



kitewheel
orchestrate great experiences

Creating a Journey Map and Introduction to Graphs

Agenda

01 Building a Journey

02 Journey Steps

03 Metrics

04 Building a Graph

05 Certification



Target Audiences

Primary

Journey Manager



Joanna, the Journey Manager

INTERESTED IN...

- Validate and challenge pre-defined notions of customer journey
- Design, measure and investigate use cases (or visions)
- ROI
- Impact on customer retention, acquisition, revenue

Configurer



Cory, the Configurer

INTERESTED IN...

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

Analyst



Alex, the Analyst

INTERESTED IN...

- Discover and investigate the Who, How, Why in order to:
 - Measure and increase effectiveness
 - Predict behavior
- Map journey performance against KPIs and benchmark

What is a Journey?

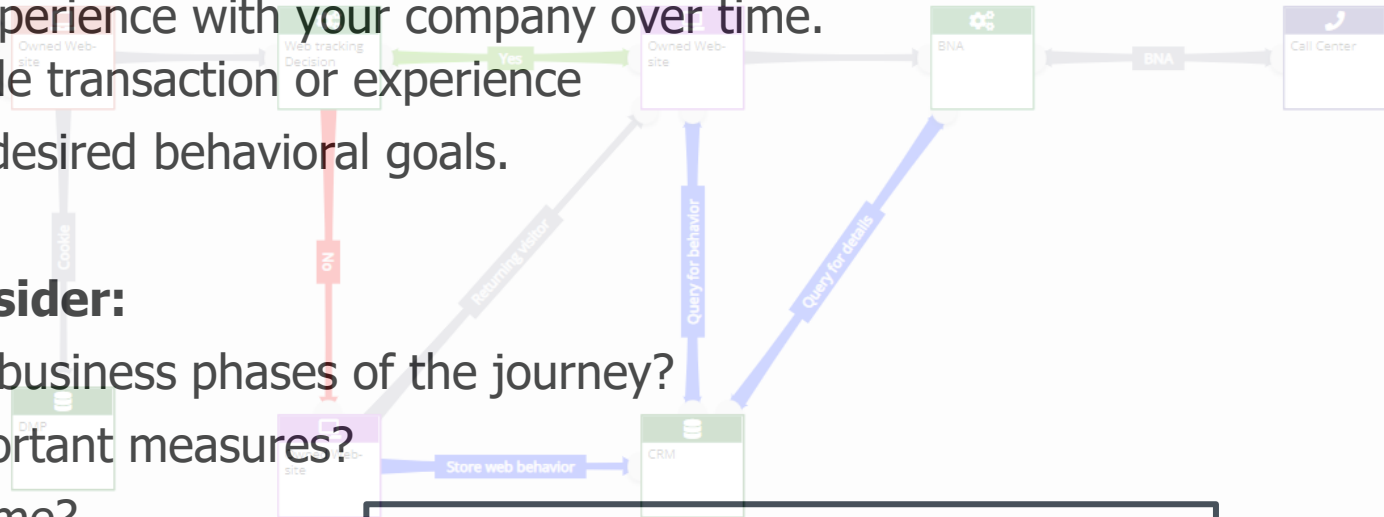
- A full customer experience with your company over time.
 - Not just a single transaction or experience
- Has one or more desired behavioral goals.

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



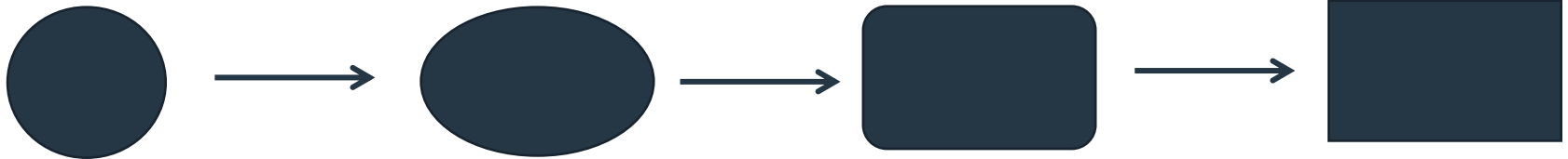
Importance of Journey Mapping

- 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



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



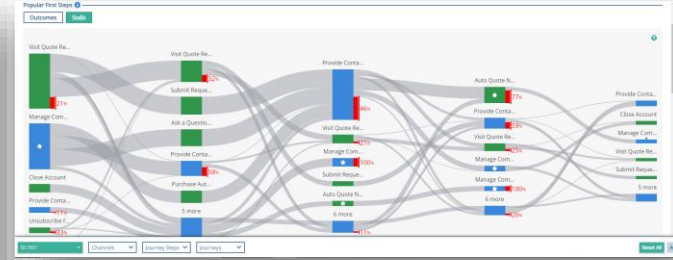
412.45k

Sample journey step

Creating a Journey Step

- In creating your journey steps, you can also define whether the journey step in question is a positive, neutral or negative result.
 - e.g., if a journey step is "leaves website" then the outcome would most likely be tracked as "negative" in Outcome.

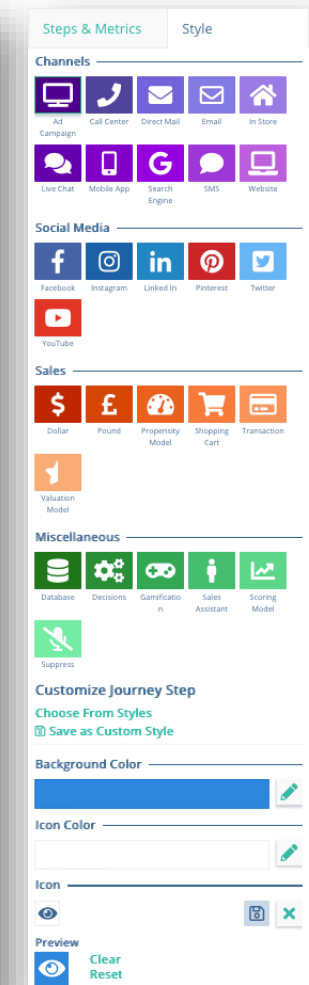
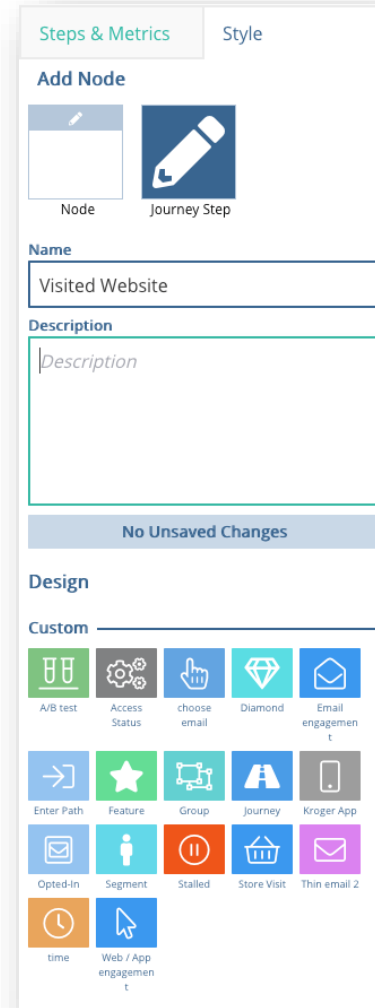
Name	Outcome & Metric	Parameters	Description	Associated Graphs
Ask a Question About Auto Insurance	182			handle othe... track call ev...
Visit Quote Request Page	641 visit page		visits auto loan page	handle auto...
Click Email Offer Link	47 interested in o...		clicking email link	02 Email Eve...
Close Account	148 Close account		customer closes account	handle othe... track call ev...



The outcome label for a journey step will be seen in the JDA Dashboard

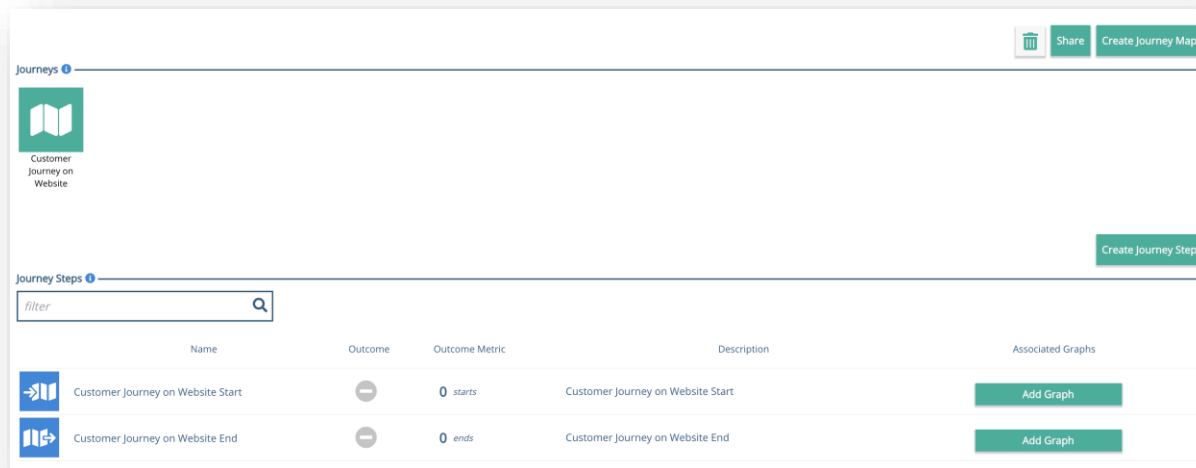
Creating a Journey Map

- Login
- Create a new Journey Map
- Add journey steps and nodes to the graph
- Kitewheel 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 displays the 'Journeys' section of the Kitewheel interface. At the top right, there are buttons for 'Share' and 'Create Journey Map'. Below this, a card titled 'Customer Journey on Website' is shown with a map icon. A 'Create Journey Step' button is located to the right of the card. Underneath, the 'Journey Steps' section features a search filter box. A table lists two journey steps:

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

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

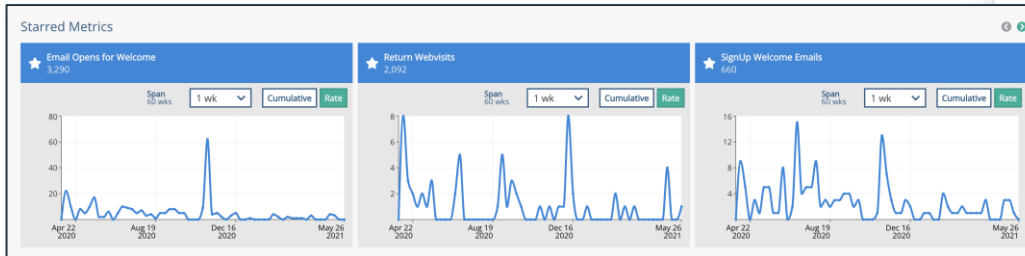
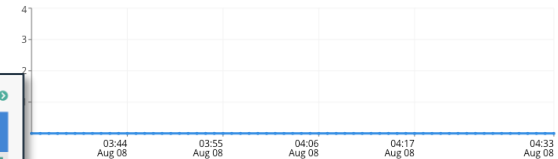
default

Span

1 min

Cumulative

Rate



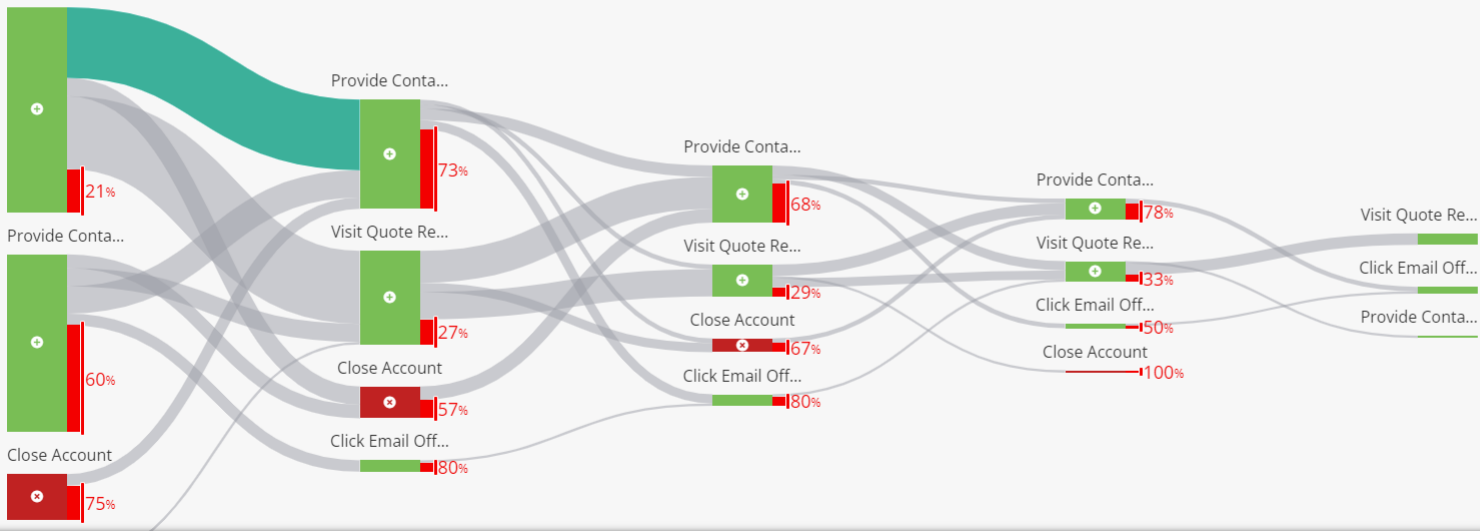
Metrics & JDA

Discovery Performance Pulse

Popular First Steps

Outcomes Stalls

Visit Quote Re...



Visit Quote Request Page > Provide Contact Info

Total 31

Avg. Time Between Steps 43 Min

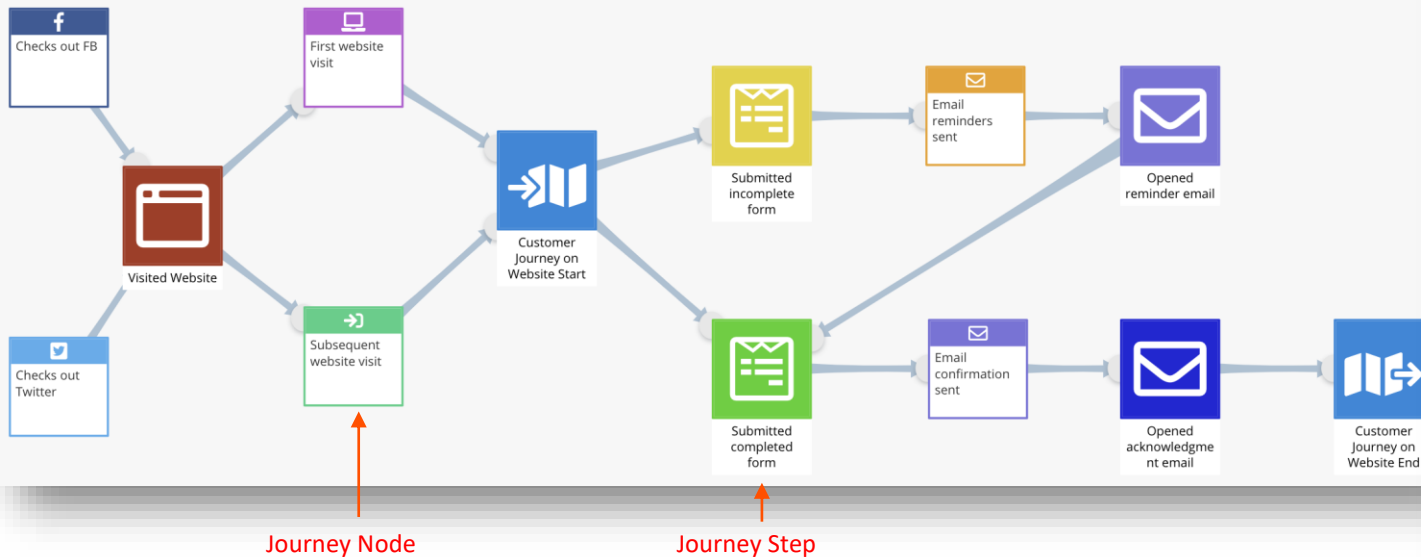
View Profile

Q2 2021 Channels Journey Steps Journeys

Reset All Apply

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
- Email reminders sent
- Opened reminder email
- 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"



Keep In Mind

- If the graph is grey – unlock the journey map
- If the graph is blank or stuck on loading – you may need to refresh
- To save the map, use the zoom controls and take a screenshot

The screenshot displays the Kitewheel Journey Map interface. The main area shows a journey map for 'Auto Insurance Nurture' that is currently greyed out. A red arrow points to a 'Release Lock' button in the bottom right corner of the map area, with the text 'Click to unlock' above it. The interface includes a top navigation bar with tabs for 'Overview', 'Journeys', 'Graphs', 'Metrics', and 'Project Settings'. A right-hand sidebar contains sections for 'Steps & Metrics', 'Journey Steps', and 'All Metrics For Journey'. The 'Journey Steps' section lists various actions such as 'Open Auto Quote', 'Visit Homepage', 'Click Email Follow', 'Unsubscribe from', and 'Abandon Auto Lo'. The 'All Metrics For Journey' section shows 'Environment' set to 'default' and 'auto loan offer email clicks' at 0. A tooltip at the bottom of the map area indicates 'Currently Being Edited By: Bridgette Crowley <bcrowley@kitewheel.com>' and includes a 'Release Lock' button.

Question

What else can we use for analytics?



What is an Interaction?

- Any action taken by a consumer in a physical channel
- When creating an Interaction Type, you define the channel in which they occur and the individual engagement score for that Interaction Type.

Once an interaction type is defined, you can select it in a dropdown menu via the SaveInteraction Node.

Profile Metadata ⓘ

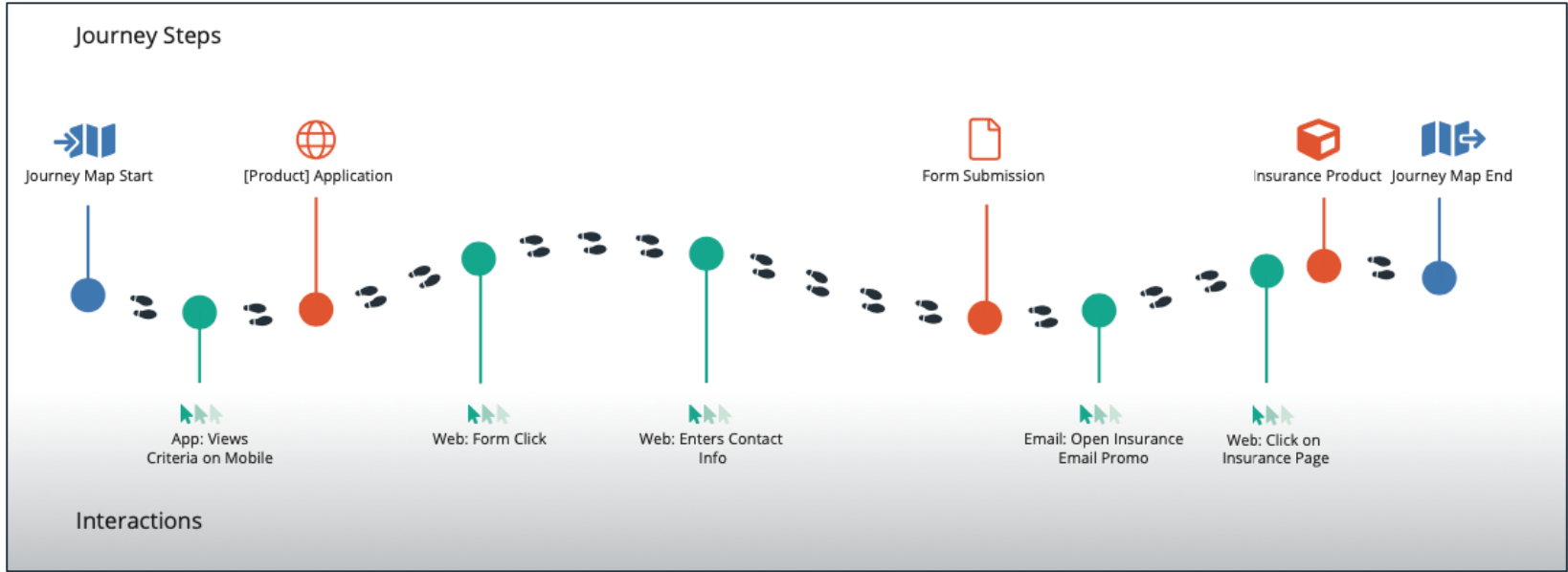
Interaction Types ⓘ

Name ▾	Description	Channel	Engagement Score
blur	begins to fill out form	web	2
call	calls call center	call center	2

The screenshot shows the 'Edit Save Interaction' interface. At the top, there are buttons for 'Edit', 'Remove', and 'Validate'. Below these is a flowchart with two 'Save Interaction' nodes. The top node is connected to a 'Return true' node. The bottom node is connected to the top node via an 'AND' connector. A dropdown menu is open, showing a list of interaction types: 'email interaction [email]', 'blur [web]', 'call [call center]', 'changes auto loan form [web]', 'changes email frequency [web]', 'click [web]', 'completes auto loan form [web]', 'email interaction [email]', and 'unsubscribe from email [email]'. The 'email interaction [email]' option is selected.

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

Hands-On: Create a Journey Map!

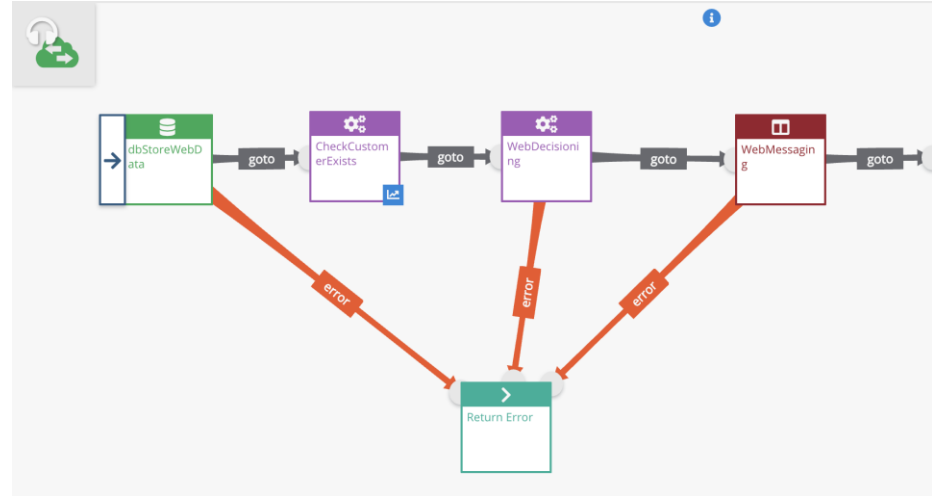


Introduction to Graphs

Getting Started with Graph Building

What is a Graph?

- A graph is a series of nodes connected by links
- Nodes return values and can update “memory” locations
- Links are traversed in the following order:
 - Error – always first
 - Conditional if true
 - Goto – must have one
- Nodes can be adaptors or business logic
- Every graph has to have at least one Return Node
- Only valid graphs can be executed

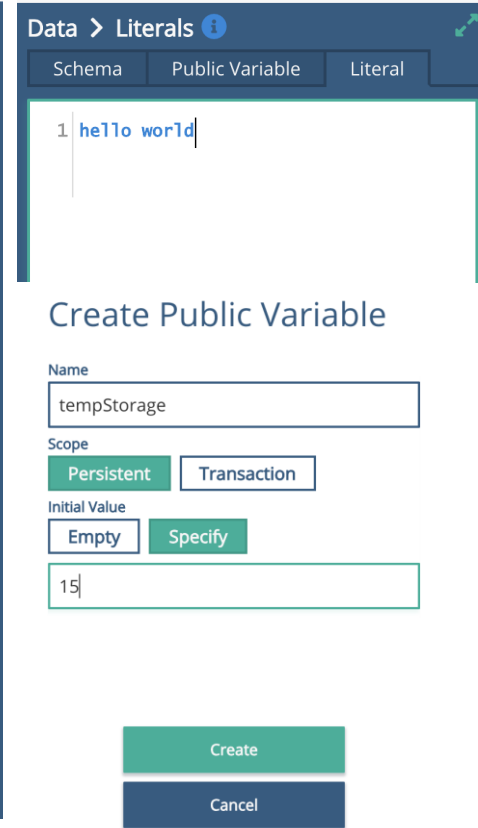
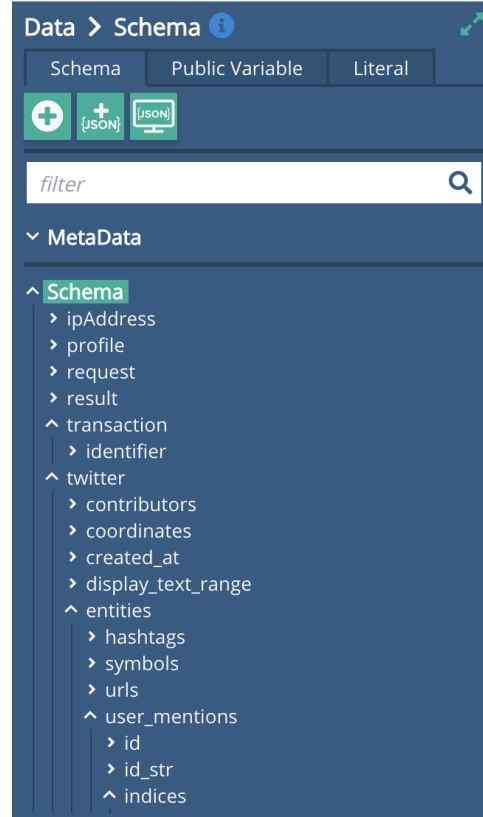


⚠ All links must have types and all nodes must be configured for a graph to be valid

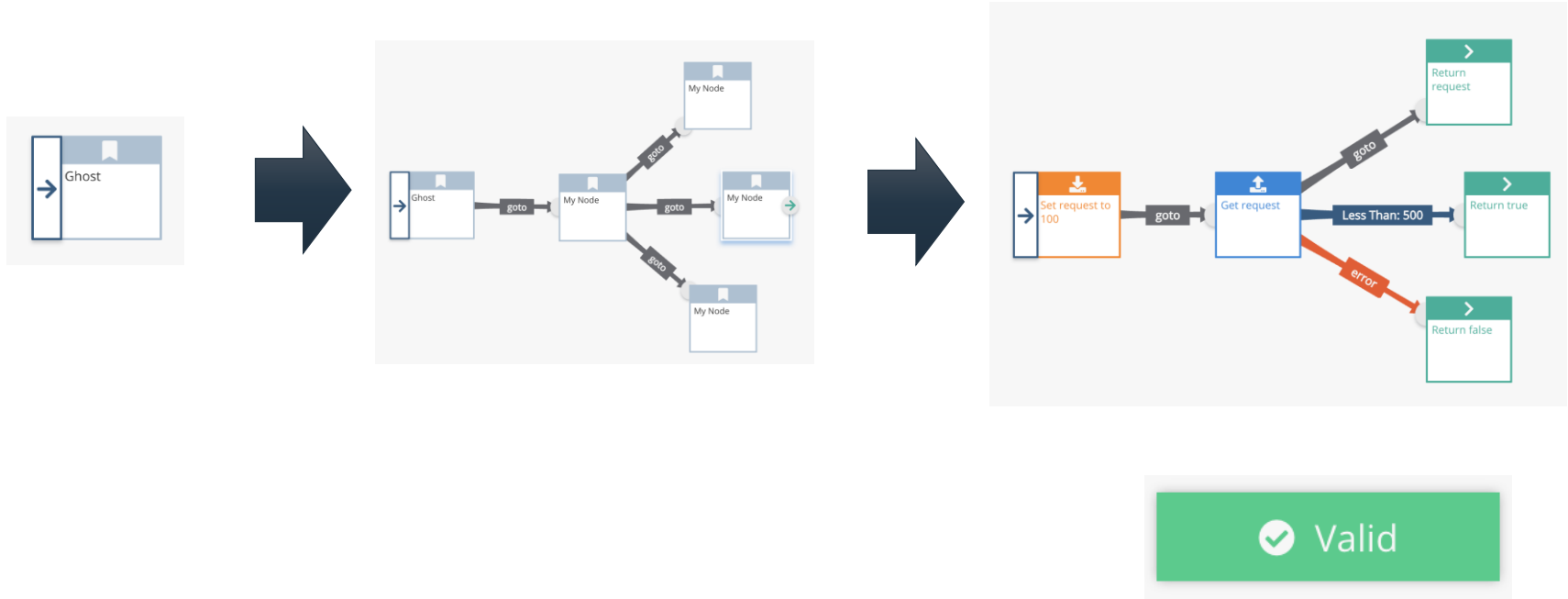
! Invalid	
Invalid data attributes on node(s)	(1)
Graph(s) contain ghost node(s)	(1)
Node(s) contain multiple 'GoTo' link(s)	(1)

Data – JSON and the Arguments

- Kitewheel has three main ways of working with data in a graph:
 - Schema – JavaScript Object Notation (JSON) data store
 - Public Variable – a named memory location that exists for the life of the graph or can persist
 - Literal – a valid JavaScript constant
- Most nodes use one or more of these for input and output
- Familiarise yourself with JSON
- Use [jsonLint.com](http://jsonlint.com) or other online tools to validate your JSON



Create a Minimal Graph – Set, Get & Return



◀ The minimal valid graph is just a Return Node

Test Your Graph

- Bring up the Testing Console
- Testing console appears for Valid Graphs only
- Hit Start and wait for the Testing Settings window
- Test Modes:
 - Iterations
 - Duration
 - Data – JSON

Visual Test Settings

Testing Mode

Iterations

Duration

Data

⚠ All graph executions have a maximum runtime of 30 minutes

Iterations (1 - 1000 Max Count)

1

Testing Console ⓘ

Listen starting ...

Transaction 1

Node	Time	Value
📥 Set	0.820ms	true
📤 Get	0.821ms	100
> Return	0.212ms	true
🕒 Total Elapsed Time	3.891ms	

📄 Data Store Values Expand All 👁 Schema JSON

Graph Nodes

Base Nodes



Ghost



Get



Set



Return



Loop



Comment



Update
Profile



Save
Interaction

Logic



2D Table



Decision Tree



Columnar Table



JavaScript

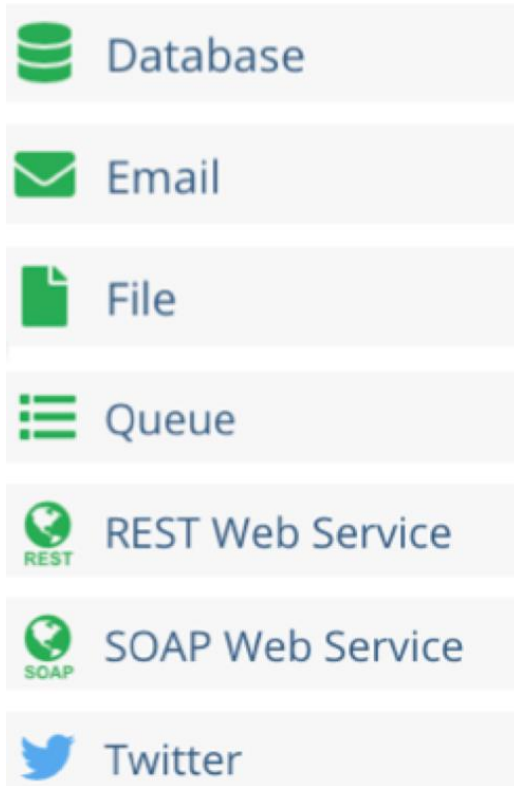


Conditional



R Script

Connections and Adaptors



- Connections define the base connection information
- Connections are created in the Project Setting tab
- Adaptors use the connection information for a particular method
- Adaptors are created in the Graph Editor
- Kitewheel API turns any graph into a web service
- Kitewheel API supports web tracking and web recommendation

Creating a Connection

- You need to be an Owner to get to the Admin Screen for the project
- An Environment is a collection of connections in which your project's graphs and journeys will execute
- The default Environment is called "default" (development)
- New connections may require credentials or OAuth keys
- Connections have to be saved and can be tested


Create Connection

Type
Database

Name
Connection Name


Create Connection


Cancel


Active Version
Current  Version

Connections

Filter By:
 All Environment Tag

filter 

Database 

myDB 

development

Certification

Journey

- What is a journey?
- What is a journey step?
- How to create and use journey steps?
- What is a metric?
- How is a metric created?
- How is a metric associated with a customer journey?
- How is a goal set?

Certification

Graph

- What is a graph?
- What is the difference between a journey and a graph?
- How is a metric associated with a graph?
- How do I test my graph?
- What is the schema?
- How does the schema differ from a public variable?

Thank You