



Caplena

Analyze open-ended feedback at scale

Caplena employs **augmented intelligence**, helping you to create actionable results from unstructured text



Next generation of AI-assisted text-analysis

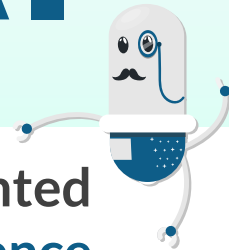
IN



AI



OUT



Open-ended Feedback

Customer satisfaction
Product reviews
Employee feedback
Social media posts
Any kind of open text

Augmented Intelligence

Self-service platform
Managed service
API service

Generated Insights

High-quality tagging

GENERATED INSIGHTS	GENERATED INSIGHTS	GENERATED INSIGHTS
More efficient	Better quality	Faster results

Topic-level
Sentiment analysis

Visualizations &
Dashboards



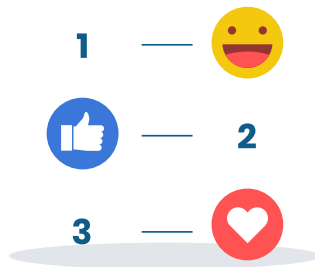
4 steps to convert open-ends into insights

1



Upload any type
of feedback

2



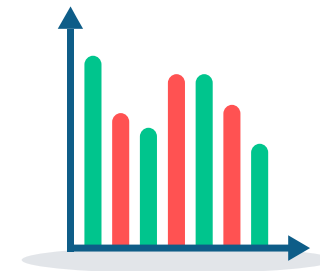
Discover &
define themes

3



Auto-tag &
refine theme
assignment

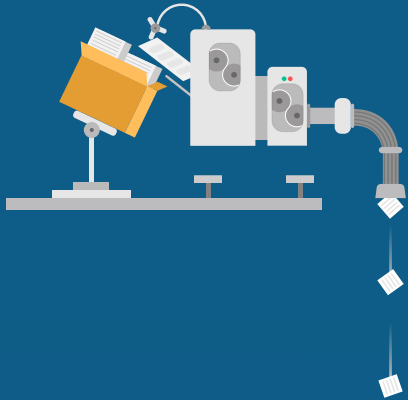
4



Visualize insights
& tell your story

Combine AI with human knowledge to discover meaningful themes

1

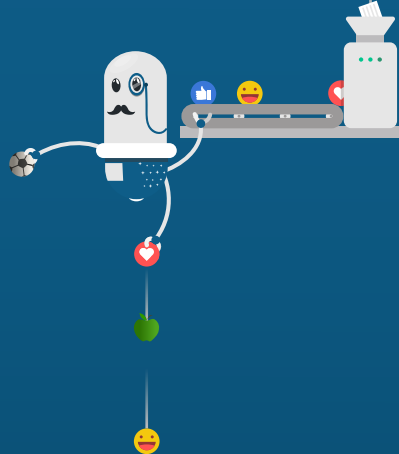


Upload any type of feedback

Import your survey, customer feedback, social media or any other kind of text data conveniently from Excel, SPSS, CSV, JSON files or via API.



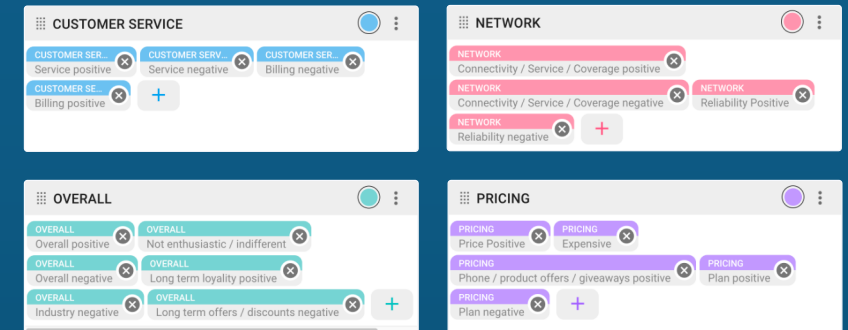
2



Discover & define themes

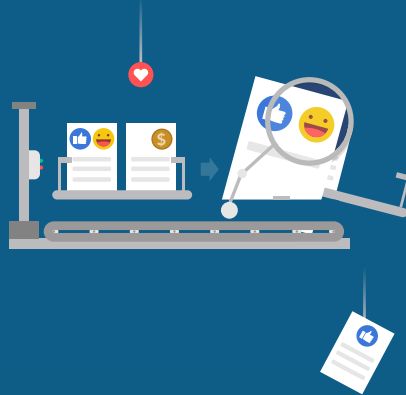
Our unique combination of human-cultivated industry knowledge and AIs massive data crunching ability identifies relevant topics for you.

Confirm, dismiss or supplement the generated themes, or just accept them all.



Let the AI do its magic while focusing on insight generation

3



Auto-tag & refine your theme assignment (coding)

Apply the identified themes (codes) to your entire dataset with the click of a button, including sentiments on topic level. Within minutes our system tags projects with **tens of thousands of rows**.

You can fine-tune the AI if you wish. The system will learn from your changes and improve its predictions on your data set.

4



Visualize insights & tell your story

Visualize the results in **interactive charts**, share them in **handcrafted dashboards** or export your data to continue the analysis with your own tools.

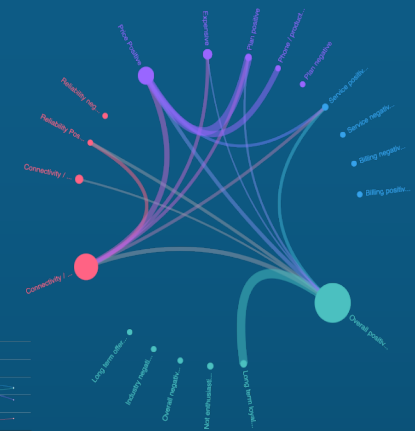
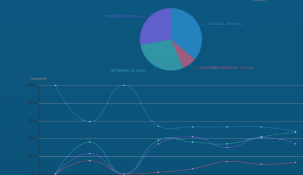
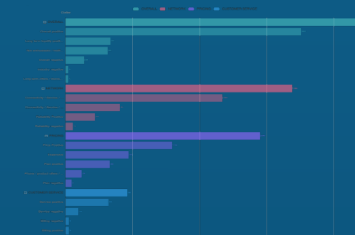
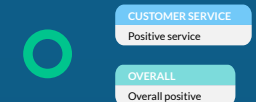
Never a problem and decent rates.



Service is spotty and not super cheap plans available.



My provider has always been incredible to me. Their customer service is the best part however. I can always call and get the help I need.



For freelancers & enterprises

Deep tech AI

- ✓ **AI supported coding:** Let the AI do the heavy lifting, fine-tune to your needs.
- ✓ **Codebook generator:** Let the AI find trends and hidden topics within your data.
- ✓ **Codebook templates:** Hand-curated, quality topic sets for various industries.
- ✓ **Sentiment Analysis:** Detect the tonality of every verbatim and underlying aspects.

Natively multilingual

- ✓ **36 natively supported languages:** Most western languages and more.
- ✓ **Integrated translation:** >100 languages through Google Translate / DeepL.

Charts & Dashboards

- ✓ **Visualizations:** Slice and dice your data, plot trends and detect correlations.
- ✓ **Dashboards:** Share your story in words, charts and images.
- ✓ **Collaboration:** Teams, specific roles and fine-grained permissions.

Security, privacy & support

- ✓ **Outstanding Support:** In most cases you can expect an answer within 1 hour.
- ✓ **Highest Security:** ISO 27001 certified datacenters, data always encrypted.
- ✓ **Privacy & GDPR compliance:** Data only stored within EU.

We add value to a diverse set of customers

VALUE ADD

EFFICIENCY

Providing tools for research agencies to:

- accelerate **operations**
- increase **efficiency**
- generate consistently higher **quality**



ENABLEMENT

Enabling clients to truly become customer centric:

- understand customers **at scale**
- get results in **real-time**
- tap into **new insights**



INNOVATION

Generating new opportunities for solution providers:

- rethink and **enhance** your value-add
- use **flexible** setups (e.g., real-time API) to connect to our cutting edge AI platform



EFFICIENCY

The value add

Market research agencies use Caplena as their go-to tool for analyzing open-ended feedback. Depending on volume, survey complexity and how they use Caplena, they typically experience an efficiency gain between 35% and 90%.

Cost efficiency:

Reduce costs by increasing productivity

Flexibility:

Handling of diverse surveys while leaving humans in control

Portfolio expansion:

New value proposition for market research agencies to perform Big Data analysis



— USE CASES —

Research agencies

“At Factworks we were looking for an efficient and reliable solution for analyzing open-ended survey responses to complement our offering in Text Analytics. Since we specialize in custom research designs, we needed a flexible solution which we found in Caplena. The intelligent algorithm has increased our efficiency with both, tracking and ad hoc studies and the team is very responsive and capable of providing even highly customized solutions.”



Selina Pietch, Analyst at Factworks



“At Link we have chosen Caplena as our everyday tool for coding responses. It helped us to become significantly more efficient at evaluating open-ended questions, radically improved our data management and enabled us to execute on projects with tens of thousands of responses.”

Thomas Bauer, Head of IT Operations at Link

Inhouse Market Research (MR)



"At Joyn we position our market research as the go-to place for decision making, by striving for true user centricity. Our lean research team was looking for a partner that supports us in our mission. With Caplena we found a cutting edge solution that enables us to consistently evaluate open-ended feedback in order to create actionable results. On top of that, Caplena interplays seamlessly within our tech landscape due to its highly flexible setup."

Kilian Hughes, Director Research & Insights at Joyn

"At Coop we are collecting tons of open-ended customer feedback across all our stores, quarterly. Using Caplena for the analysis, we could barely distinguish between human and automatic coding. The system really understands our customers' answers. Moreover, the team closely supported us throughout the entire process so that we were able to complete the project... within just two weeks. Caplena is an important tool for us, enabling effective translation of the ever-increasing amount of feedback into actionable insights."



Johanna Mäder, Market Research Project Manager at Coop

ENABLEMENT

The value add

Inhouse MR departments make use of Caplena for both trackers and ad-hoc studies. As our AI becomes smarter over time, learning from previous projects, the entire process can be streamlined significantly. A mid-size German Telco could reduce the effort required to get an in depth view of their NPS tracker by half.

Fast results:

Detailed picture of trends in trackers, only minutes after the data has come in

Streamlined process:

The amount of manual coding is cut down to a minimum

Continually improving:

Our AI will become smarter over time, needing less and less human help

Solution & tech providers



“At success drivers we were in need of a powerful survey-coding platform for our new CX.AI product. After evaluating a number of commercial and open-source solutions we found Caplena, which outperformed all alternatives by a mile. We now use Caplena to perform insightful and automated key driver analysis on NPS surveys for our clients and can wholly recommend it.”

Frank Buckler, Founder of Success Drivers

INNOVATION

The value add

Third party solution architects make use of Caplena to provide further added value to their clients. Success Drivers for example, bases their CX.AI product on the results of our verbatim tagging. Applications can also be linked to Caplena programmatically through our open API.

API connection:

Access to Caplena's solution through a REST API

Flexibility:

From automated over-night batch-processes to real-time solutions

Variety:

Caplena platform is designed to support a various set of potential use cases (e.g., auto-coding text from a chatbot conversation in real-time)

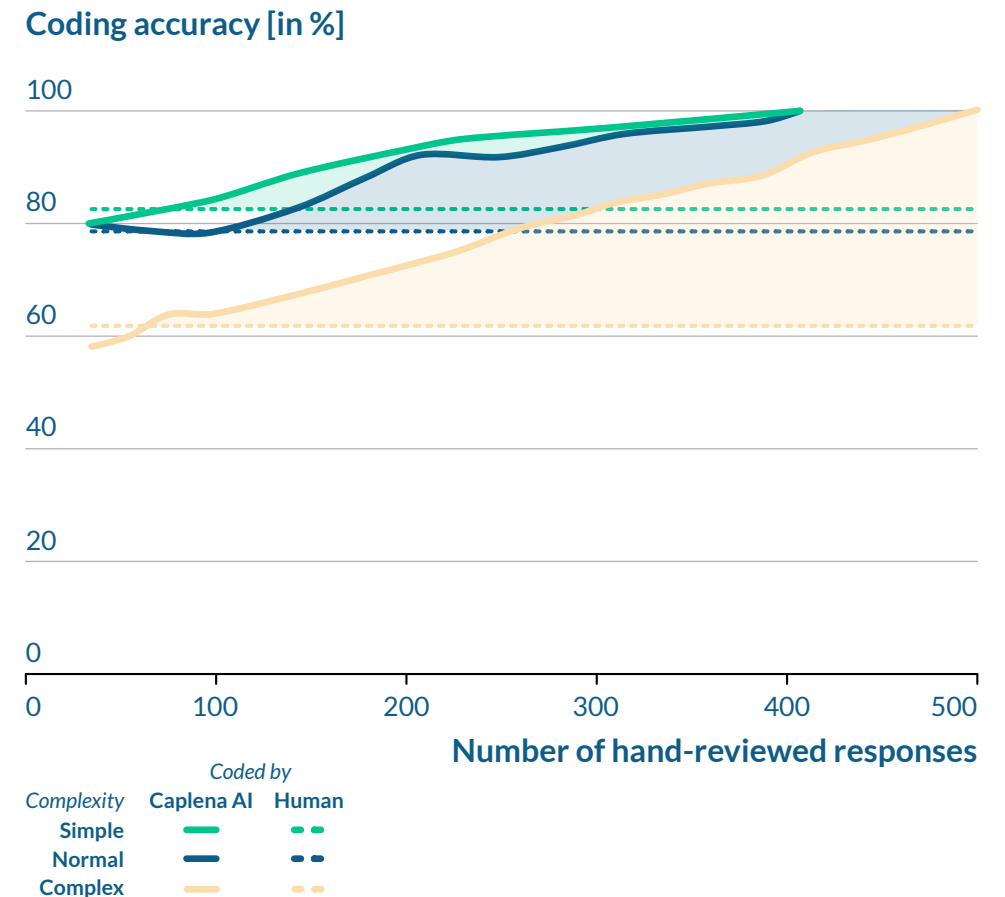
Award winning AI powered by deep tech

- Award winning Neural Network ^[1, 2, 3]
- Unique, **three stage** learning:
 - Public data (e.g., Wikipedia)
 - Learning transfer from **4m hand-reviewed** responses on Caplena platform
 - **Fine-tuning** and specific learning relations
- **Best text classification engine** on the market:
Based on customer tests

[1] <http://e-collection.ethbib.ethz.ch/show?type=dipl&nr=968>

[2] <https://aclweb.org/anthology/S/S16/S16-1173.pdf>

[3] <https://www.inf.ethz.ch/news-and-events/spotlights/semEval2016.html>



We take great care of your data and your privacy



SECURITY

- Network connections are always TLS 1.2 encrypted
- All data on our servers is stored with AES-256 encryption
- The data centers we use are ISO 27001 certified
- Two-factor authentication



PERSISTENCE

- We keep continuous backups of our databases
- A history of the analysis progress is kept, such that the state can be reverted to a previous moment at any time



PRIVACY

- We only use datacenters located in the EU
- If required by the customer, we can guarantee to erase all customer's data within 10 days

PRICING

Self-service / SaaS

Freelance

€ 99
per month

Core

- ✓ AI powered coding
- ✓ AI powered codebook generator
- ✓ Industry & NPS codebook templates
- ✓ CSV and Excel data import & export
- ✓ Translation through Google Translate

User management

- ✓ Included accounts: 3
- ✓ User access roles: 1

Support

- ✓ Email support
- ✓ Training data upload: Optional (fees apply**)
- ✓ Live trainings: Optional (fees apply**)

Admin

- ✓ Payment by credit card

Business

€ 249
per month

Freelance plus:

Core

- ✓ Charts & Dashboards
- ✓ API access
- ✓ SPSS & JSON import & export
- ✓ Translation through DeepL

User management

- ✓ Included accounts: 10
- ✓ User access roles: 3
- ✓ Project specific permissions

Support

- ✓ Chat support, 1 business day response guarantee
- ✓ Up to 3 training data uploads per year
- ✓ 1 live training per year

Admin

- ✓ Payment by invoice

Enterprise

€ 399
per month

Business plus:

Core

- ✓ Corporate identity color palettes
- ✓ White-label dashboards
- ✓ Feature prioritization

User management

- ✓ Included accounts: Unlimited
- ✓ User access roles: 5
- ✓ Customizable user access roles

Support

- ✓ 3h response guarantee via phone & chat (during business hours)
- ✓ Up to 5 training data uploads per year
- ✓ 4 live trainings per year

Admin

- ✓ Customer provided agreements (e.g., DPA)
- ✓ Service level agreements

All **SUBSCRIPTIONS** include
1'500 monthly credits*

1 month discount on
yearly subscriptions

TOP UP with non-
expiring credits*

500 credits
€ 50

2'500 credits
€ 200

10'000 credits
€ 500

50'000 credits
€ 1'500

200'000 credits
€ 5'000



VAT is not included.

* 1 credit allows for analyzing & downloading 1 text response / feedback response for a single question, empty responses are not counted. Included "monthly credits" expire per end of month. "Non-expiring credits" accumulate over time if not depleted.

** Optionally available for additional fee of € 150.

PRICING

Managed Service

The image shows a pricing calculator for the 'Managed Service'. On the left is a form with several input fields: 'Number of respondents: 2000' with a slider, 'Respondents who replied to open-end: 75%' with a slider, 'Number of open-ended questions: 1' with a slider, 'Urgency' with radio buttons for 'Express' and 'Normal' (Normal is selected), 'Open-ends are overly long / complex' with a toggle switch, 'Language(s)' with a dropdown arrow, a 'Comments' text area, and a 'Data upload' section with a 'Select file' button. On the right is a dark blue summary box. It states the 'Base price for this respondent volume' is '€ 0.2 per response', followed by the calculation: '= € 0.2 per response' and '= € 0.2 × 2000 × 0.75 × 1'. Below this, it shows 'Total: € 300' and 'Completion within 2 working days'. A green button says 'Request binding offer'. At the bottom of the box, a disclaimer states: 'The numbers presented here do not represent a binding offer. A final price will only be offered after submission of the data. We do not provide coding on adverse event reporting data.'

Number of respondents: 2000

Respondents who replied to open-end: 75%

Number of open-ended questions: 1

Urgency ☐ Express ☒ Normal

Open-ends are overly long / complex: ☒

Language(s) ▼

Comments

Data upload

Base price for this respondent volume
€ 0.2 per response

= € 0.2 per response
= € 0.2 × 2000 × 0.75 × 1

Total: € 300
Completion within 2 working days

The numbers presented here do not represent a binding offer. A final price will only be offered after submission of the data. We do not provide coding on adverse event reporting data.

For those looking for a **zero-effort** solution or want see an example of a **well-structured** codebook (themes structure) & **consistent** coding of their data.

- Codebook development
- Fine-tuning of AI towards your data
- Providing basis for self-service automation

Please use our online price calculator for an pricing indication, we are happy to send you an offer:

<https://caplena.com/en/managed/>

We strive for adding real value to our customers

Caplena GmbH is a **tech startup**, founded in 2017 by two ETH graduates. It is the AI tool to analyze open-ended feedback, wherever it may come from.

Based in **Zurich**, Switzerland, we serve companies around the world. From **global market research institutes** to **agile start-ups**, Caplena **empowers market research teams**, increasing efficiency through automation and boosting quality with deep tech.

Caplena GmbH, Zweierstrasse 165,
8003 Zurich, Switzerland

Over **10M feedbacks** on our platform

Customers from over **12 countries**

250 surveys upload every week



Entrepreneurial team driving progress



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Full stack developer

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Pascal de Buren

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ML engineer

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Misel Marusic

Employee #1 &
BD entrepreneur

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Appendix

– Subscription feature details

Freelance feature details

Freelance

Core

- ✓ AI powered coding | [Code \(tag\) open-ended & list-type feedback](#). Use Caplena's continuously learning AI to automate your analysis. Receive verbatim & aspect-level sentiments.
- ✓ AI powered codebook generator | [Get meaningful code \(theme\) suggestions from the AI from your feedback data to find trends and hidden topics.](#)
- ✓ Industry & NPS codebook templates | [Use hand-curated, quality topic sets as a starting point for your analysis.](#)
- ✓ CSV and Excel data import & export
- ✓ Translation through Google Translate

User management

- ✓ Included accounts: 3
- ✓ User access roles: 1 | [All accounts are on the 'Full access' role, sharing access to all projects between team members.](#)

Support

- ✓ Email support
- ✓ Training data upload: Optional (fees apply*)
[Already coded data can be used to train the AI algorithm, to apply learnings to new projects as well as to extract already created codebooks.](#)
- ✓ Live trainings: Optional (fees apply*)

Admin

- ✓ Payment by credit card

* Optionally available for additional fee, see page 13 for more information.

Business feature details

Business

Freelance plus:

Core

- ✔ Charts & Dashboards | Access Caplena's chart module to visualize your insights and create customizable dashboards to share your story.
- ✔ API access | Get access to Caplena's REST API to automatize data transfer or to programmatically make use of Caplena's AI services.
- ✔ SPSS & JSON import & export
- ✔ Translation through DeepL

User management

- ✔ Included accounts: 10
- ✔ User access roles: 3
 - Choose a specific role for each account within your organization:
 - 1. Full Access: Upload capability; Access to projects & dashboards of all team members.
 - 2. Project Manager: Upload capability; Only full access to projects created by oneself, but access to all codebooks and AI fine-tuning learnings from all team members.
 - 3. External Coder: No upload capability; No access to projects or Dashboards of others by default.

- ✔ Project specific permissions
 - Grant additional permissions to accounts on a per-project basis, for the following permission types: Uploading, viewing, downloading, editing, modifying permissions, inheriting, appending and deleting.

Support

- ✔ Chat support, 1 business day response guarantee
- ✔ Up to 3 training data uploads per year
 - Already coded data can be used to train the AI algorithm, to apply learnings to new projects as well as to extract already created codebooks.
- ✔ 1 live training per year

Admin

- ✔ Payment by invoice

Enterprise feature details

Enterprise

Business plus:

Core

- ✓ Corporate identity color palettes | Create visualizations with your corporate identity color scheme.
- ✓ White-label dashboards | Hide Caplena branding and add your custom logo & slogan to the dashboard.
- ✓ Feature prioritization | Request new features and we will put them on our roadmap with a higher priority.

User management

- ✓ Included accounts: Unlimited
- ✓ User access roles: 5
Choose a specific role for each account within your organization:
 1. Full Access: Upload capability; Access to projects & dashboards of all team members.
 2. Project Manager: Upload capability; Only full access to projects created by oneself, but access to all codebooks and AI fine-tuning learnings from all team members.
 3. External Coder: No upload capability; No access to projects or Dashboards of others by default.
 4. Internal Coder: No upload capability; Permission to edit and access projects of all team members, but no permission to download projects and no access to Dashboards of others.
 5. Analyst: No upload capability; Permission to view, download and visualize projects of all team members, but no permission to edit them.
- ✓ Customizable user access roles | Define additional, customized roles.

Support

- ✓ 3h response guarantee via phone & chat (during business hours)
- ✓ Up to 5 training data uploads per year
Already coded data can be used to train the AI algorithm, to apply learnings to new projects as well as to extract already created codebooks.
- ✓ 4 live trainings per year

Admin

- ✓ Customer provided agreements (e.g., DPA)
- ✓ Service level agreements
Get an uptime guarantee: Availability of > 99.8% (averaged monthly) – Refund of 50% of monthly fee if below 99.8%, refund of 100% of monthly fee if below 98%. Refund of 50% if support times are not adhered to.