



Introduction to Xponent

This will be recorded and shared
with you after the presentation

Agenda

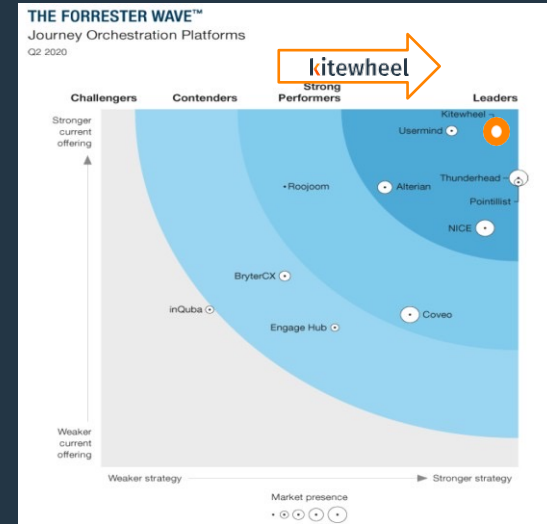
- 01 Introduction to Xponent
- 02 Journey Management Process
- 03 Xponent Personas
- 04 Terminology
- 05 Xponent Hub Navigation
- 06 Journey Analytics Components
- 07 Review Questions



Xponent

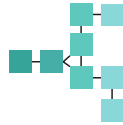
Customer Journey Orchestration and Analytics

- ◀ Over 8 years of experience in customer journey orchestration
- ◀ Recognized strategic leader in real-time decision technology - Forrester
- ◀ Massively scalable platform supporting over 1,000 complex decisions per second (100M per day)
- ◀ Suite of visual decisioning tools based on 15+ years of market-leading development
- ◀ Symbiotic with internal decision science investments and outputs
- ◀ Global Clients top-tier brands in finance, telco, retail, CPG, travel, auto, tech
- ◀ 30+ global partners with implementation world-wide



Core Capabilities

Core Journey Capability



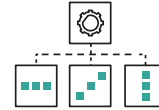
DATA FUSION

- Real-time journey data collection and linking
- Easily connect to other systems to receive and send data



JOURNEY DESIGN AND PLANNING

- Strategic journey mapping visualization interface
- Customer journey template library



JOURNEY AUTOMATION AND ORCHESTRATION

- Real-time decision engine framework
- Unified logic across the marketing and service ecosystem



JOURNEY TESTING AND OPTIMIZATION

- Real-time journey metrics and analytics
- Customizable dashboards

Xponent Functionality

Xponent Personas

Primary

Journey Manager



Joanna, the Journey Manager

INTERESTED IN...

- Validating and challenging pre-defined notions of customer journey
- Designing, measuring and investigating use cases (or visions)
- ROI
- Impact on customer retention, acquisition, revenue

Configurer



Cory, the Configurer

INTERESTED IN...

- Identifying data sources
- Designing logic
- Solutions architecting logic and rules
- Testing and deploying new orchestration journeys

Analyst



Alex, the Analyst

INTERESTED IN...

- Discovering and investigating the Who, How, Why in order to:
 - Measure and increase effectiveness
 - Predict behavior
- Mapping journey performance against KPIs and benchmark

Secondary

Executive



Elias, the Executive

INTERESTED IN...

- Impact of Kitewheel
- ROI
- Impact on customer retention, acquisition, revenue
- Cost to Serve

Technical & Support



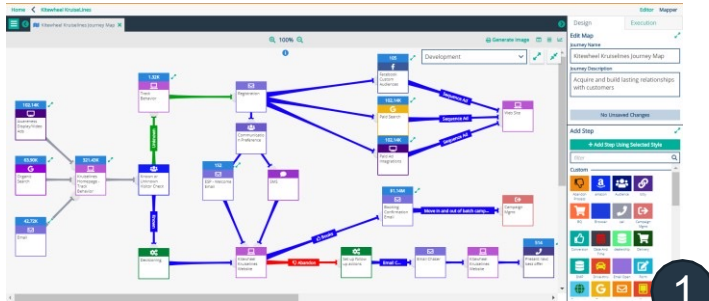
Tanner, the Tech & Support

INTERESTED IN...

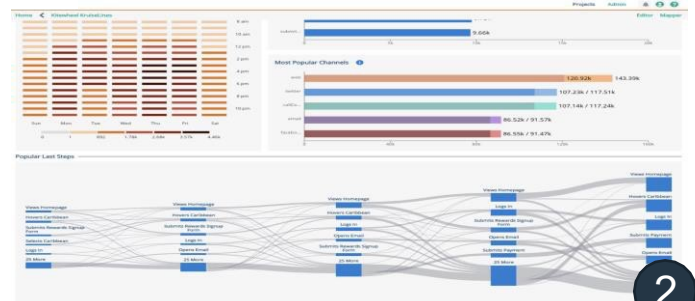
- Enabling tech environment - servers, database
- Handling security and internet facing services
- Supporting accounts and projects
- Production support and continuous operation

Key Components

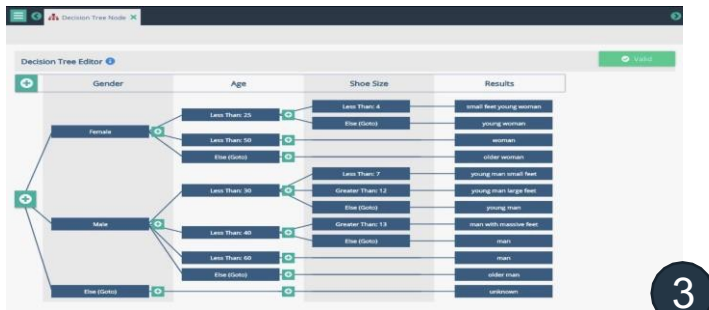
Journey Design & Planning



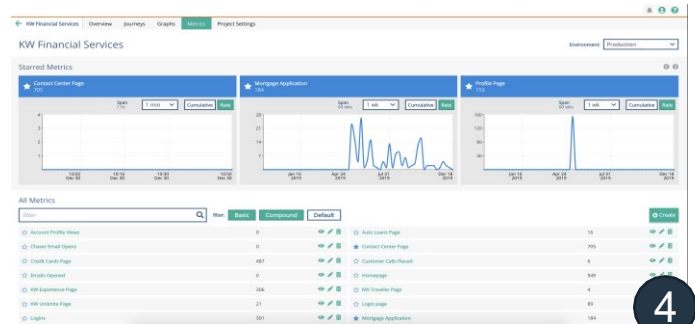
Data Fusion & Analytics



Decisioning & Orchestration



Testing & Optimization



Terminology

- **Journey**

A full customer experience with your brand over time. This can be split into multiple journeys and a customer can be in any one of the journeys.

- **Orchestration**

Using information about known pain-points/ blocks or even using hypotheses on how to improve the customer's experience, using a set of messages at the right time on the right channel (or pausing communication) to get the customer journey moving towards the desired goal.

- **Journey Optimization**

Collecting information during the customer journey to track the progress of the journey, compare against benchmarks to evaluate the success of orchestration. If one option is working better than the others, then divert as many eligible customers as possible toward this option.

Xponent terms

Hub	The Hub is where projects and admin settings reside. The Xponent Hub can be accessed from any browser. We recommend Chrome.
Engine	Graph Execution Service that is available to test the graph on the UI as well as to run on the cloud
Project	Logical collection of Journeys/ concepts that share a set of connections and rules
Connection	Xponent Connections are the definitions of all the connections in a Project- for example connections to a particular database, web service API or to Twitter
Journey Map	Visual representation of the customer journey that contains the journey steps and shows the direction the user will take to move toward the journey goal
Journey Step	A moment of interest to a business within a consumer journey
Graph	These are the actual executable representation of the journey. Graphs are made up of nodes and links
Metric	Counts of transactions, users, monetary value linked to an action, or a complex calculations based on existing metrics
Environment	Defined usually as 'Development', 'UAT' and 'Production'. You can make as many environments as possible in a Project. In a new Project, there is a 'default' environment automatically created and it can be renamed at any time
Version	Snapshots of the entire Project- journey maps, graphs, metrics and project settings- that enable the user to identify the state of the project at the time of version creation

Xponent terms

Profile	A Profile is defined as all the attributes associated to a customer, such as unique identifiers of a customer (e.g., customer ID, account ID, email address), Interactions and associated context, Journey Steps and associated context and Attributes (e.g., demographic information)
Interactions	Atomic level activity that is channel specific (e.g., form click on web)
Attributes	Non-unique descriptive metadata tied to a Profile (e.g., first name and last name)
Xponent Data Model (KDM)	The underlying journey data model from Kitewheel, comprised of Journey Steps, Profile and Interactions
Xponent Identity Manager	Synchronizes and merges seamlessly the various identities from diverse systems. Uses the find, create and collapse methodology
Journey Discovery Analytics Dashboard	The analytics tab within a specific project designed to provide businesses an overview of the most popular behavioral flow of their customers
Deploy	Once tested and approved, graphs can be set to run on the cloud in any environment

Getting Started



Anatomy of a Project

- **Overview** tab will give you the high-level status of the Project (i.e., what is running and in which environment)
- **Journeys** will have all the Journey Steps and Journey Maps in the project
- **Graphs** will contain all the execution graph logic
- **Metrics** will have a collection of all default and user created metrics
- **Analytics** will only be visible if enabled on the project by Kitewheel Support
- **Project Settings** include connection definitions, environment settings, identity manager settings and deployment controls

The screenshot shows the Xponent interface for a project named 'Kitewheel Kruiselines'. The navigation bar at the top includes tabs for Overview, Journeys, Graphs, Metrics, Analytics, and Project Settings, with 'Overview' selected. Below the navigation, the page title is 'Kitewheel Kruiselines' and a brief description states: 'Kitewheel KruiseLines Demonstration supports the full customer lifecycle. There are identified issues with web site conversion and repeat bookings that need to be worked on for Kitewheel Kruiselines to remain the #1 choice for cruisers. Organization: Kitewheel Demo'. A 'Deployments' section is visible, showing three environments: Dev (5 Graphs Running), Production (6 Graphs Running), and UAT (0 Graphs Running). Each environment has a 'View Deployments' link.

Environment	Status	Action
Environment: Dev	5 Graphs Running	View Deployments
Environment: Production	6 Graphs Running	View Deployments
Environment: UAT	0 Graphs Running	View Deployments

Xponent Journey Analytics Ecosystem

4-Pronged Approach

Metrics address use cases such as “How many times has my journey been executed?” and “How many events have I processed against my goal?”



Journey Analytics address use cases such as “What were the most popular first and last steps?” and “What were the most commonly used channels?”



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filing

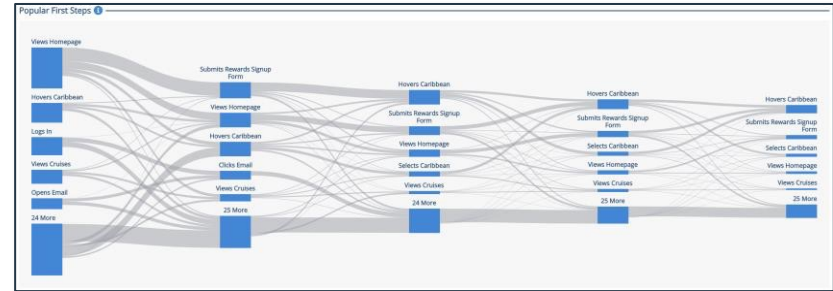
Performance Dashboard address use cases such as “How is my journey performing against goals and KPIs?” and “What is the overlap between my journeys?”



Data Lake augments an existing data warehouse and builds a richer set with journey data. It can be used to build and test predictive models using historical journey data.

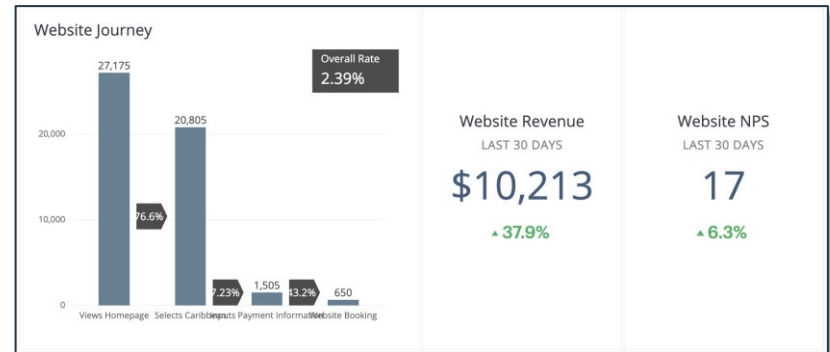
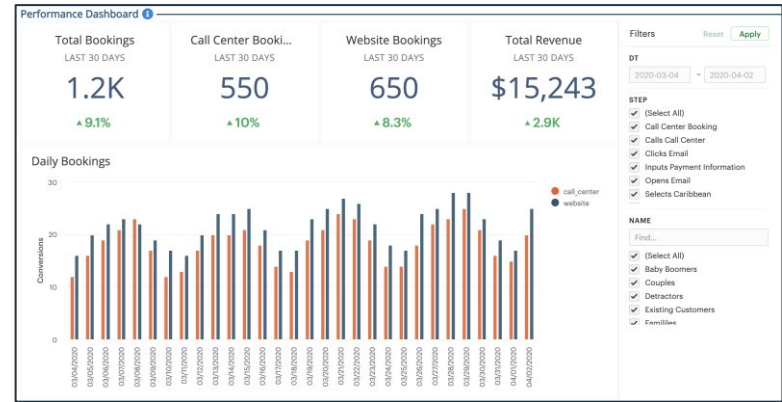
Journey Discovery Analytics

- Use Case: Discovery Insights
 - What were the most popular first and last steps?
 - What were the most used channels?
- Description
 - Provides an insights layer to understand what is happening to customers across various channels.
 - These insights provide details as to what paths most customers are following when they start and end their interactions with your brand.
 - View of cross channel overlap to understand how and where users are engaging.



Performance Dashboard

- Use Case: Performance Reporting
 - How is my journey performing against goals and KPIs?
 - What is the overlap between my journeys?
- Description
 - Performance Dashboards provide a custom view into project goals and KPIs.
 - Designed to provide a view of how your journeys are performing.
 - Breakdowns into critical segments and can be used to dig deeper into the insights found from Journey Discovery.





Review

Questions

- What is a customer journey?
- What is a journey map?
- What is a graph?
- What is the difference between the two?
- What is the difference between the Discovery Dashboard and the Performance Dashboard?



Thank You

<https://www.csgi.com/products/xponent/>

