Forsta

December

Product Release

Customer Success

January 23, 2024

Happy New Year!

To wrap up 2024, in December we added more enhancements to our HX Platform including:

- Support for short URL generation for unsubscribe links in **Survey Designer**
- Improved functionality for **CATI Supervisors**
- New functionality in **Studio Crosstabs**
- Several updates to our **Discussions** platform
- SMS capabilities on **Panel Management**
- Feature updates for **Forsta Visualizations**

Keep reading to learn about these improvements!

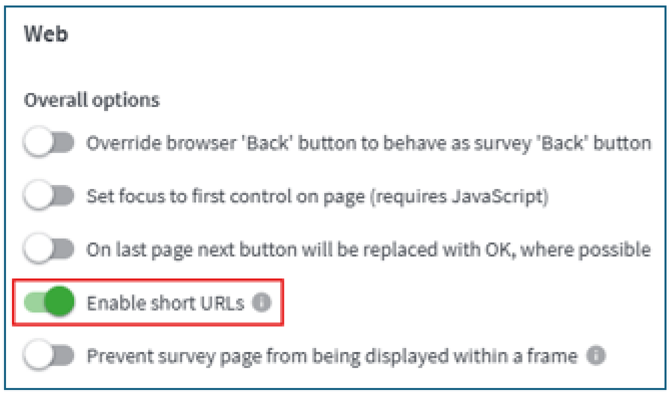
You can also now review previous months' product updates at any time via the knowledge base!

https://pgforstaproductupdates.zendesk.com/hc/en-us/p/ProductUpdates

Forsta Plus

Survey Designer

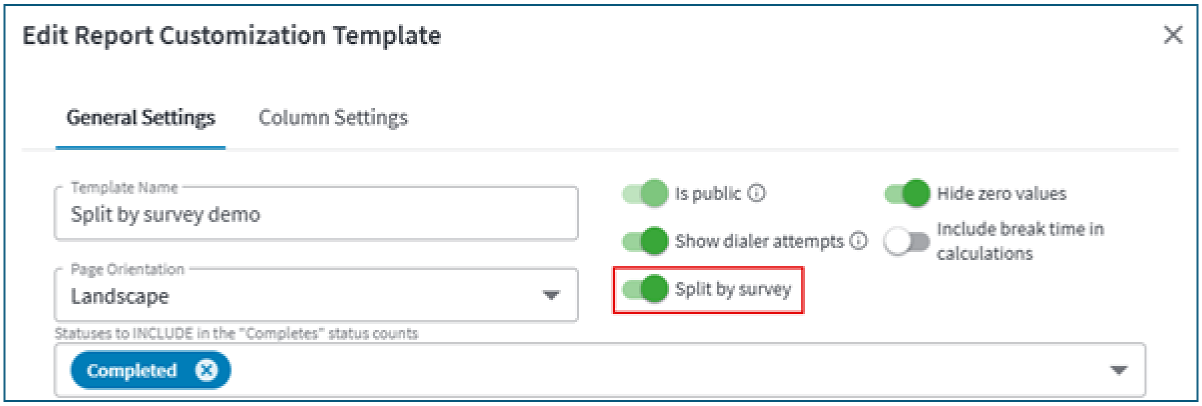
1. **Short URL for unsubscribe links**
   For companies with Short URL feature add-on enabled it is now possible to have Short URLs provided for unsubscribe links (in addition to survey links). Short URLs for unsubscribe links will automatically be enabled when the survey setting is turned on:



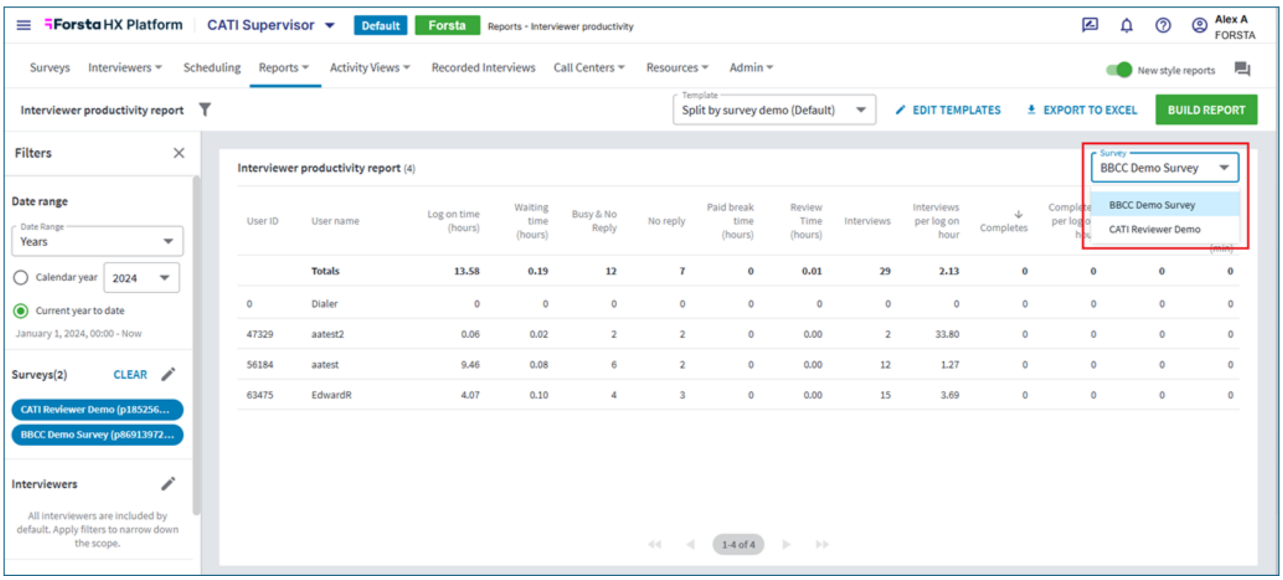
Value: This feature is helpful for surveys using SMS invitations in order to reduce the overall length (and cost) of the SMS message. Without the Short URL feature the length of an unsubscribe link could easily be more than 300 characters (approx. twice the limit for a standard SMS message, leading to messages having to be split and sent in more segments). With the short URL setting enabled the total length of the link is reduced to approx. 30 characters depending on the length of the site domain name, a roughly 10x length reduction.

CATI Supervisor

1. **'Split by survey' setting for Interviewer Productivity reports**
   We have introduced a new capability in the Interviewer Productivity report which allows it to be split by survey. This means that when you build the report against multiple surveys, instead of producing one table where all the figures across the surveys are aggregated together you will receive a separate table per survey. A new drop-down list makes it easy to toggle between the various survey report tables. If you export the report to Excel each survey will be reported in a separate worksheet.
2. To make use of this new feature you should first **create or modify an existing report template**. In the general settings tab enable the new **'Split by survey'** setting.

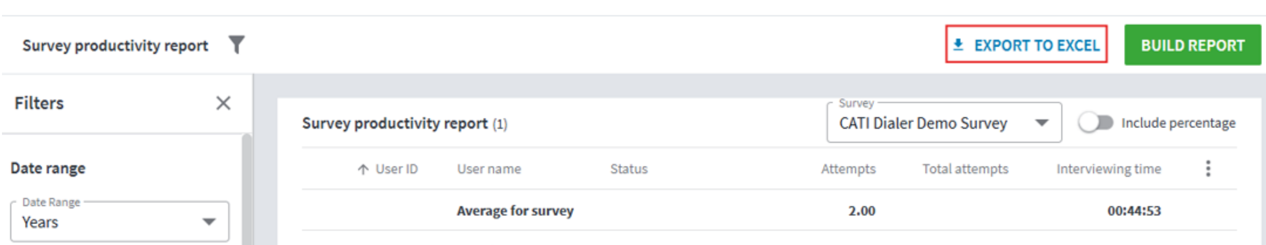


When the report is built there is a drop-down selector to pick the survey you want to see the results of:



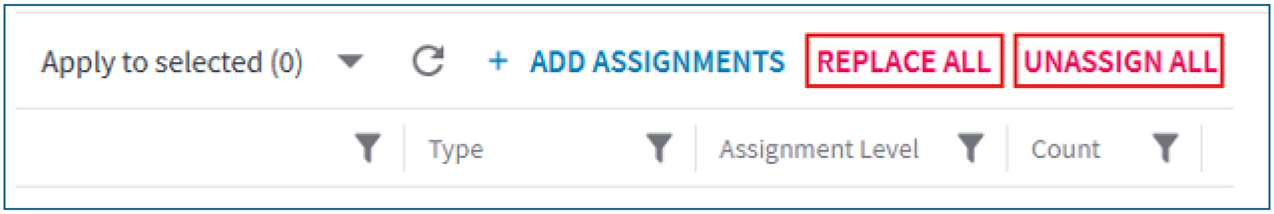
3. Excel export for the Survey Productivity report

The new style version of the Survey Productivity report now provides an Export to Excel option, which allows for modifications or sharing with other users. Note the Survey drop-down list automatically filters to only include surveys which have data to report on for the chosen date range:



3. Replace All and Unassign All interviewer assignment options

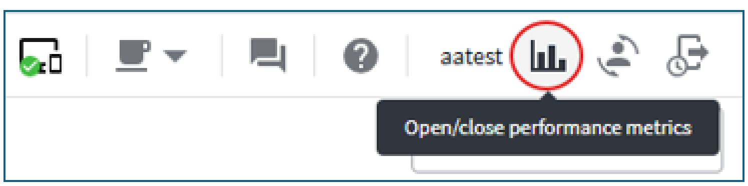
The new UI for managing interviewer assignments for a survey has been improved to provide 'Replace all' and 'Unassign all' options. The replace all option can be used as a quick way to remove all existing assignments to a survey whilst also adding new assignments.
The new assignments UI is also now applied for assignment operations performed using the 'Add assignments' context menu option from the surveys list.

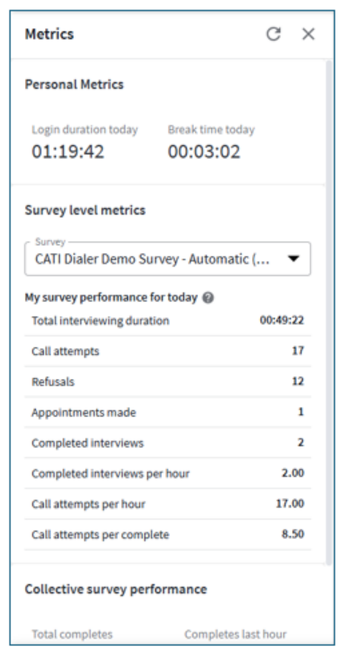


CATI

1. Interviewer performance statistics

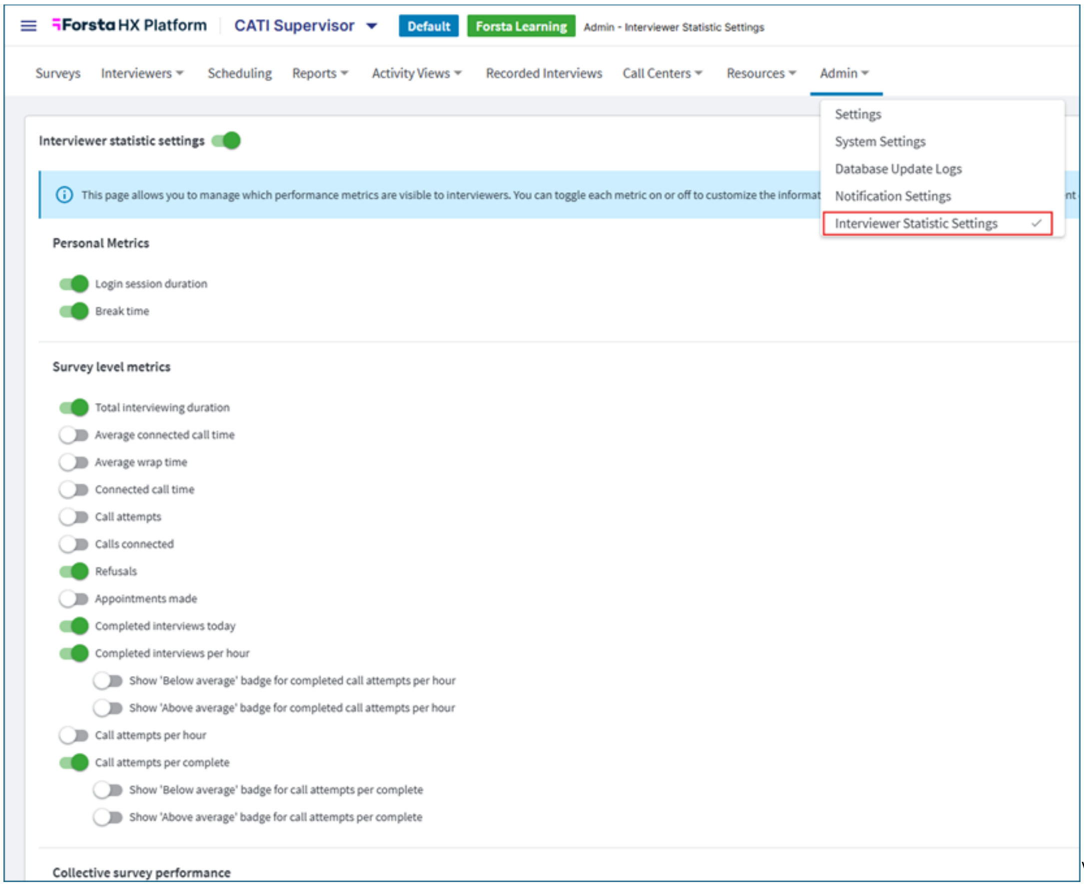
Interviewers are now able to open a panel containing a summary of their current performance metrics displaying things like their completions, appointments, refusals and strike rate. Interviewers can also track their own performance against the survey level average.





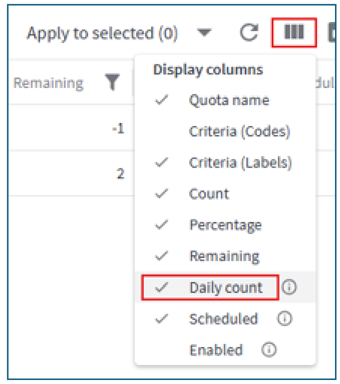
Value: Seeing metrics like completed interviews, call success rates and average call duration helps interviewers understand their performance relative to team goals or individual targets. When interviewers track their progress, they feel more responsible for their outcomes, fostering a proactive attitude toward meeting or exceeding expectations.

Configuration: Support for interviewer performance metrics is enabled for some statistics by default. We highly recommend looking at enabling additional metrics that could be useful. Any CATI admin user can adjust the functionality using the company-wide settings, with options to enable or disable each individual metric in the list of supported metrics. The functionality in its entirety can also be enabled or disabled at the company level should you prefer to leave it off. Users with the CATI Admin permission can adjust the settings via the Admin/Interviewer Statistic Settings menu in the CATI Supervisor UI.



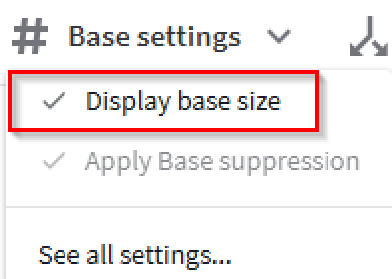
2. Daily achieved quota counts

To close one of the last remaining gaps in the new style quota management UI, we've extended the column selector to include the option to choose a column which provides the daily achieved quota counts. This makes it easy for supervisors to keep track of the quota progression.



3. Date stamps and comments for blacklisted numbers

The telephone number blacklist (do not call list) has been extended to include two additional fields for 'Timestamp' and 'Comments'. The Timestamp field is automatically added by the system when the entry in the list is added. The Comments field allows users to enter an optional comment against a number when adding it to the blacklist. When the entry to the blacklist is made via the survey script function or the CATI API the comments field will automatically be populated with helpful information such as the source survey ID or user from which the entry was created.



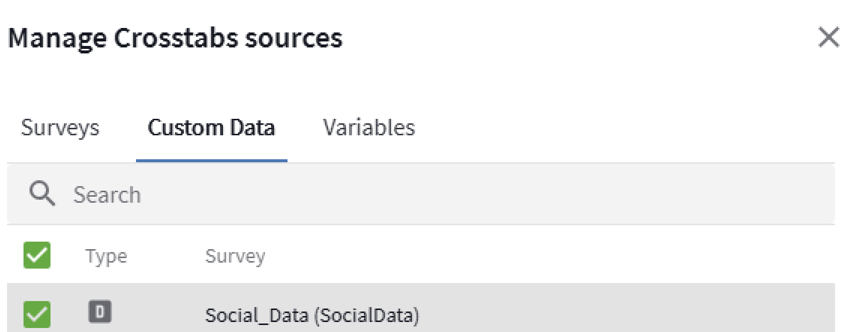
Studio Crosstabs

1. Ability to add Base Size to tables

Users can now choose to add base info to their tabs!

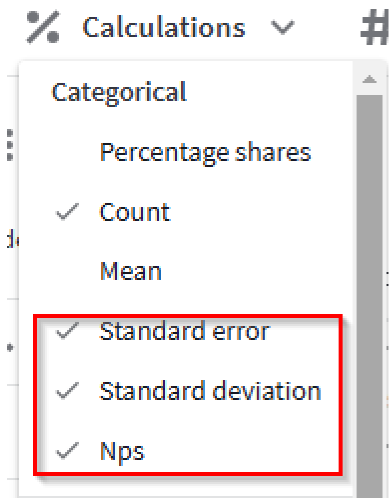
2. Support for Custom Data

Crosstabs can now be run on Custom Data Tables from Hub. Previously, only survey data could be used.



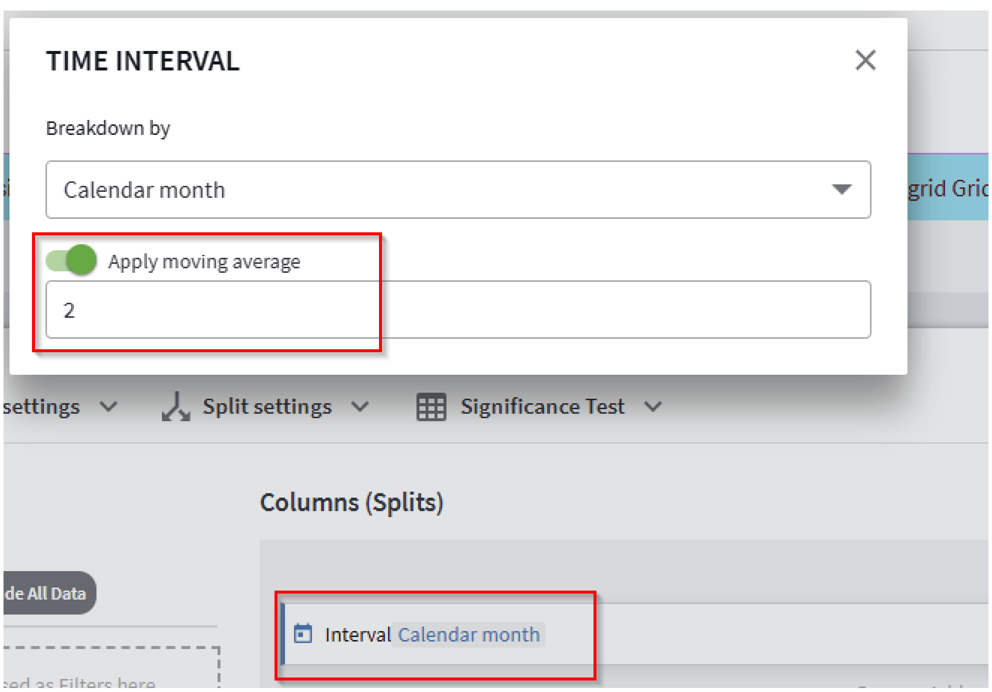
3. NPS Score, Standard Deviation and Standard Error calculations now added

More options for calculations added to the UI



4. Support for Moving/Rolling Average

A much-requested feature! When adding "interval" as a split, you can now choose to add a moving/rolling average. Simply select Calendar quarter/month/week/date and then choose the number of previous periods to include. (Updated UI coming shortly to provide more clarity on what has been selected, when tabs are generated)

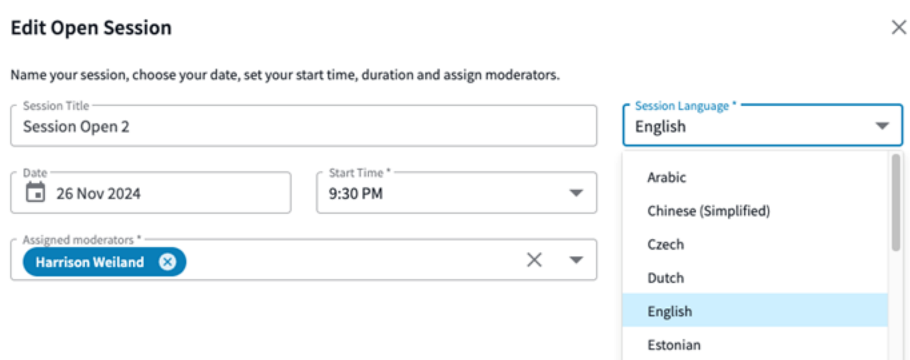


Value: Adding more functionality and calculations enabling end users to run more complex analysis. Closing the gap to Forsta Viz Crosstabs, enabling us to bring Studio customers back to Studio for Native Crosstab use. Enabling end users to slice and dice custom data, in addition to survey data.

Discussions

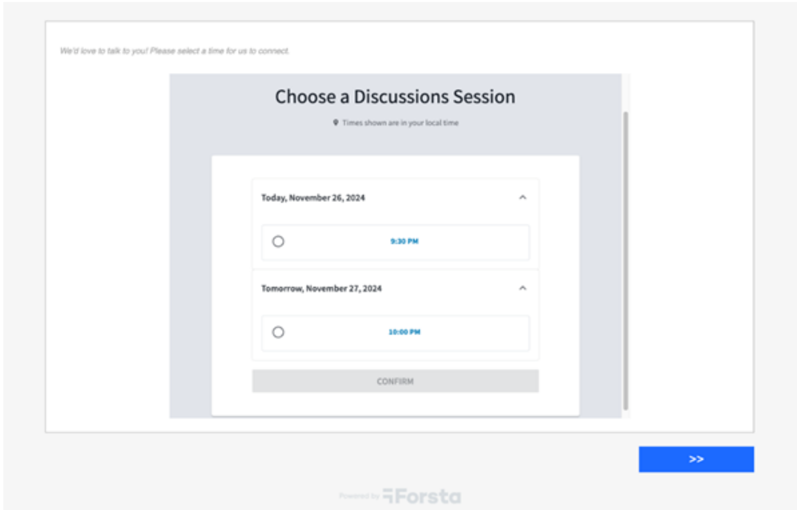
1. **Participant Localized Interface**
   Discussions now supports a multilingual interface! Discussions participant enrollment session selection as well as the live session interface now support a variety of languages. The language is determined by the user's browser language, avoiding the need for configuration. A handful of languages are supported at launch, including but not limited to French, Spanish, German, Portuguese, Italian and Dutch.

2. In addition, **participant emails** now also support a variety of languages as well. Email language can be changed using the Session Language dropdown when creating or editing a session.

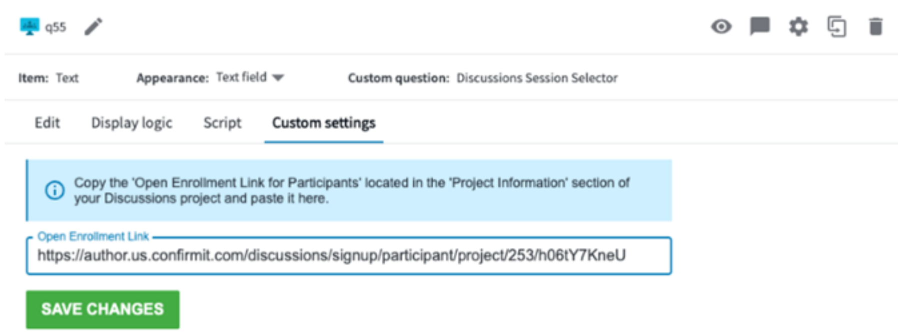


3. **Participant Multiple Session Support**
   Discussions now supports a participant (respondent) registered in a project to participate in recurring subsequent sessions. This will be especially useful for recurring meeting types, such as PFACs. *Of note, participants can only be assigned to subsequent sessions after the previous session has concluded or the scheduled time of that session has elapsed.*

4. **Discussion Session Selection Integration in Forsta Plus**
   Forsta Plus now allows your survey respondents to select a Discussions session to take part in from within a survey. This means you can programmatically choose to Invite participants to choose from Open Sessions (pre-defined session times) and enroll while taking a survey.



You only need to select the question type and paste your Open Enrollment Link into the question configuration to get started!



Panel Management

1. Sending invitations via text message is now available via our new **SMS Integration** with MessageMedia!

   MessageMedia is a messaging platform that provides services enabling organizations to communicate effectively with their customers, clients, or employees via SMS and other messaging solutions.

Learn more on our Knowledge Base: Setting up SMS

2. High resolution images are now supported for Responsive Template Banners

Forsta Visualizations

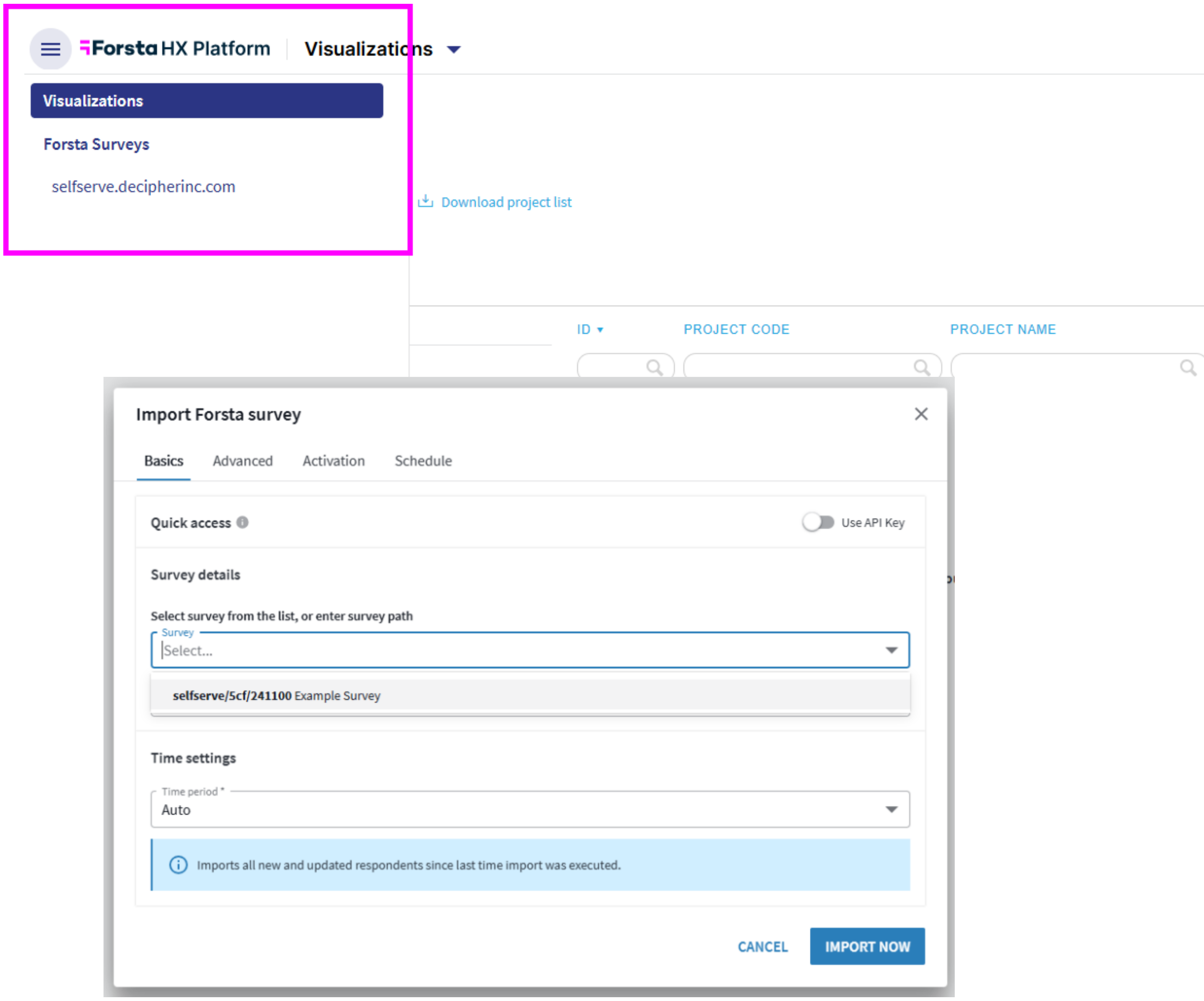
1. Quick link and connection between Forsta Viz and Forsta Surveys (Decipher)

— To make the connection between Forsta Visualizations and Forsta Surveys (Decipher) much easier, we have created a "quick switch" between the systems, meaning you only have to login to one system, and once logged in, you can jump directly into the other system with a click of a button.

— With this we have also included our data transfer solution. This means that if you have the option to jump between the systems with a click of a button, you do not need to add the URL and API Key in your import tasks. This task will now be done with your user directly. The only thing you need to choose is what survey you want to import data from.

— This option will only be available for customers who have active accounts within both systems that are identical. *Other customer features may be required.

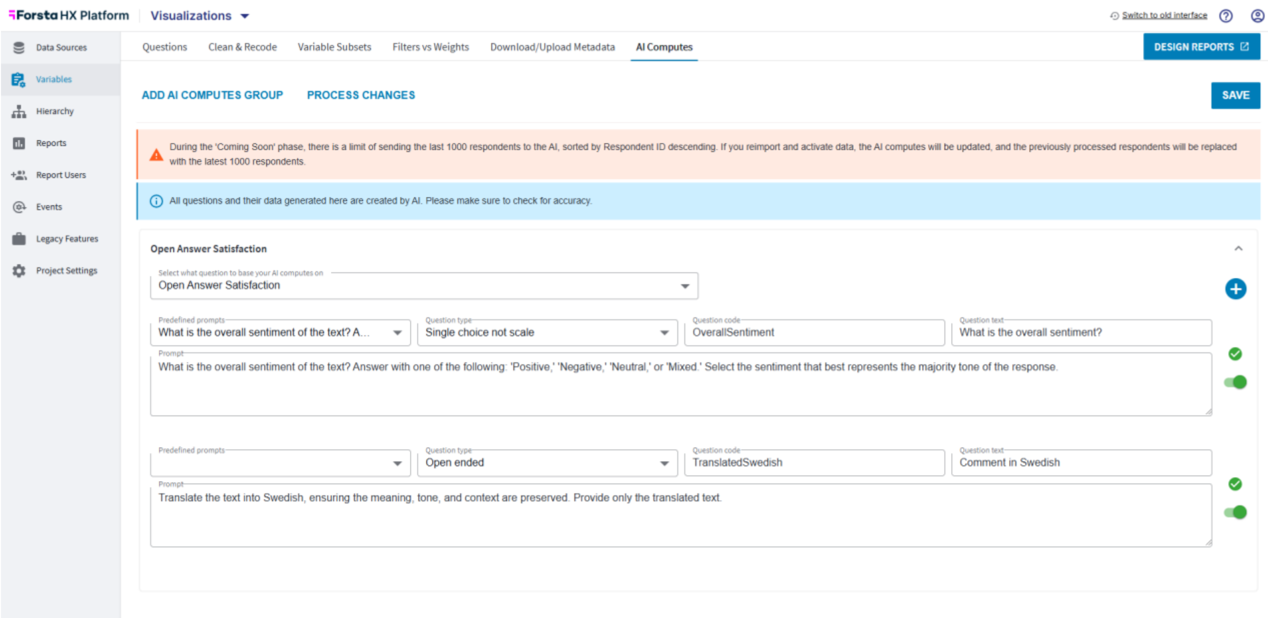
— If you are interested in enable this option for your admin users, please contact your Customer Success Manager or your Account Director.

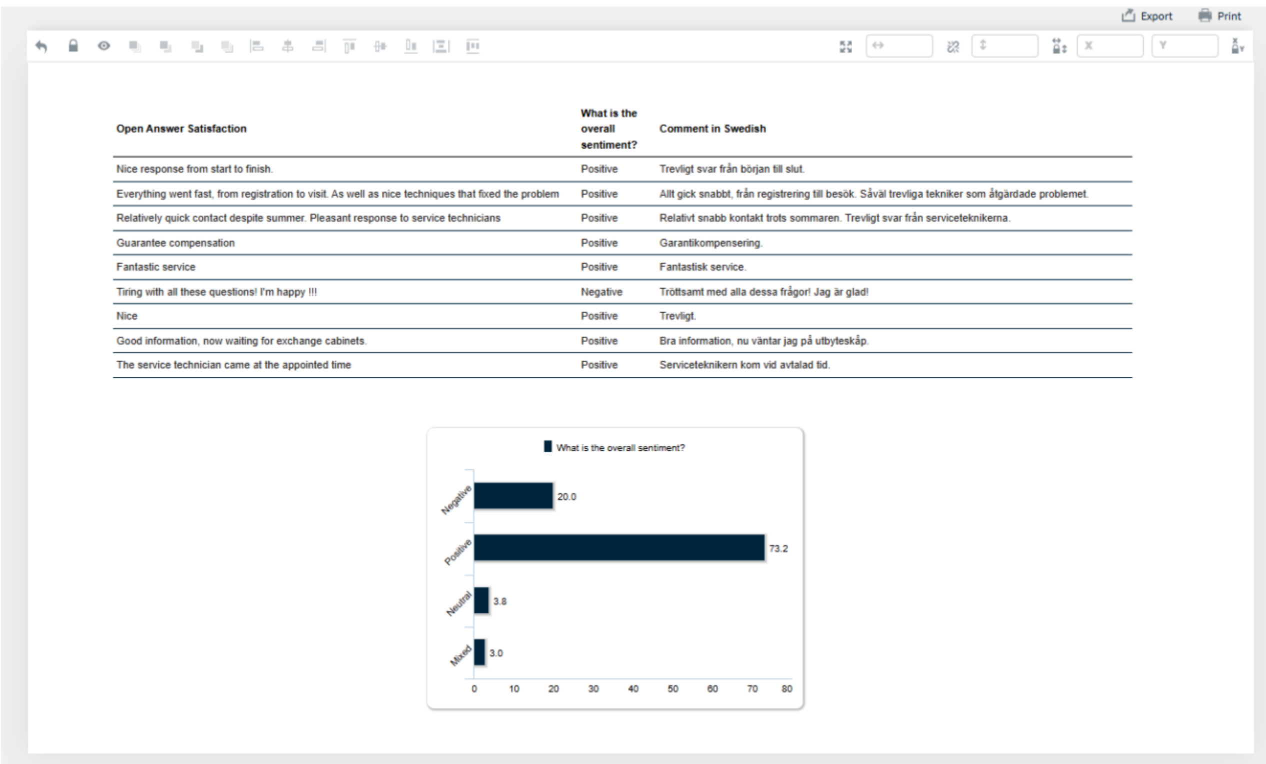


2. AI Computes

— Let us introduce AI Computes! Extracting information form your open ended questions has never been easier! You select what open question you want to use, you write your own prompt with information on what you want to get, and within each activation of data, the information will be sent to our AI to process the request, so it behaves in the same way as our regular computes.

— This is a "Coming soon" feature, meaning it won't be enabled by default for everyone, but we want to have customers testing this! If you are interested in testing this, please contact your Customer Success Manager or Account Director.





3. AI Summary

— We have updated and expanded the functionalities of our Summary object making it easier and quicker to create your own report. It is now possible to save slides with a Summary object to both data templates and AutoGenerate template sets to make the process of creating reporting decks faster. Since Summary objects currently can only be used with one question selected, slides with a Summary object will always have a condition where the number of questions is equal to one when they are saved to AutoGenerate template sets.

— We have also added a translation option for all object-specific texts within the Summary object, such as headers and disclaimer text. These can be found within the "language file" and available if selected in the UI.

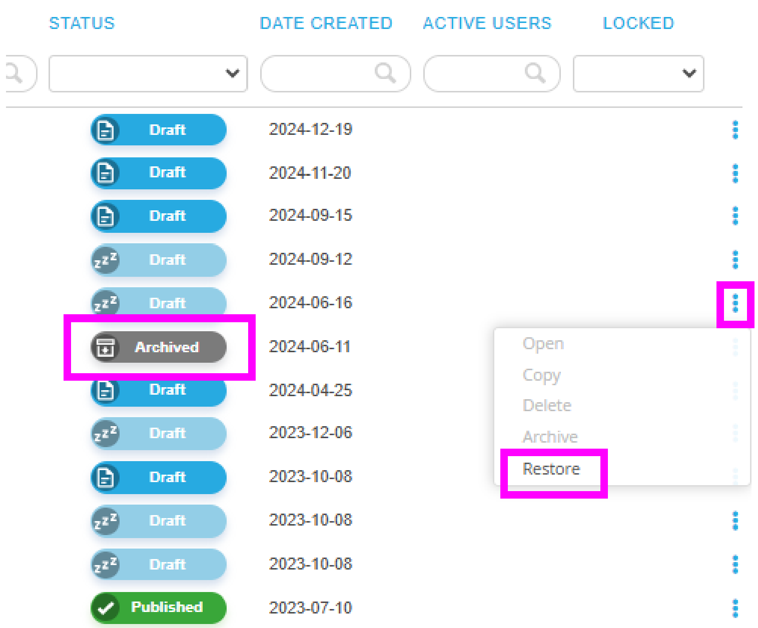
4. Bulk edit of predefined table layout (CT)

We have introduced the option to bulk edit our predefined table layout in the CrossTable tool, allowing for efficient updates to workbooks. This feature significantly reduces the time and effort required to manage multiple sheets.

5. Project administration

— **Improved visualizations of Looped data in reporting**: To facilitate proper reporting setup when looped data is imported, we have enabled a setting where the iterators are automatically shown and selectable for data objects. This makes it easier for users to apply the correct filters/splits.

— **Project sleep and restoring archived projects**: We have introduced some automatic housekeeping rules for projects. The rule puts the project into sleep mode after inactivity. Projects in sleep mode will be awaken as soon as any activity is detected, such as user or admin access or a scheduled import. Once the project is woken, the system will automatically update all necessary settings.



— **Data page**: Our Data page is now accessible during scheduled data import and activation to track progress through logs.