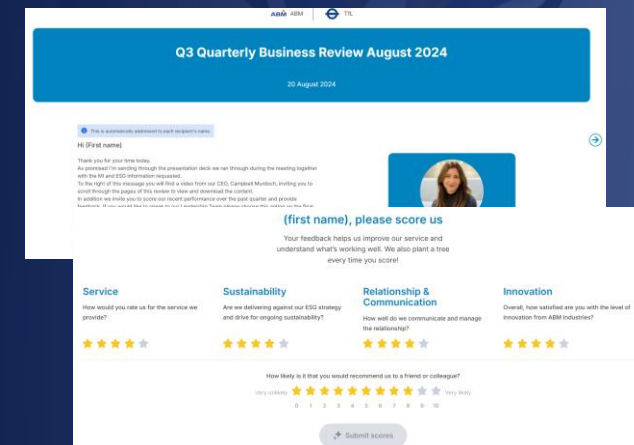


What to expect next?

1. You will receive an **email** from info@myclientshare.com which will include all collateral from our business reviews



2. Please then review content and provide **scores & feedback**



NPS



Net Promoter Score (NPS) is a metric used to measure customer satisfaction and loyalty. Pulse enables businesses to regularly measure NPS across all accounts by inviting customers to answer the question:

'How likely is it you would recommend us to a friend or colleague.'

- Customers are invited to provide a NPS rating between 0-10
- Scores from 0-6 are classified as **Detractors** / 7-8 are **Passives** / 9-10 are **Promoters**



A Net Promoter Score is the percentage of customers who are **Promoters** minus the percentage who are **Detractors**.
$$\text{NPS} = \% \text{ of Promoters} - \% \text{ of Detractors}$$

For example, if 50% of your respondents are **Promoters**, 10% are **Detractors**, and 40% are **Passives**, your NPS would be

$$50 - 10 = 40$$

Individual NPS ratings from each customer provide an overall NPS rating and appear on the Leadership dashboard

Ecologi Partnership



Clientshare plant a tree for any customer feedback provided on Pulse. Clientshare do this via their partnership with Ecologi.

Periodically Clientshare adds up the number times customers have provided feedback and donates the equivalent number of trees via Ecologi. Clientshare provides an update on the number of reviews sent and trees planted so the progress can be tracked over time.

Ecologi plant trees on behalf of Clientshare in a variety of locations across the globe including Kenya, Ethiopia, Uganda, Madagascar and the UK.

If you click on the Tree Planting link you can select different trees that show you exactly where they are planted and under which project.

- 1. Tree planting:** <https://ecologi.com/clientshare?tileId=61d4de9ba1a8ccece99c044c>
- 2. Tree Maintenance:** <https://ecologi.com/articles/blog/get-to-know-our-reforestation-partners>

290 trees funded Close X
Funded by: Clientshare
Date funded: 3 June 2024
Species: Yushania alpina
Tree numbers: 81,906,429 → 81,906,718
Location: Kenya
Project: Mau Region

240 trees funded Close X
Funded by: Clientshare
Date funded: 30 April 2024
Species: Acacia polyacantha
Tree numbers: 81,064,458 → 81,064,697
Location: Uganda
Project: Mbale

250 trees funded Close X
Funded by: Clientshare
Date funded: 7 December 2023
Species: Sesbania sesban
Tree numbers: 76,769,689 → 76,769,938
Location: Ethiopia
Project: Jabi-Tehnan

Your contribution helps fund all the projects within our global reforestation mix. This tile represents trees in one of these projects. [Learn more](#)

Share

June 2024

How to whitelist email domains



Step 1

Ask that the following Clientshare domain information is shared with your customer's IT Team so it can be added to the company whitelist:

Email domain

@myclientshare

Website domain for Clientshare Pulse

pulse.myclientshare.com

Useful links

[How to create a Microsoft 365 Whitelist](#)

[How to configure spam filter policies](#)

[How to create a Whitelist on G-suite](#)

Step 2

When your customer's IT team have confirmed the whitelist is ready and the domain have been added, advise your Account Manager they can send reviews using Clientshare safe in the knowledge all emails are being received.

What is whitelisting?

Whitelisting is a cybersecurity measure where users can only receive emails from website and domains that have been added to a whitelist and approved by the IT administrator in advance.

Sometimes essential software or communication can be blocked because they haven't yet been added to the whitelist, so it is good to keep this in mind when starting to use new technology.

If Clientshare hasn't been added to your company's whitelists, the reviews may not be received and will head to spam / junk folders.

