



Introduction To Journey Management

Agenda

01 Intro to Journeys

02 Journey Steps

03 Journey Mapping

04 Interactions

05 Profiles

06 Analytics



Enterprise User Personas

Key Xponent Users

Primary Users



Journey Manager

- Plan customer journeys
- Develop customer experience strategies

- Strategist, planner, product manager



Configurer

- Configure journeys to match the strategic plan
- Connect data, build and test journey rules

- Business analyst, MarTech user



Analyst

- Discover journey behavior of customers
- Map performance against KPIs and benchmark

- Data scientist, BI or predictive analytics user

Secondary Users



Executive

- Understand ROI
- Direct efforts on customer retention, acquisition, revenue

- Views reports, makes decisions



Technical & Support

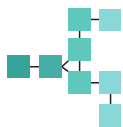
- Enable tech environment - servers, database
- Handle security and internet facing services

- Assigns permissions and credentials

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.

Core Capabilities



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



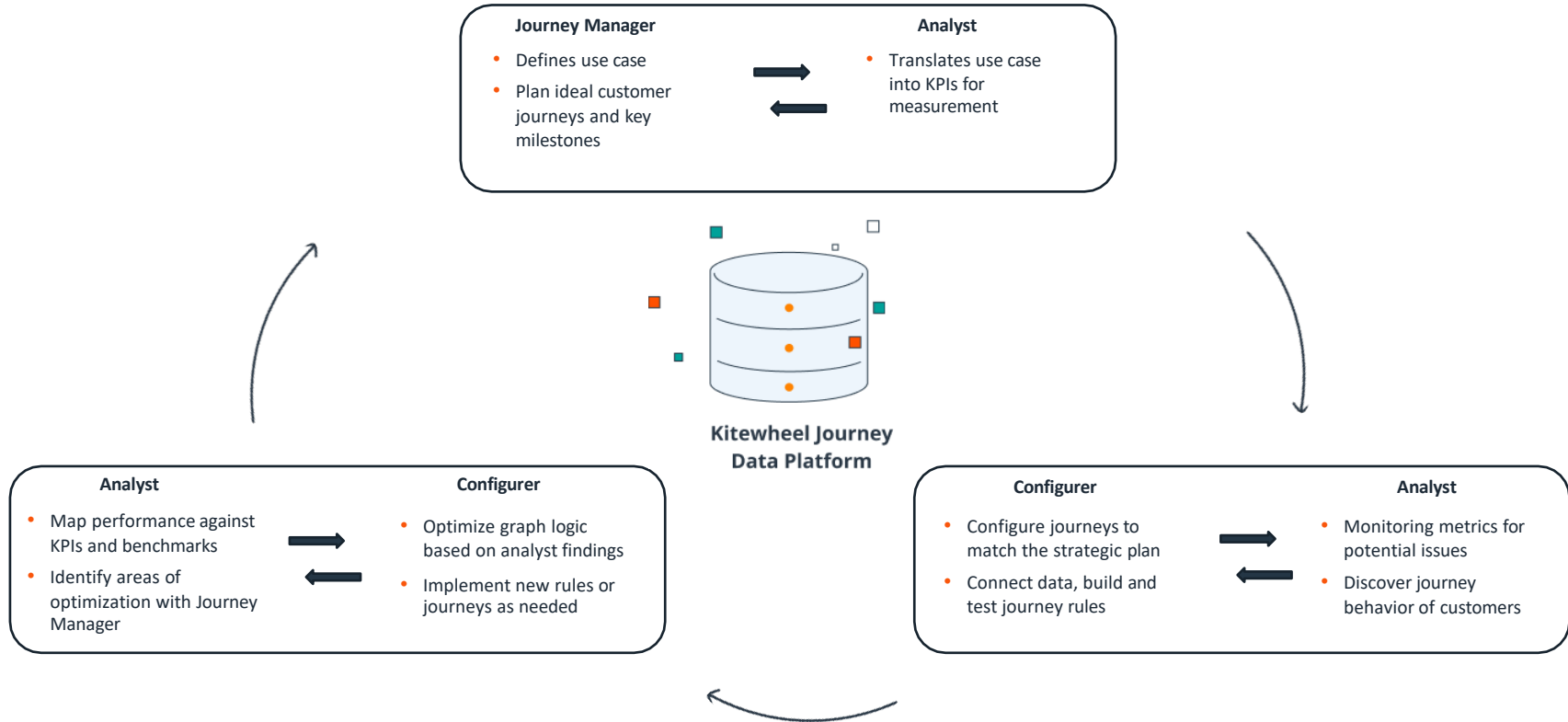
JOURNEY TESTING AND OPTIMIZATION

- Real-time journey metrics
- Customizable analytics dashboards

Journey Management Process

- Our fundamental principle is that Customer Journey Management is an iterative process
 - A circular framework where every stage is meant to inform the next
- Use case definition is the first step to getting started with customer journey management
- Key to success in journey management is ensuring collaboration across the 3 main user personas
 - Journey Manager sets the strategy (aka use case), the customer journey, success measurement
 - Configurer implements the orchestration strategy based off of the use case
 - Analyst evaluates the success of the use case based off of previously defined success measurement and identifies any new bottlenecks, opportunities for future orchestration

Our Journey Management Process



Question

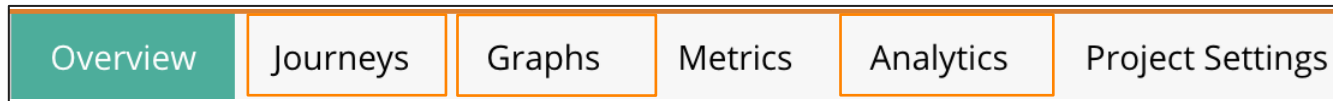
Why is it critical for Journey Managers, Configurers and Analysts to work hand-in-hand during all 3 stages?

Journey Orchestration Hub - Terms

Profile	A Profile is defined as all the attributes associated to a customer, such as unique identifiers of a customer (e.g., company account ID, KWID), interactions, journey steps, and attributes (e.g., demographic information, journey_path, emails_sent_obj)
Interactions	Atomic level activity that is channel specific (e.g., form click on web, opens email, clicks unsubscribe link)
Attributes	Non-unique descriptive metadata tied to a Profile (e.g., repeat_customer, template_id, interest_insurance)
Xponent Data Model (XDM)	The underlying journey data model from Xponent, comprised of Journey Steps, Profile and Interactions
Journey Discovery Analytics (JDA) Dashboard	The analytics tab within a specific project designed to provide businesses an overview of the most popular behavioral flow of their customers
Self Service Analytics Dashboard	Custom, personalized dashboards that have been created in Domo. (e.g., Metrics, Offer Comparison)
Deploy	Once tested and approved, graphs can be set to run on the cloud in any environment

Translating This to the Journey Orchestration Hub

- The Journey Orchestration Hub comprises 3 main sections:
 - Journey
 - Graph
 - Analytics
- Each section is designed to serve the key stages within the Journey Management process
 - As we go through the training modules, you will be exposed to these key sections



Hands-On: Create Project

Question

What is a Journey?

What is a Journey?

- A full customer experience with your company over time.
- Not just a single transaction or experience
- Has one or more desired behavioral goals.

Questions to Consider:

- What are the key business phases of the journey?
- What are the important measures?
- What is the outcome?
- What graphs do you need?

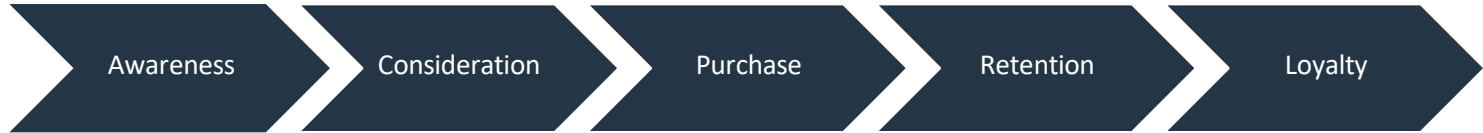
The Journey Map

- Visual representation of the journey
- Shares with the stakeholders how a customer journey should flow

Common Misconception

Journey is Linear

- Business tends to think of these journeys as linear progressions, such as a funnel



Question

So, why do we even bother with
Journey Mapping?

Importance of Journey Mapping

- Journey Maps help businesses visualize what an ideal customer journey should be
 - Can be created and should be shared with all necessary stakeholders of how a customer journey should flow, either based off of business objectives or current customer behavior
 - Configurers will use it to understand the logic during the implementation phase
- This can also be an exercise to help businesses understand how to break down key milestones or what parts to the journey should be considered as key milestones
 - Key milestones = journey step definitions

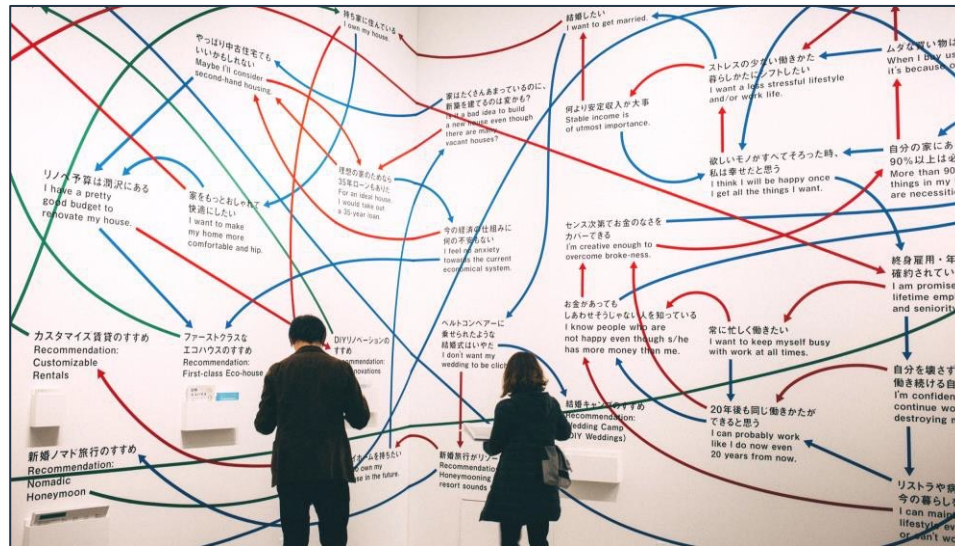
Common Pitfalls of Journey Mapping

- Historically, journey mapping exercises have been done as a “do it once and that’s it”
 - Very rarely is this an iterative process
- BUT customer journeys do not stay the same over time
 - What is ideal may not match what is actually happening
 - It is important to keep coming back to the journey map and iterate to bridge the gap of ideal vs reality

Key Milestones

Why is it Important?

- Defining key business milestones throughout a customer journey helps businesses to be able to remove noise – see the forest from the trees
- If everything is tracked equally, it would be hard to discern patterns and quickly get to the pain points of a journey



What is a Journey Step?

- An individual's movement that is of interest to the business
- Could be a single interaction, culmination of interactions, or combination interactions
 - Submits registration form
 - Ask Service Rep to close account
 - Opens email
 - Views a specific product three times

Examples

- Opted-In to Newsletter
- Signs up on website
- Shows interest in program x



Submits Registration Form

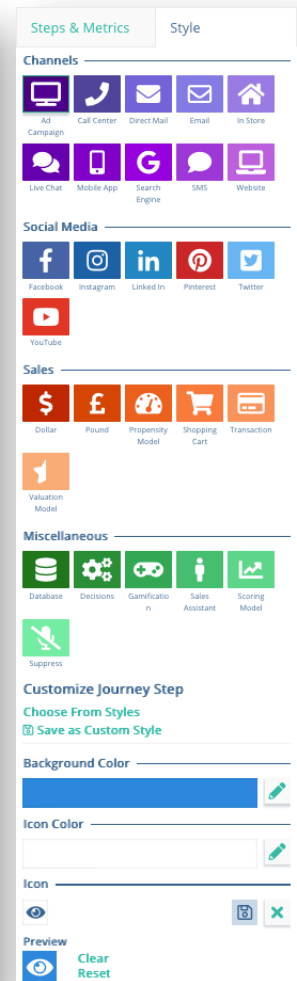
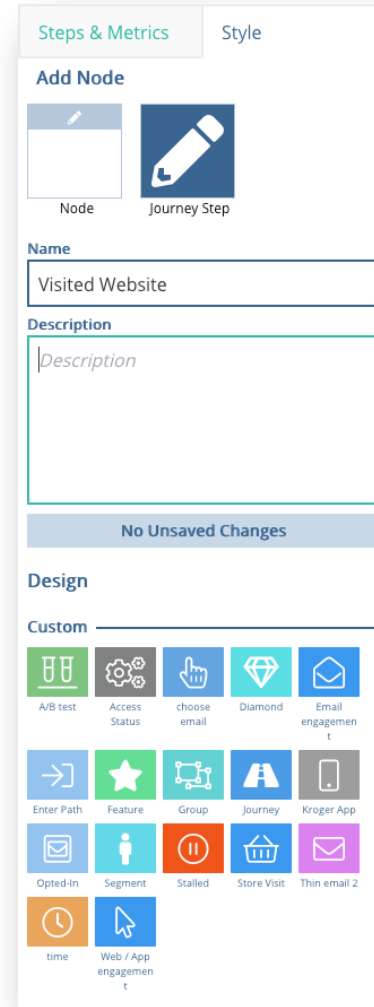


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Sample journey step

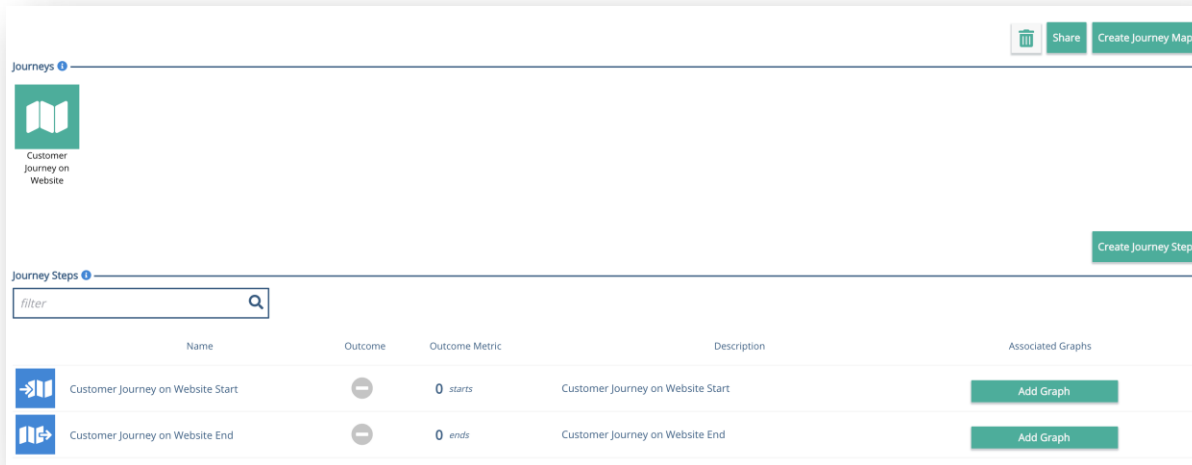
Creating a Journey Map

- Login
- Create a new Journey Map
- Add journey steps and nodes to the graph
- Xponent provides options to customize your journey map and help bring the visualization to life
 - Click on the journey step or node
 - Use the pallet to customize the style and colour scheme
- Once the Customer Journey has been created, you will see the Journey Mapper interface that allows the creation of customer journeys in a free-form manner









Starting and Completing a Journey are Special Steps

- A beginning and end journey steps are by default, added to the journey map
- Added by default to journey maps to help users understand the start and end of a journey
 - “Neutral” outcomes and cannot be removed from the journey map
- Can be added to the graphs in order to be used in analytics



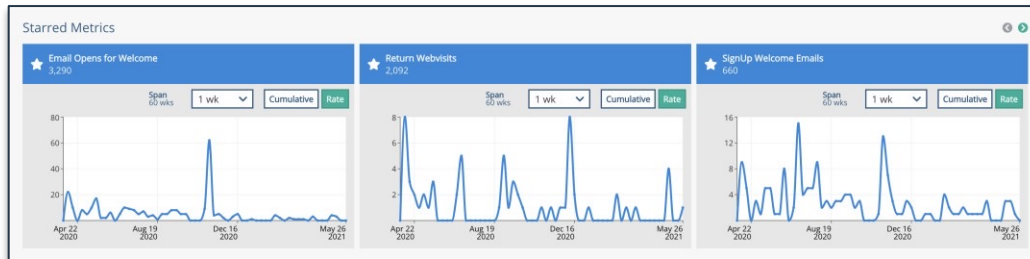
The screenshot shows a software interface for managing journeys. At the top, there's a 'Journeys' section with a trash icon, 'Share', and 'Create Journey Map' buttons. Below this is a card for 'Customer Journey on Website'. The main section is 'Journey Steps', which includes a search filter and a table of steps.

	Name	Outcome	Outcome Metric	Description	Associated Graphs
	Customer Journey on Website Start		0 starts	Customer Journey on Website Start	
	Customer Journey on Website End		0 ends	Customer Journey on Website End	

Metrics Make the World Go Around

Metrics gives the business a real-time count of how a journey is performing

- Metrics:
 - are used to count numeric and monetary outcomes
 - can have optional goals
 - update automatically in real-time
- Metrics can be associated with journey step nodes or graph nodes
 - This causes the metric to increment
- Favourite metrics display on the home page project tile and on each journey or graph



Create Metric

Name (Short Display Name)

Description (Optional)

Basic

Compound

Metric Options

Metric Type

Count

Currency

Goal (Optional)

☆ Total Visitors

Basic Metric

No Metric Description

Performance

Current Value: 35

Type: Count

Reset Count

Environment

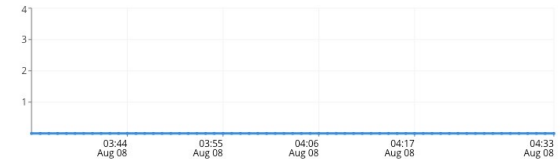
default

Span

1 min

Cumulative

Rate



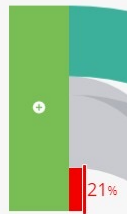
Metrics & JDA

Discovery Performance Pulse

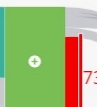
Popular First Steps ⓘ

Outcomes Stalls

Visit Quote Re...



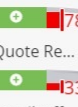
Provide Conta...



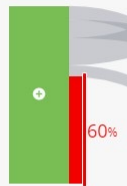
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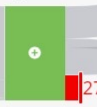
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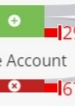
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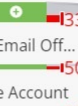
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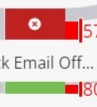
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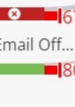
Close Account



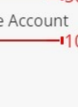
Close Account



Close Account



Click Email Off...



Click Email Off...



Click Email Off...



Visit Quote Request Page > Provide Contact Info

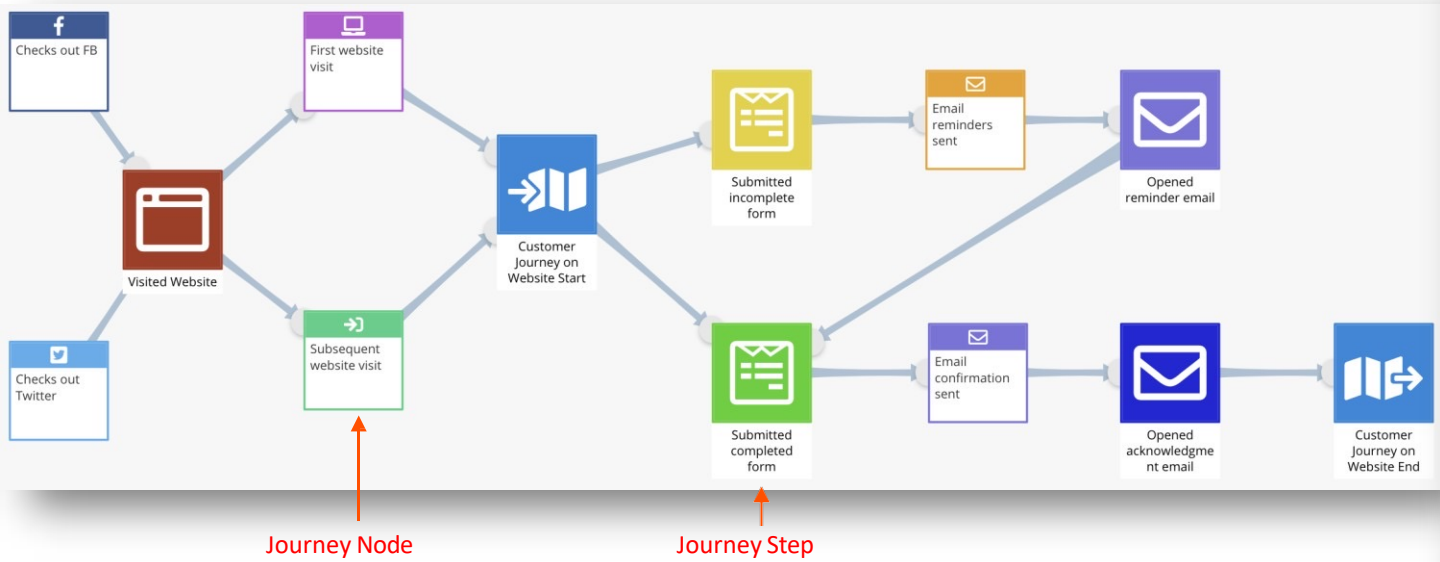
Total ⓘ 31

Avg. Time Between Steps ⓘ 43 Min

View Profile

Journey Steps and Metrics in a Journey Map

- Journey Steps can be associated with Metrics



Steps & Metrics Style

Journey Steps

- Visited Website *Neutral*
- Submitted completed fo... *Positive*
- Submitted incomplete f... *Negative*
- Opened acknowledgment ... *Positive*
- Opened reminder email *Positive*

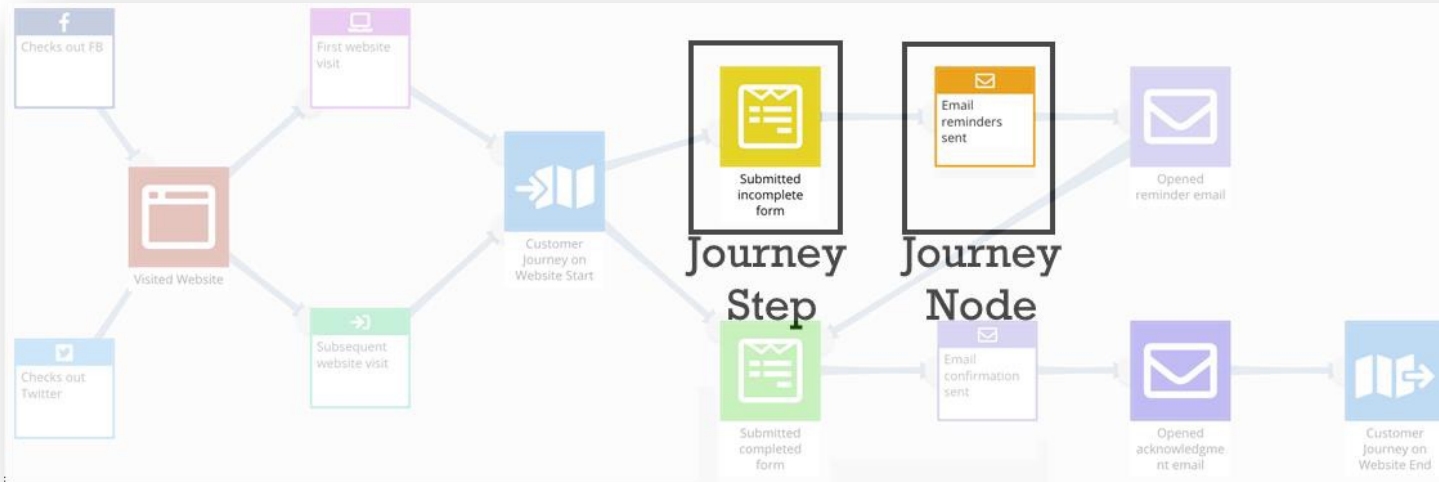
All Metrics For Journey i

Environment: default

- acknowledgment emails sent * 14
- First visit * 14
- Reminder emails sent * 19

What is a Journey Node?

- Note: Different from a Journey *Step*
- In the sample journey map, there are some nodes that are not journey steps
- Journey nodes are used to represent other activities a customer could be doing but not considered as key business milestones
 - Journey nodes could also be used to represent points where a customer should be pushed into a different journey or be served a "best next action"



Question

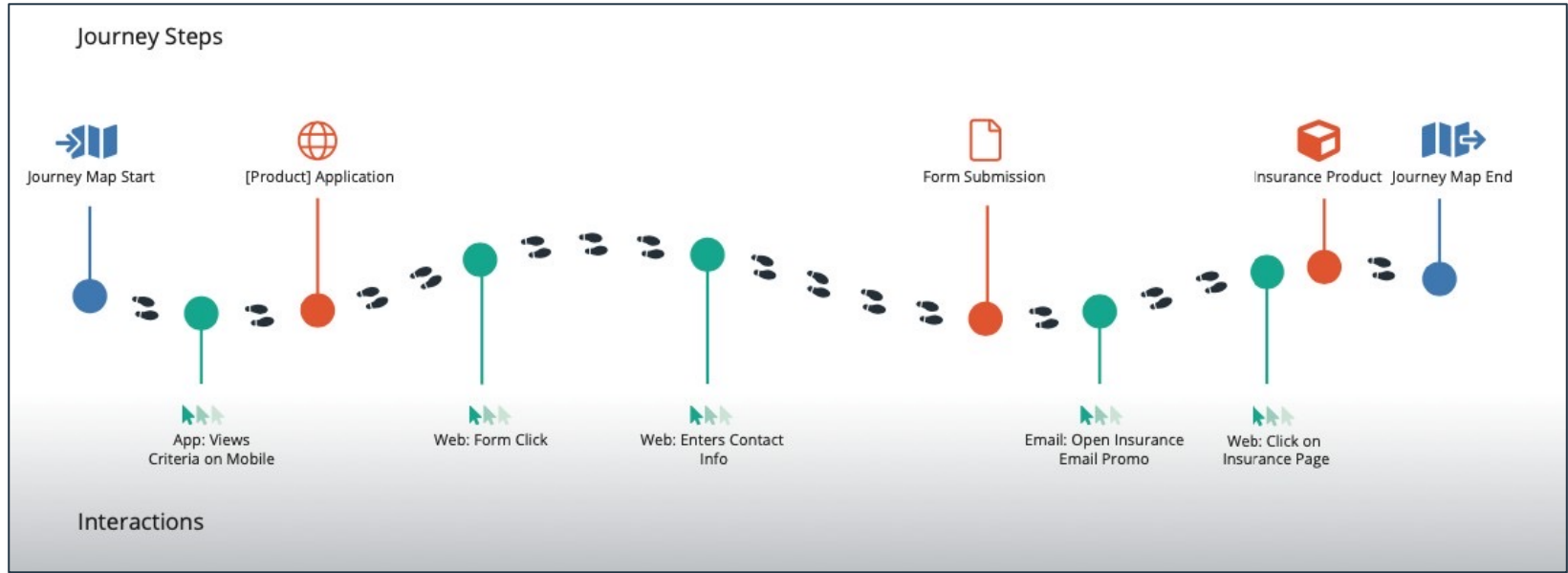
What else can we use for analytics?

How are Interactions Different from Journey Steps?

- An Interaction is defined as atomic level activities that are channel-specific
 - These activities, while important to track, are minor in relation to Journey Steps
 - Example: Views site on web, clicks button on mobile
- Like journey steps, when we create Interactions, we must always think about what data will be used to populate these
 - For example, an interaction called “Opens Email” would require Kitewheel to have access to email channel and data from your organization’s email tool such as Salesforce or Mailchimp

Journey Step vs Interactions

Example



Translating from Paper to the Journey Orchestration Hub

Creating an Interaction and Engagement Score

- An interaction can be created in the Profile Metadata tab under Project Settings
- Assign a score based off the importance of the event
- Associate the interaction to a channel

Active Version
Current

Profile Metadata

Interaction Types

Name	Description
blur	Web form field completed
bounce	Email bounce
click	Web click
direct message	Tweet direct message
form submit	Web form is submitted
like	Tweet like of content

Add Interaction Type

Name

Description

Channel

Add Channel

Engagement Score

Add Channel

Name

Question

What is a Customer Profile?

What is a Profile?

- A Profile is defined as all the identifiers and attributes of a customer that is traveling throughout your journey orchestration
- Examples of a Profile
 - **Identifiers:** email address, social security number, account number
 - **Attributes:** new account, existing account, have been in email campaign [x]
 - **Journey Steps:** has done Journey Steps A – D
 - **Interactions:** has done Interactions 1-5

What is a Profile?

Identifiers

- Identifiers are often the first things associated with a Profile and the values for these identifiers should be unique
 - In Journey Discovery Analytics > Individual Profile, you can understand whether a profile has a stored identifier (known vs unknown) but by data privacy regulations, Xponent will not display the actual values
 - By default, every Profile will have a XWID (Xponent ID) associated
- A Profile can have 1 or more identifiers of different types
 - It can also have multiple identifiers of the same type, such as different email addresses but it is the same person

```
8  "identifiers": [  
9    {  
10     "idType": "kwCookie",  
11     "identifier": "66ce82e0-c999-11e9-8fdb-b5afc5d608c1"  
12   },  
13   {  
14     "idType": "KWID",  
15     "identifier": "5dc890879b00b81886f6e32a"  
16   },  
17   {  
18     "idType": "email",  
19     "identifier": "cindy@gmail.com"  
20   },  
21   {  
22     "idType": "email",  
23     "identifier": "test@gmail.com"  
24   },  
25   {  
26     "idType": "KWID",  
27     "identifier": "5dc8ac82850ac4c01fcfaf08"
```

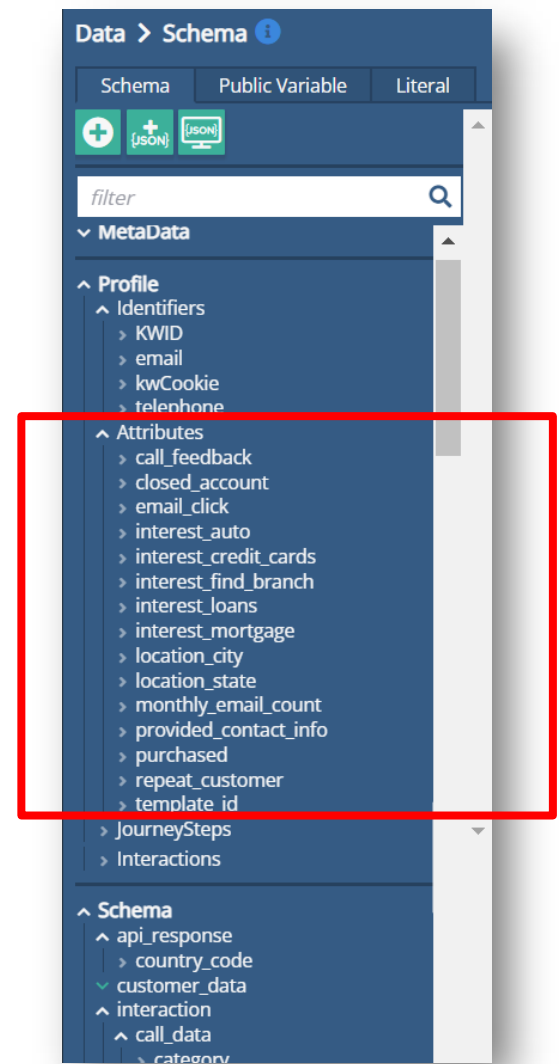
Identifier Types ⓘ		Add Identifier Type
Name ▾	Description	
KWID	Kitewheel ID	
Account Number	Someone's Account Number	🗑️
Email Address	Someone's email address	🗑️

« 1 - 2 of 2 »

What is a Profile?

Attributes

- Attributes is often defined by a Profile's characteristics (descriptive metadata)
 - As an example, attributes for this journey are *"interest_auto"* and *"repeat_customer"*
 - These can be considered as attributes because the values associated with them are not uniquely identifying a person



What is a Profile?

Journey Steps and Interactions

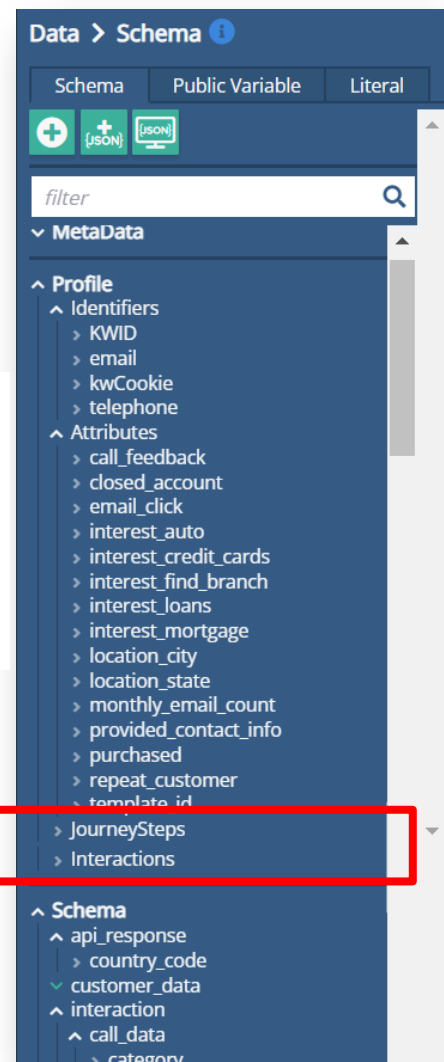
- Journey Steps and Interactions will be included in the profile, along with the Identifiers and Attributes

Interactions:

```
[ { "channelTypeText": "web",  
  "timestamp": "2019-11-18T14:07:50.984Z",  
  "interactionTypeText": "view",  
  "engagementScore": 20,  
}, {  
  "channelTypeText": "web",  
  "timestamp": "2019-11-18T14:07:55.984Z",  
  "interactionTypeText": "blur",  
  "engagementScore": 20,  
}, {  
  "channelTypeText": "web",  
  "timestamp": "2019-11-18T14:07:56.287Z",  
  "interactionTypeText": "formSubmit",  
  "engagementScore": 50 } ]
```

Journey Steps:

```
[ { "timestamp": "2019-11-18T14:07:56.022Z",  
  "journeyStepTypeText": "Visited Website"  
}, {  
  "timestamp": "2019-11-18T14:07:56.262Z",  
  "journeyStepTypeText": "Submitted incomplete form"  
} ]
```



Profiles Across Projects

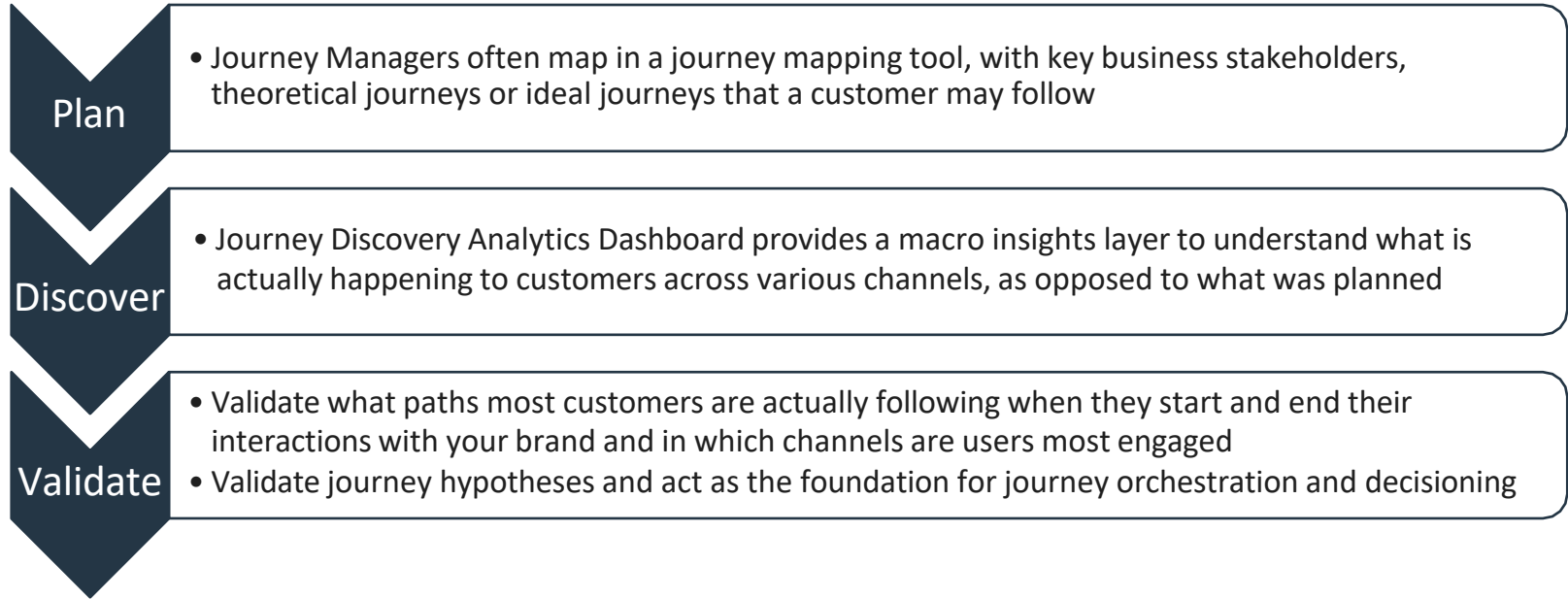
- Attributes for a Profile are shared across projects within an organization
 - (ie: interest_insurance, email_template)
- Journey Steps and Interactions are specific to a project.
 - In other words, if you record interactions/journey steps in project A, then when you retrieve the profile in project B, the interactions/journey steps will not appear in analytics
 - So, if we want to see customers going from one journey to another, we would need to build the journey within the same project in the hub.

Question

How do we read the analytics page?

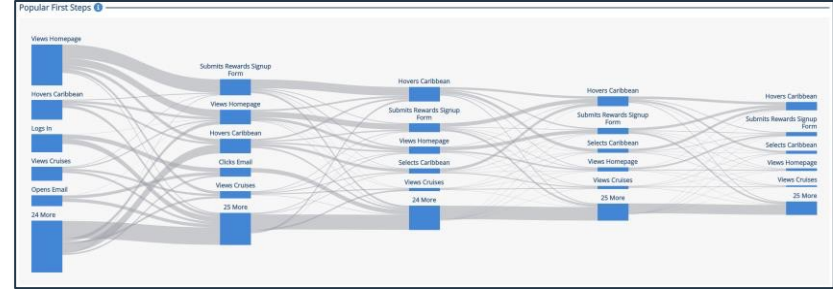
Why Use Journey Discovery Analytics Dashboard

Strategy & Planning with Journey Discovery Analytics



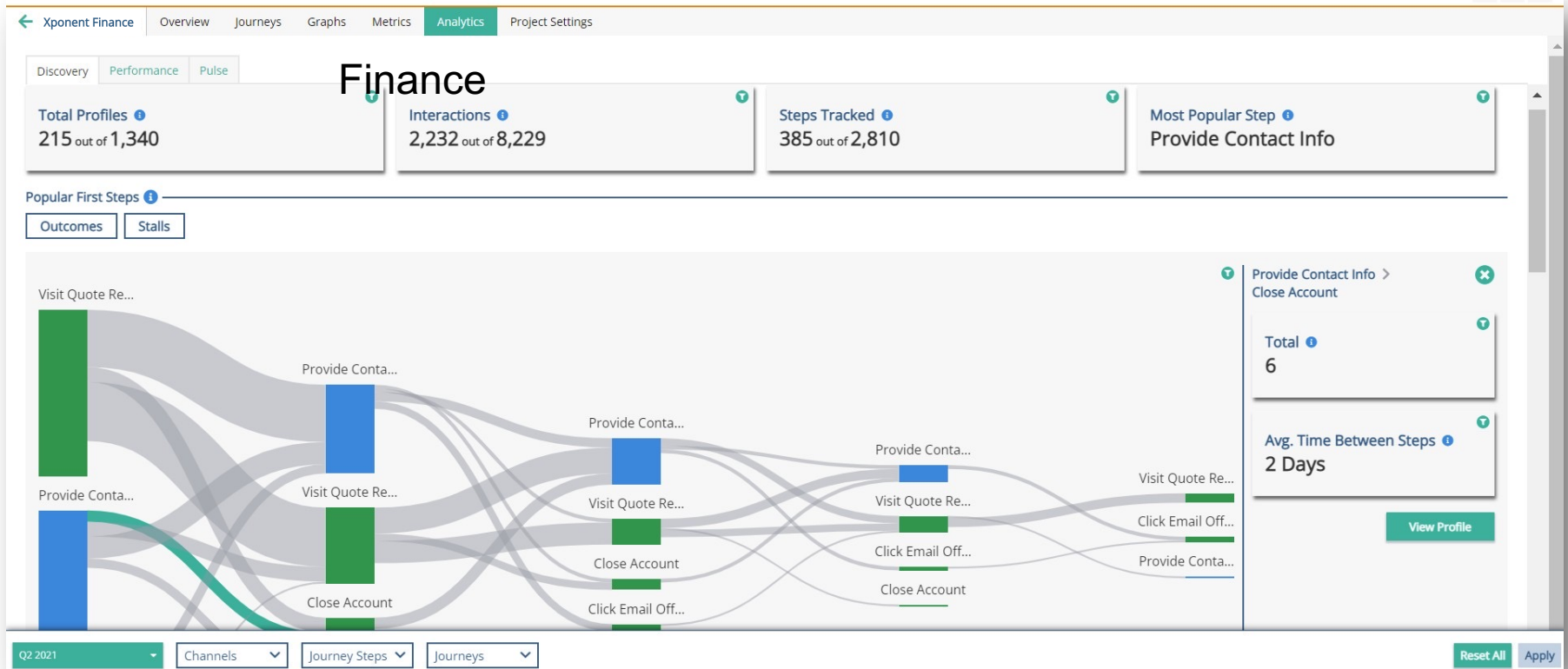
Journey Discovery Analytics

- 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.



Journey Dashboard Analytics

Discovery



Journey Dashboard Analytics

Discovery – Sankey Profile Insights

Active Journeys ⓘ

Journey Status

Manage Communications ✔

← Xponent Finance Overview Journeys Graphs Metrics **Analytics** Project Settings

Discovery Performance Pulse

General ⓘ

KWID ⓘ

60f4aafc258283eb1e3b8294

Identifiers ⓘ

Identifier	Status
email	Stored
kwCookie	N/A
telephone	Stored

Channels ⓘ

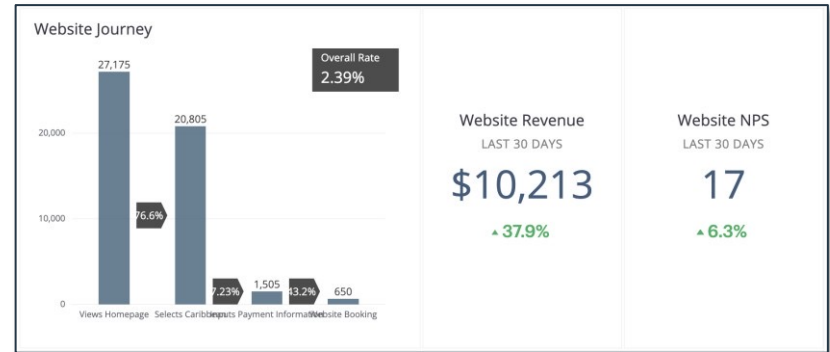
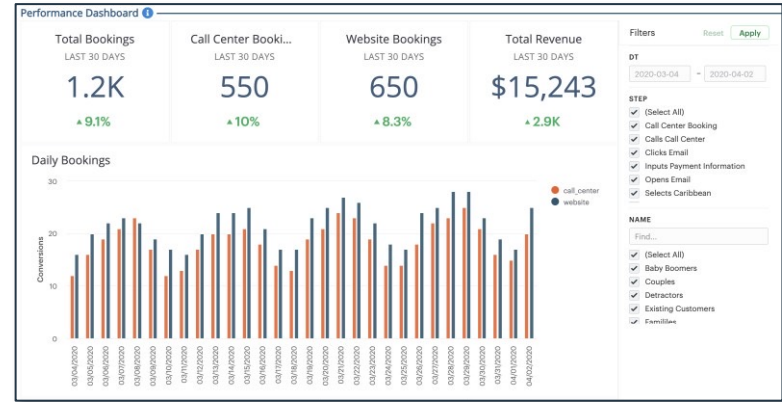
Channel	Percentage
mobile	54%
ecomm	36%
web	9%
email	1%

← Prev Profile Next Profile →

[View Attributes](#)

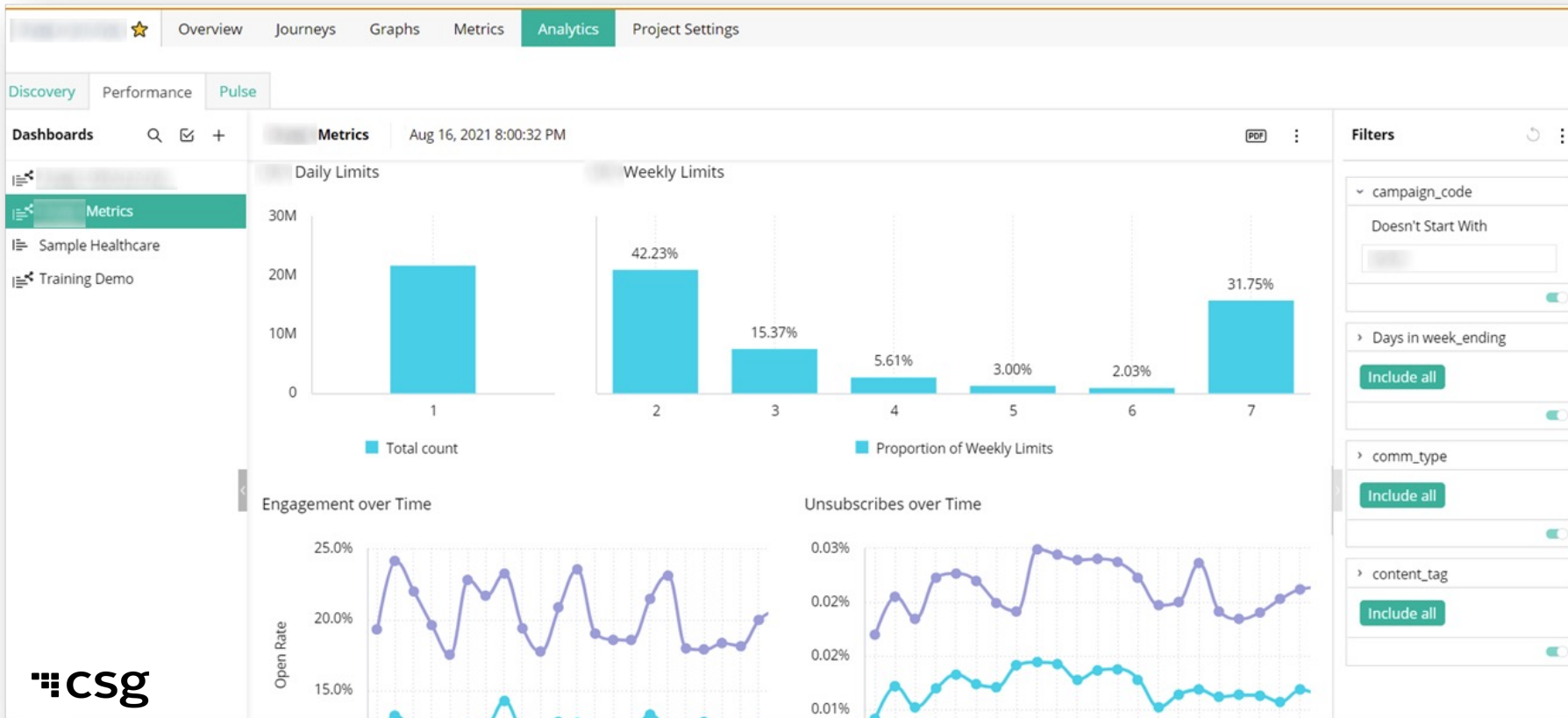
Performance Dashboard

- 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.



Journey Dashboard Analytics

Performance





Thank You

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

