



Partner CAB Meeting Report
Q2 2022

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Attendees

CSG Forte CAB Contributors

Brittney Carlisle – VP, Payment Operations CAB Executive Sponsor

Jeanette Mbungu – Executive Director Strategic Business CAB Executive Sponsor.

Lurina Dallas – Sr. Customer Intelligence Analyst CAB Meeting Facilitator.

Carolina Pulgarin – Customer Intelligence Analyst, CAB Meeting Facilitator.

Hannah Denman – Customer Success Analyst, CAB Meeting Scribe.

Kei Gilyard – Customer Success Analyst, CAB Meeting Scribe

Alexandra Brittany Russell – Customer Success Analyst, CAB Meeting Scribe.

CSG Forte CAB Key Speakers

Jeff Kump – CSG Forte President.

Hunter Menton – Client Business Executive III.

Lauren Harshaw – Director, Marketing Strategy.

Sukanya Madhavan – VP, Product Management.

Charu Krishnan – Director, Product Management.

Jim Walker – Director, Risk Management.

Glenda Johnson – Director, Service Desk.

Partner CAB Members

Alison Schmidt – CampBrain Manager, Client Support

Gene Krause – Agile Payments, VP, Business Development

Matt Valego – Infintech, Vice President

Taylor McCully – CivicPlus, Strategic Client Partner

Eric Panter – CivicPlus, Technical Integration Specialist

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Sujal Dhakal – Online Insight, Software Engineer III

Gregory Scott – Online Insight, Chief Technology Officer

Julie Lichty – Bold Group, SVP, Product Management

Mohsin Bhally – Deentek Solutions Owner

Peter Rogati – Systems East, Inc., Director of Operations.

Chang Kim – Harris Government, VP, Sales & Marketing

Meeting Details

- Tuesday, May 17, 2022, 1:00 p.m. – 3:16 p.m. CST
- Held virtually via Microsoft Teams
- 11 Partner Participants
- 7 Forte Contributors and/or Supporting Members

Meeting Agenda

Welcome & Introductions

Opening Statement, VP of Payment Operations, Brittney Carlisle

Participant Introductions

President's Corner

Discussion and Q&A with CSG Forte's President, Jeff Kump

VOC Insights & Key Business Drivers

Insights from VOC initiatives regarding Customer Experience

Leveraging Customer Data

Discussion around Leveraging Customer Data to Improve CX

Customer Success Executive Director, Jeanette Mbungu

Top Sentiments

- ISVs are not aware of all CSG Forte's features and capabilities.
- ISVs want more functionality for our API's.
- ISVs want better customer support.
- Overall ISVs feel satisfied with CSG Forte products and services.
- ISVs think these meetings are a great opportunity to network and connect.


Meeting Summary

President's Corner

CSG Forte's President Jeff Kump kicked off our meeting with discussion around CSG Forte's 2022 key focus areas, the importance of our partner ecosystem and our core CAB objective - **Unlocking Insights to Strengthen Partnerships**. He talked about how our partner CAB meeting serves the purpose of strengthening our partnerships by keeping an eye on new business models, listening to our partner's needs and being able to reduce pain points, reducing costs, having international expansion, and finding ways to be innovative. We want to support our partners in how they do business, provide value to processes, help our partners succeed, enhance product functionality, better understand the customer journey, and leverage our payments expertise to help partners understand the payments industry. Lastly, he mentioned Forte's philosophy of continuous improvement by enhancing internal processes and making them more efficient.

VOC Insights

CSG Forte's Sr. Customer Intelligence Analyst, Lurina Dallas gave an overview of the *Voice of Customer* program that was launched in June of 2020. The VOC program consists of four continuous cycles where CSG Forte collects feedback from its partners and merchants through various sources like surveys, feedback calls and the Client Advisory Board. The collected data is then interpreted and analyzed to find common themes, trends, and areas of opportunity for CSG Forte to act upon and monitor to ensure that partner's and merchant's voices are in the forefront of how business is done.

 <p>Voice of Customer Program</p>	Listen	<p>Focus on collecting feedback to listen to the perceptions, needs, wishes, expectations, and fears of our customers</p> <ul style="list-style-type: none"> Email Surveys NPS Phone Interviews Satisfaction Survey Direct Unsolicited Customer Feedback Client Advisory Boards
	Interpret	<p>Analyze data from the feedback received to identify insights, anomalies, and trends</p> <ul style="list-style-type: none"> Synthesize Data Benchmark & Track Data Points What did we learn from the data? What does it tell us about our problem or opportunity
	Act	<p>Create value from the data that was analyzed to fulfill our merchants needs and wants</p> <ul style="list-style-type: none"> How is this impacting our customer's experience? What insights did we gain from the data or feedback? What can we do/how can we act on these insights to improve CX?
	Monitor	<p>Track the results of our action cycle by performing follow up surveys to monitor customer sentiments and feelings over time</p> <ul style="list-style-type: none"> In what ways have the changes affected business? Did we improve or resolve the issue E2E? Did the change we implemented improve CX? What is our new NPS , CSAT, CES post acting on insights?

Some relevant data was shared regarding the government CAB meeting launched in 2021, which was made up for a diverse group of government merchants based on demographic, geographic and behavioral variables such as location, revenue, volume, and tenure with Forte. It was a huge success with 79% of the feedback provided during those CAB meeting being implemented or added to the roadmap. For example, 24/7 email support is about to be implemented in Q3, and the framework for 24/7 phone support is in progress. COVID was an important environmental factor that pushed for a more contactless experience and increased the demand for alternative payment methods such as Google Pay, Apple Pay, and Samsung Pay.

New features around reporting was another important topic we were able to act upon. *The Payout Reconciliation Report*, which helps to reconcile funding, went live on February of 2022 in Dex. It was a huge success and a the first of many more reports to come in Dex.

Seeing the success we had with the first CAB makes us even more excited to see what we can accomplish together through this CAB program with our partners.

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CSAT Results & Actionable Insights

CSG Forte's VP of Payment Operations, Brittney Carlisle, shared Customer Satisfaction survey results from 2021. 77% of the respondents stated they were either satisfied or extremely satisfied with CSG Forte, 76% stated that Forte is easy to do business with, 77% stated that Forte's products and solutions meet their needs, 69% stated that Forte is responsive to their needs.

Merchants who have been with Forte for 5 years or more are typically more satisfied than those who have been with us for 1 year or less and merchants who have been with Forte for less than 3 years are typically using integrated software and submitting more support tickets than merchants who have been with Forte longer. Overall, statistics show that CSG Forte's partners and merchants are very satisfied with CSG Forte's products and services.

In addition to the data shared above, there were some suggested areas of improvement that were received from partners and merchants. The survey had four main categories: *Product & Development*, *Customer Support & Success*, *Sales & Implementation* and *Risk Management*. When it came to the first area; 14% suggested improvement in reports and reconciliation, for the second area; 11% suggested improvement in response times, for the third area; 9% suggested improvement in rates and merchant education and training, and for the final area, 12% suggested improvement in funding or other. Forte has been putting its efforts in process improvement and system improvements by expanding the team geographically, extending support times, automation, and more feature capability.

CSG Forte's 2021 CSAT – VOC Integration shows what Forte's doing well; service is reliable with minimum processing disruptions, strong communication of change, incidents and compliance and affordability. For the areas in which Forte does well and has opportunity to improve in the survey identified that a vast number of partner integrations has gaps in best practices in using both solutions. We also need a more simplified and robust UX, and some pain points exist in areas that may impact operations. The survey also revealed what areas Forte needs to improve; Dex reporting and reconciliation, better training and solution resources, improvement of response times.

Lastly, CSG Forte reduced merchant time to first transaction by an average of 69% YoY, reduced limit increase request by an average of 64% YoY and increased Net Promoter Score by 800% from 2020 benchmark which improves overall the customer experience.

Key Business Drivers & Leveraging Customer Data

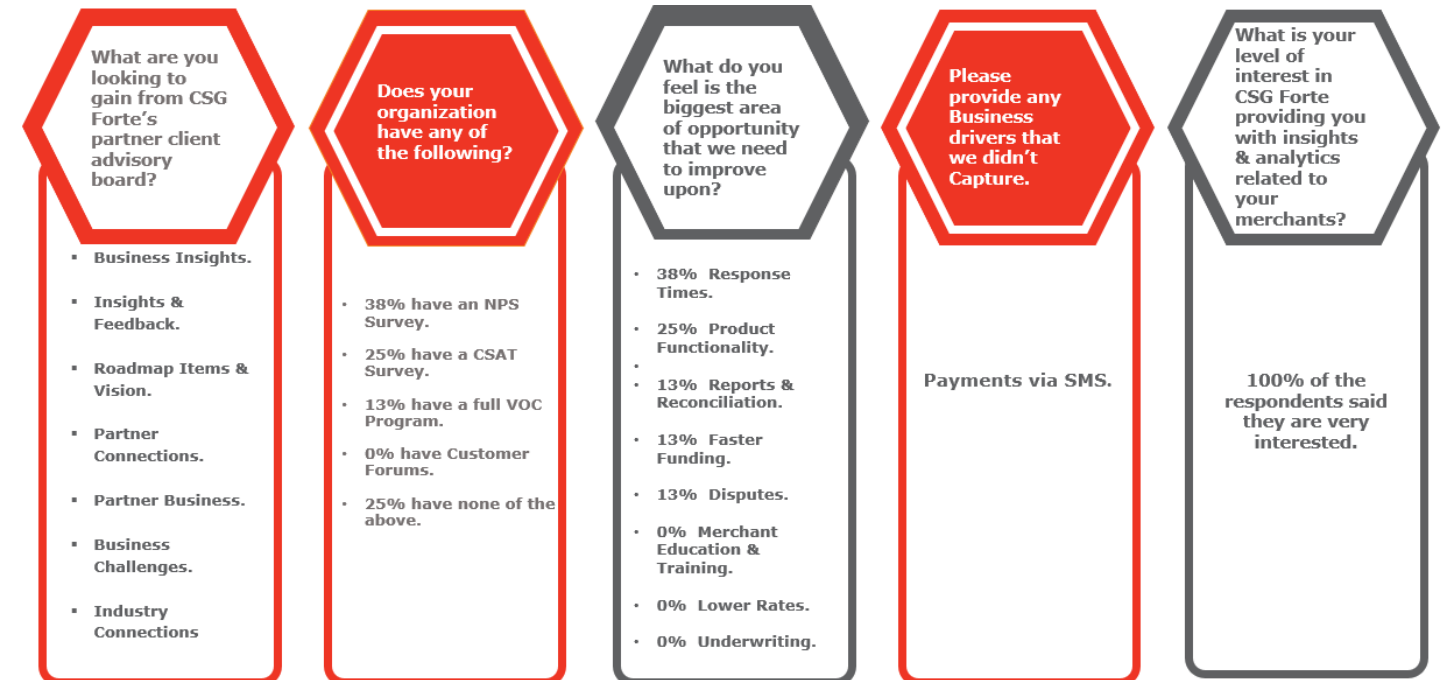
CSG Forte's Executive Director Strategic Business, Jeanette Mbungu went through all three key business drivers we want to focus on. *Superior Customer Experience*; easier and faster onboarding and underwriting experience, faster funding options, tailored support and customized merchant engagement models, vertical and industry expertise. *Secure & Scalable Integrations*; deliver seamless, personalized omnichannel experiences, a high performance, processor agnostic platform, data security and PCI compliance, agile methodology and product roadmap alignment with industry trends. *Drive Business Growth & Profitability*; providing various payment options

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that unlock revenue generating opportunities, go to market strategies, pricing, and billing options to increase profitability.

Finally, CSG Forte's main goal is enabling partners and merchants for success by sharing as much insights as we can so it will be easier for the customers to support their margin portfolio, continue to scale and grow their business. We would love to start sharing key customer data insights from the three customer journey phases: *Onboarding Process*; application status tracking, increase approval ratios and reduce time to decisioning, opportunity close and pipeline, merchant activation, *Portfolio Management*; portfolio performance, insight for faster support and merchant engagement, visibility into full customer lifecycle and journey from onboarding to support, performance trends and areas of opportunity, portfolio insights on customer segmentation MCC, region, product, *Support Analytics*; visibility into merchant support and engagement, insight into top customer needs and improvement opportunities, portfolio health scores.

Meeting Poll Results



What's to come?

Partner CAB Newsletter/Exclusive Resources

Be on the lookout in between CAB meetings for the launch of our Partner CAB newsletter to catch up on meeting insights, the latest info in the payment's industry, and access to an exclusive website specifically for CAB members.

Q3 2022 Meeting

Solutions & Technology Deep Dive meeting will be held August 23rd from 1 p.m. – 3 p.m. Don't forget to include your technical representative in this meeting.