

Sneak Peeks

- Employee Experience
- Whistleblower Report

CustomerConnect 2025

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Presenters



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Agenda

- Employee Experience
- Whistleblower Reports



Employee Experience



Employee Experience

- We are working to provide organizations a single application to access all their Compliance needs as well as their Training assignments. One login to access all of this together.
- Compliance clients may add SAI360's Training options and access all the courses they need such as, but not limited to, Code of Conduct, Conflict of Interest, and more.
- Review Mockups



Whistleblower Reports



Whistleblower Reports

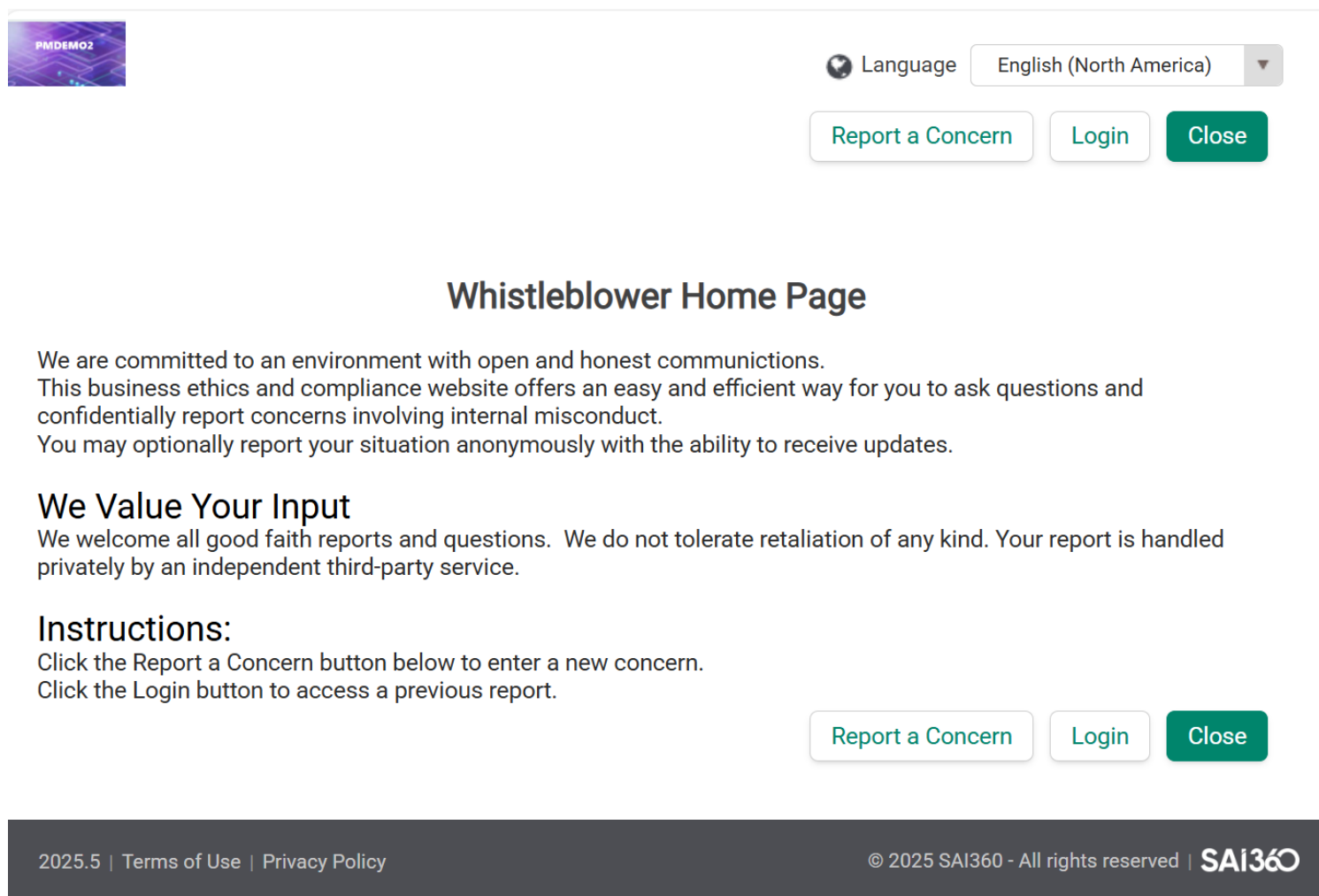
- From a public, custom URL, a user can report a Whistleblower Concern.
- Reporter can choose to remain anonymous.
- Reporter can create login credentials so that later they can return to their report and read/add follow-up messages and/or files to the report.
- SAI360 users can send follow-up messages to the reporter.
- Forms are mobile-ready



Customizable Home page

Supports:

- Custom URL
- Languages
- Branding



Customizable report form

Reporter enters
their own
credentials

Whistleblower Report

Close Spell Check Save **Save and Close** * Required Information

Report Details

Click this link to view guidance on [Reporting a Concern](#)

Company

Business Area

Date Reported

5/27/2025 12:42 PM

Records the date(s) on which this issue occurred:

Date Started

Date Finished

* Description

* Would you prefer to remain anonymous?

No

Reporter First Name

Reporter Last Name

Login Credentials

To access this record in the future, please create a User Name and Password. Make note of these once set, only you will know these values.

Credentials

instruction text

* User Name

* Password

* Re-enter Password

If you would like to add a file as an attachment to your Report, first click the Save button below, then click the New button on the Files list below.

Incidents are created

SAI360 uses Incidents to conduct Investigation

Incidents / Case Management

Whistleblower Division


John (PMDemo2) J. Raabe

Incidents

| | STATUS | NUMBER | NAME | RESPONSIBLE PARTY | DATE RECEIVED | INCIDENT DATE | EXPECTED RESOLUTION DATE | DATE FINISHED | | | ACTIONS |
|--------------------------|--------|--------------------|-----------|----------------------------|----------------------------|---------------|--------------------------|---------------|---|---|---------|
| <input type="checkbox"/> | ★ | Open | 341324190 | Incident name | John (PMDemo2) J. | 5/21/2025 | - | - | 0 | 0 | Actions |
| <input type="checkbox"/> | ★ | Open | 341324191 | some name of Incident | John (PMDemo2) J. | 5/27/2025 | - | - | 0 | 0 | Actions |
| <input type="checkbox"/> | ★ | Initial Submission | 341324192 | ZZ_Reporter, Whistleblower | | 5/29/2025 | - | 5/9/2025 | 0 | 0 | Actions |
| <input type="checkbox"/> | ★ | Initial Submission | 341324194 | Case name | ZZ_Reporter, Whistleblower | 5/29/2025 | - | - | 0 | 0 | Actions |
| <input type="checkbox"/> | ★ | Initial Submission | 341324195 | IT concern user2 | John (PMDemo2) J. | 5/29/2025 | 5/29/2025 | - | 0 | 0 | Actions |
| <input type="checkbox"/> | ★ | Initial Submission | 341324196 | | | 5/29/2025 | 5/29/2025 | - | 0 | 0 | Actions |

Login

Reporter uses
their credentials



Language English (North America) ▼

Sign In

Login Name

Password

[Return](#) [Login](#)



Follow Up & Files

- Bidirectional communication with a Reporter remains anonymous
- Files



Follow Up

* Required Information

Close

Name

IT concern user2

Description

IT concern user2

Date Received

5/29/2025

Follow Up

Add Follow Up





| DATE CREATED ▲ | DESCRIPTION | ACTIONS |
|----------------|--|-----------|
| 5/28/2025 | Thank you for reporting your concern. Please check back in 10 business days for any follow up. | Actions ▼ |
| 5/29/2025 | Investigation is underway | Actions ▼ |
| 5/30/2025 | This is user2 replying OK. | Actions ▼ |

Files

Add File



| ★ DATE | TITLE | ACTIONS |
|-------------|---|-----------|
| ☆ 5/30/2025 |  First file | Actions ▼ |
| ☆ 5/30/2025 |  Second file | Actions ▼ |

Close