



Xponent Identity Manager

Agenda

- 01 Terminology
- 02 Xponent Identity Manager
- 03 Cross-channel Profile Identification and Merging
- 04 Data collection in Graphs
- 05 Feeding into Analytics
- 06 Certification questions



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

Terminology

Journey	Prospect or Customer experiences with the Brand, on their owned properties (website, social media presence), with their messaging (email, SMS, push, physical mail) and the crafted path the Brand takes the user on towards a goal
Profile	Data record to represent a recognized prospect or customer. A Profile is a collection of Identities , Attributes , Journey Steps and Interactions
Journey Map	Visual representation of the customer journey that describes the Journey Steps and direction the user will take to move towards the journey goal
Identity	A unique identification string (or number) that is associated to the profile. It can be linked to more than one profile
Attributes	Key values that define the profile and could change in the future- their name, address, their status/ level
Journey Steps	A profile's action or in-action or the brand's decision that is of interest to the Journey
Interactions	All actions, whether important or not to the journey, captured along with the time and channel where they happened
Context	Additional details relevant to the interaction, journey step that can be analyzed later on
Metrics	Counts of transactions, users, monetary value linked to an action or a complex calculation based on existing metrics. These are not unique and are not linked to profiles
Engagement Score	Scores linked to interactions that are totaled for each profile and indicate how engaged and satisfied a customer is

What constitutes a Profile?

Attributes

Sara Knight

AGE 26
LOCATION AUSTIN, TX

MARITAL STATUS SINGLE
KIDS NONE
LIVING 2 BR APARTMENT

OCCUPATION IT SPECIALIST
SALARY 41K
EDUCATION BACHELOR'S

ABOUT SARA
Sara Knight has been living with her roommate, Julia Palmer, for 2 years. Sara is a hardcore gamer and has a lot of electronics, including multiple game consoles and computers. Sara prefers to stay home most nights and usually watches television or streams herself playing video games online. Julia is more social and prefers to go out to bars or hang out with friends. The girls each pay half of the bills, although they both know that Sara's room most likely consumes more energy than Julia's room. Julia has asked Sara in the past to try and become more energy conscious to keep their bill low.

HABITS

- Sara is forgetful and often leaves her tv, game consoles, or computers on for long periods of time.
- She usually has several electronics on at once, such as watching television and playing video games at the same time.
- Sara frequently keeps the A/C on because her room becomes hot from running all of her electronics.

MOTIVATORS

- Sara doesn't want her roommate to pay more than her fair share of the energy bill.
- Leaving her electronics on for too long may cause them to overheat or become damaged.

GOALS

- Lower monthly bills
- Reduce the amount of energy that Sara personally uses

Identifiers

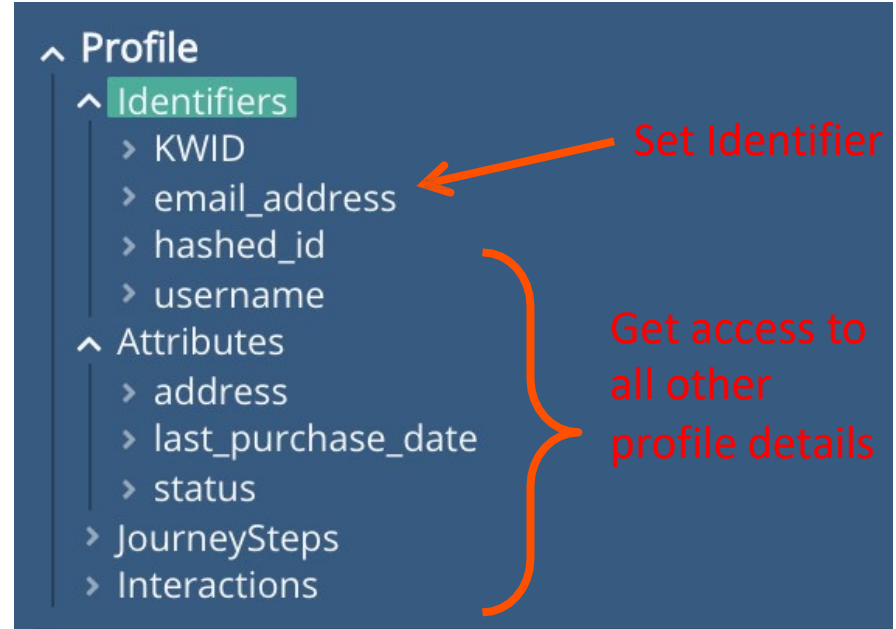
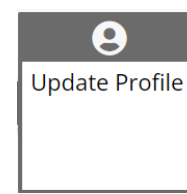
Sarah@gmail.com		
ID	KWD	12bde46ae444f77f
Cookie	lovCookie	70bde46ae104f55f
Analytics visi...		70bde46ae104f55f
Country		
City		
Browser	Chrome 47.0	
OS	Windows 8.1	
Device	Desktop	



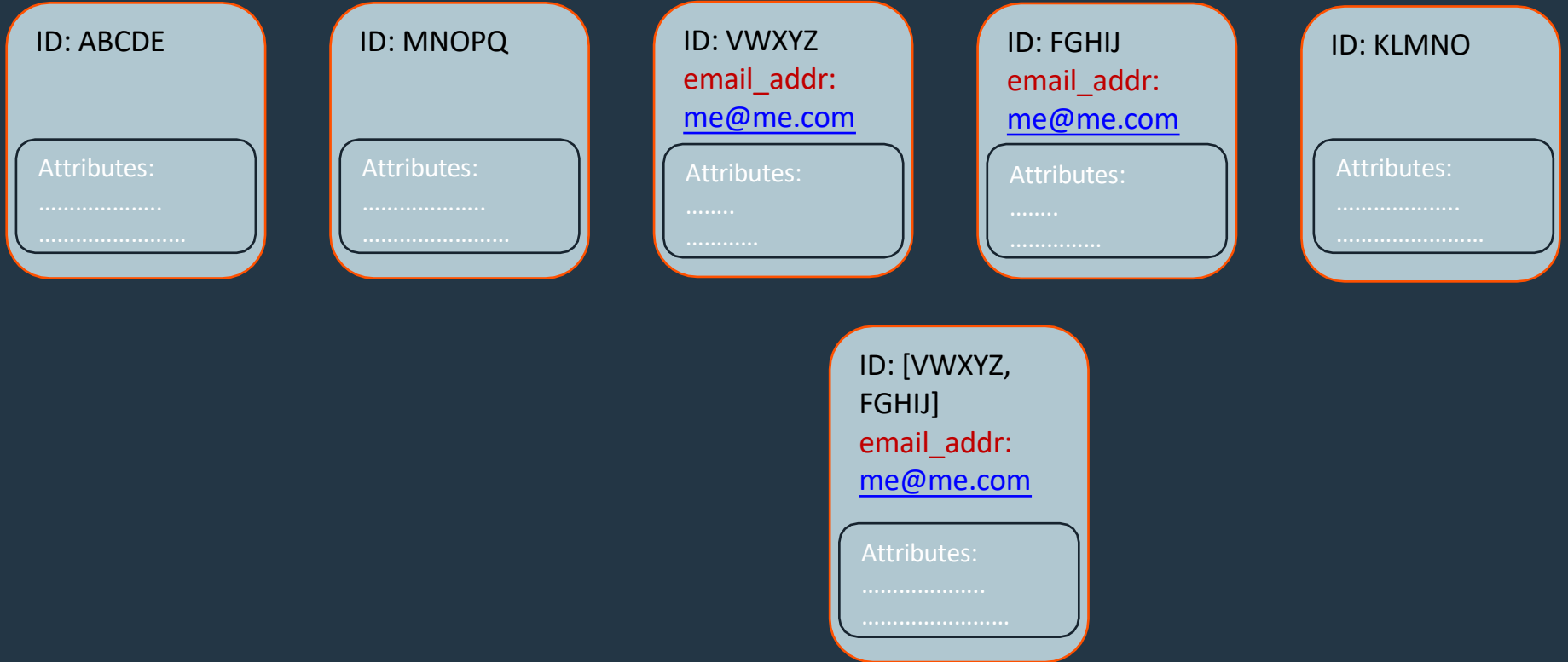
Journey Steps and Interactions

Identity Manager Basics

- When a transaction comes in, we first try to find the profile using the available identifier
 - If the profile exists, it will be returned
 - If the profile with this identifier does not exist, it will be created
- If the profile exists, you will have access to its attributes, recorded journey steps and interactions to use in decisions
- Attributes can be added and the profile can be updated
- Journey Steps and Interactions can be recorded for the profile- there is no limit to how many can be recorded in a single transaction



Cross-channel Profile Identification and Merging



Profiled Merged

- Xponent ID Manager will merge Profiles if there is more than one Profile that share an identifier
 - The resulting Profile will return the merged set of identifiers
- The Attributes from the Schema are merged into a single profile
 - Integer and Floating Point - newest is kept
 - Strings - newest is kept
 - Arrays - result values are chosen from the first array in which the value occurs
 - Objects - newer keys are kept, new keys are merged
- All Journey Steps and Interactions for all the Profiles are combined into a single list

Profiles Merged Example

Identifiers:

"kwCookie": "e746d330-0645-11ea-9837-a5a3f29e14e2"

"KWID": "5dcc4fb56295004e450c7865"

"kwCookie": "7fed4e30-0645-11ea-ac77-3fa1b1cce38f"

"KWID": "5dcc4f266295001bcd0c785f"

"email": "tl@gmail.com"

"email": "cl@gmail.com"

Profile A, in the Profile Store

Identifiers:

"kwCookie": "a2455700-0a0c-11ea-94ac-e9e2287f01cf"

"KWID": "5dd2a56d629500fb5b0c788d"

"email": "cl@gmail.com"

Profile B, in the graph



Identifiers:

"kwCookie": "e746d330-0645-11ea-9837-a5a3f29e14e2"

"KWID": "5dcc4fb56295004e450c7865"

"kwCookie": "7fed4e30-0645-11ea-ac77-3fa1b1cce38f"

"KWID": "5dcc4f266295001bcd0c785f"

"kwCookie": "a2455700-0a0c-11ea-94ac-e9e2287f01cf"

"KWID": "5dd2a56d629500fb5b0c788d"

"email": "tl@gmail.com"

"email": "cl@gmail.com"

The resulting Profile will return the merged set of identifiers

Attributes Merged Example

Attributes:

```
"firstName": "C",  
"lastName": "Liang",  
"destination": "Asia Tours",  
"favoriteColor": ["white"],  
"visits": 7,  
"travelers": 3,
```

Profile A in the profile store



Attributes:

```
"firstName": "Cindy",  
"lastName": "Liang",  
"destination": "Laos City Breaks",  
"favoriteColor": ["red", "blue"],  
"visits": 3,  
"travelers": 5,  
"duration": "22-31 days"
```

Profile B in the graph - newer



Attributes:

```
"firstName": "Cindy",  
"lastName": "Liang",  
"destination": "Laos City Breaks",  
"favoriteColor": ["white", "blue"],  
"visits": 3,  
"travelers": 5,  
"duration": "22-31 days"
```

Merged Profile

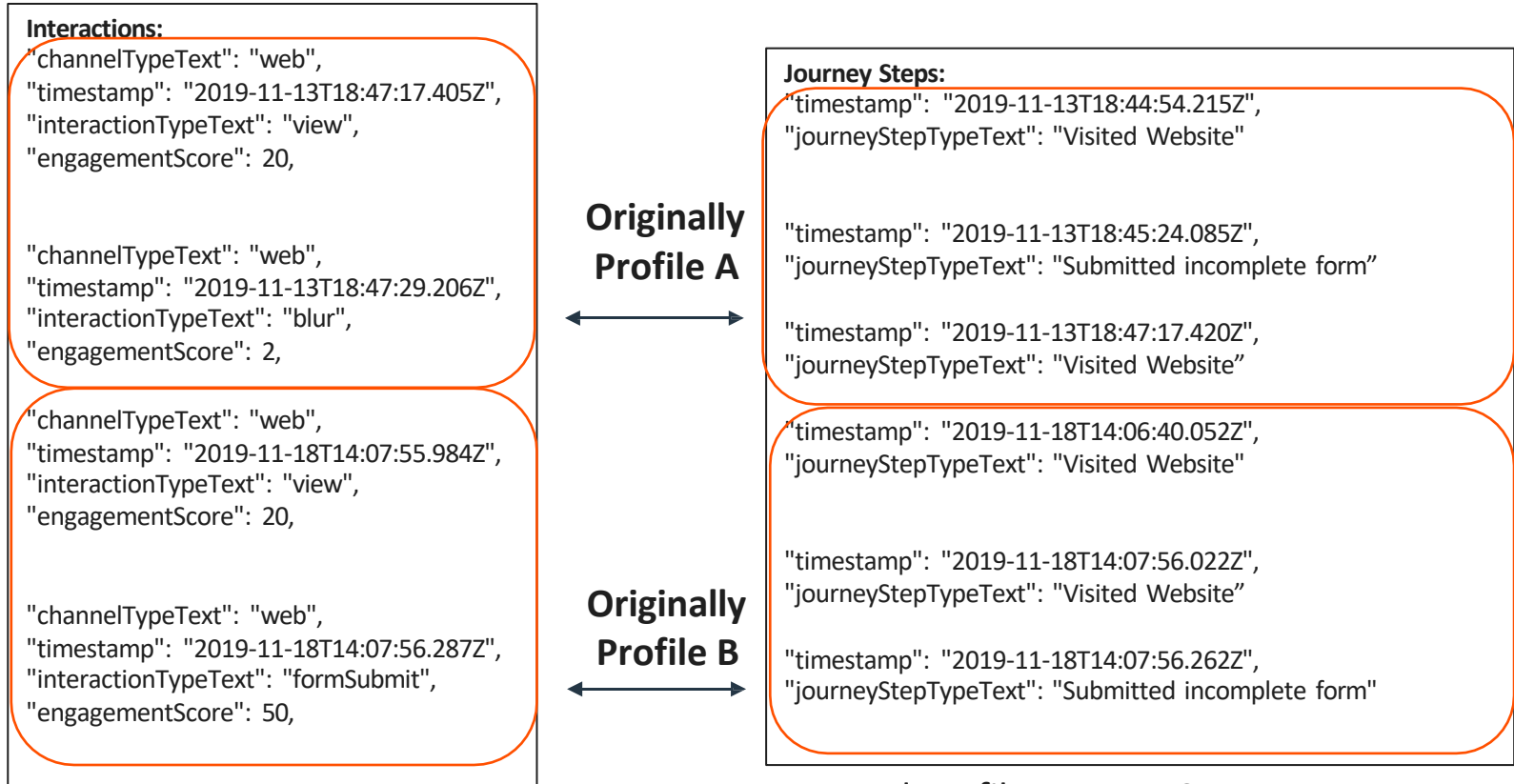
→ **Strings** - newest is kept

→ **Array Merged** – Array positions are merged- this might change

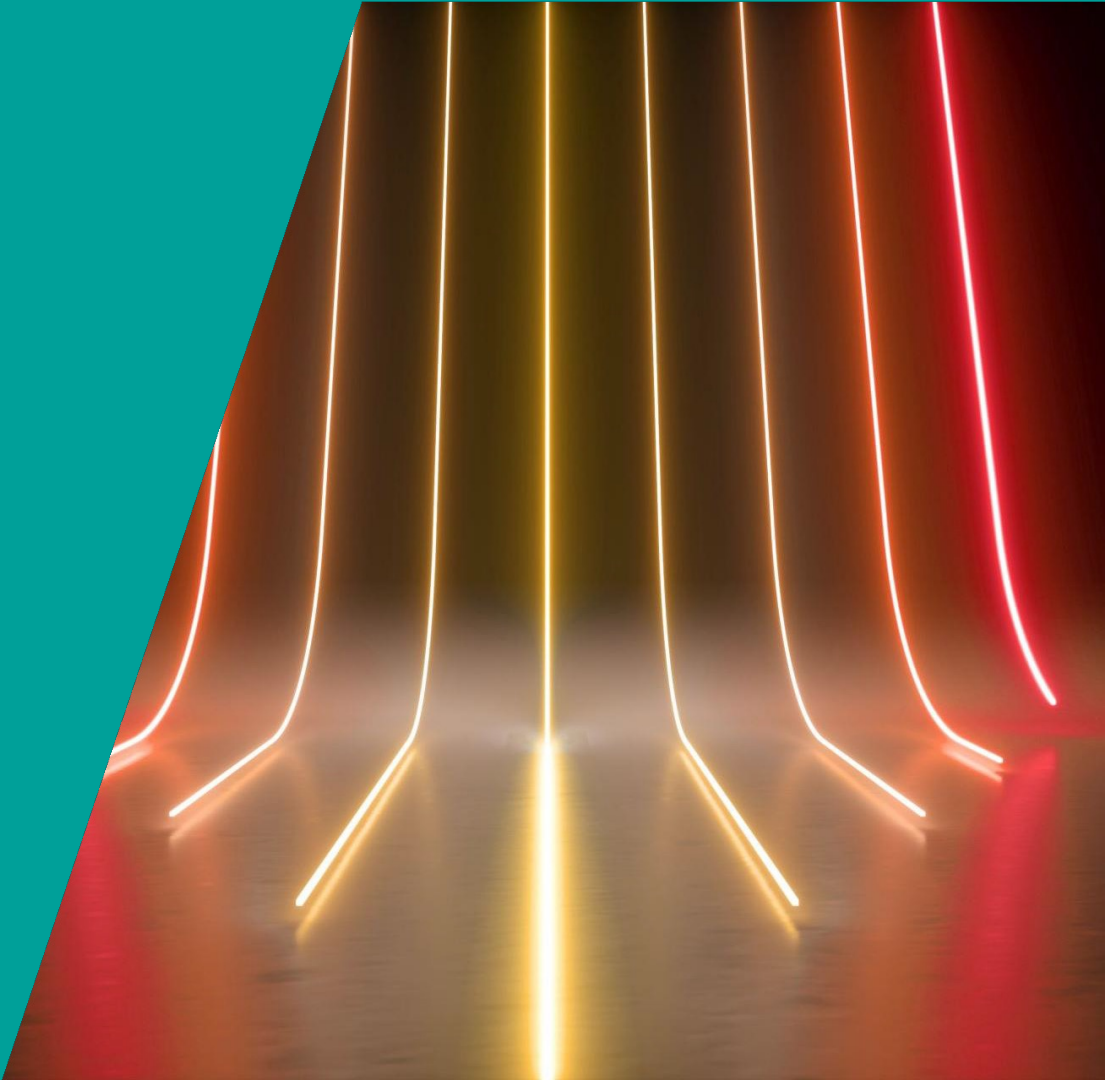
→ **Integer and Floating Point** - newest is kept

→ **Objects** - new keys are merged

Journey Steps and Interactions Merged Example

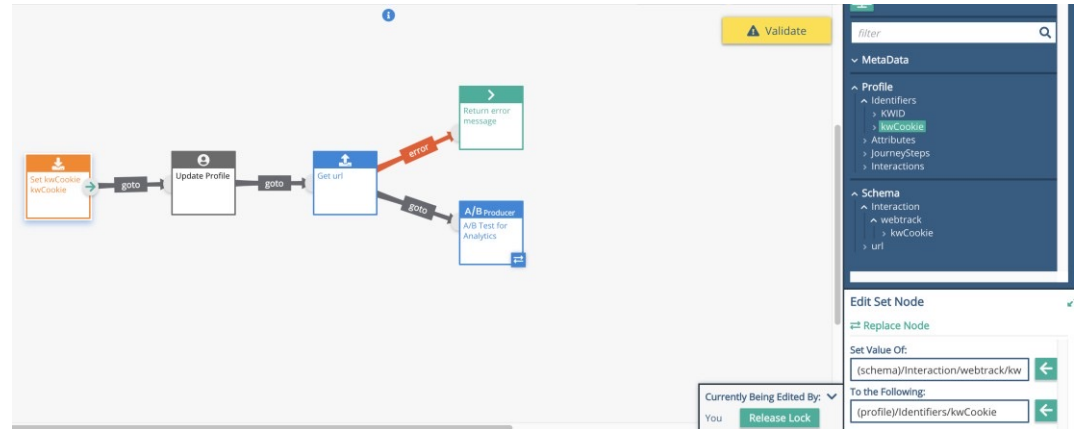


Data Collection in Graphs



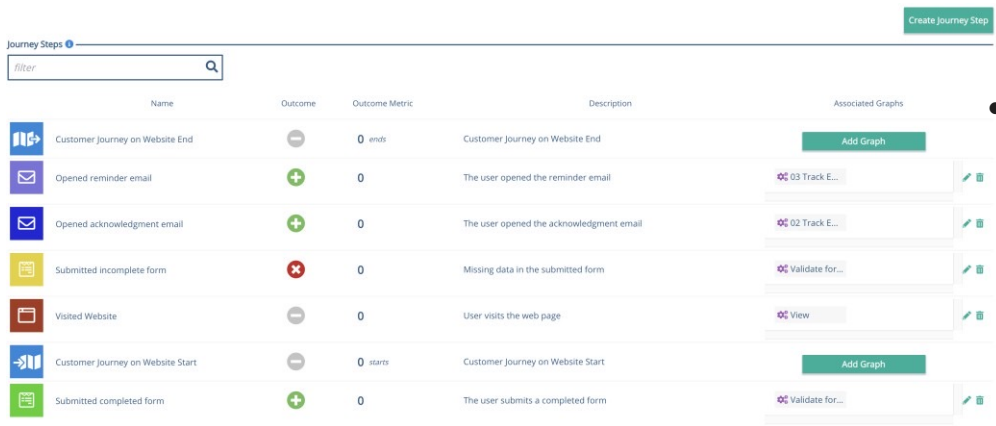
Profile Data Captured in a Graph

- The Update Profile node is used to create, update and merge profiles in a graph
- It will always return the latest IDs, attributes, journey steps and interactions on the profile whenever it is used in a graph
- The journey step and interaction nodes in a graph will also update the profile



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.



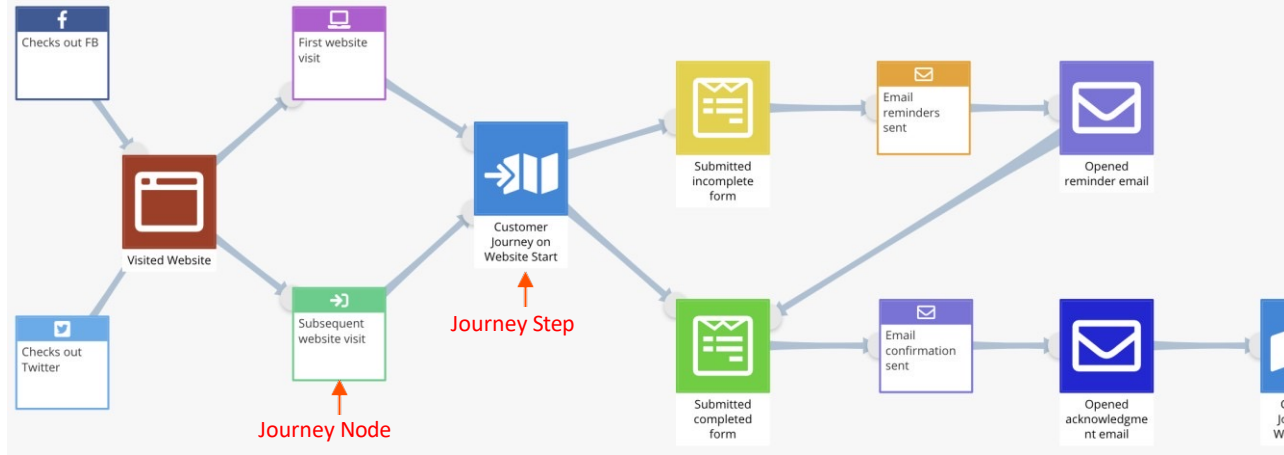
The screenshot shows a web interface for managing journey steps. At the top right is a 'Create Journey Step' button. Below it is a search bar labeled 'filter'. The main content is a table with the following columns: Name, Outcome, Outcome Metric, Description, and Associated Graphs. The table contains eight rows of data, each representing a different journey step.

Name	Outcome	Outcome Metric	Description	Associated Graphs
Customer journey on Website End	Neutral (grey minus)	0 ends	Customer Journey on Website End	Add Graph
Opened reminder email	Positive (green plus)	0	The user opened the reminder email	03 Track E... Add Graph
Opened acknowledgment email	Positive (green plus)	0	The user opened the acknowledgment email	02 Track E... Add Graph
Submitted incomplete form	Negative (red X)	0	Missing data in the submitted form	Validate for... Add Graph
Visited Website	Neutral (grey minus)	0	User visits the web page	View Add Graph
Customer journey on Website Start	Neutral (grey minus)	0 starts	Customer Journey on Website Start	Add Graph
Submitted completed form	Positive (green plus)	0	The user submits a completed form	Validate for... Add Graph

- e.g., if a journey step is "leaves website" then the outcome would most likely be tracked as "negative" in Outcome.

Journey Steps and Metrics in a Journey Map

- Journey Steps can be associated with Metrics
- Styles can be applied via the right hand rail



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

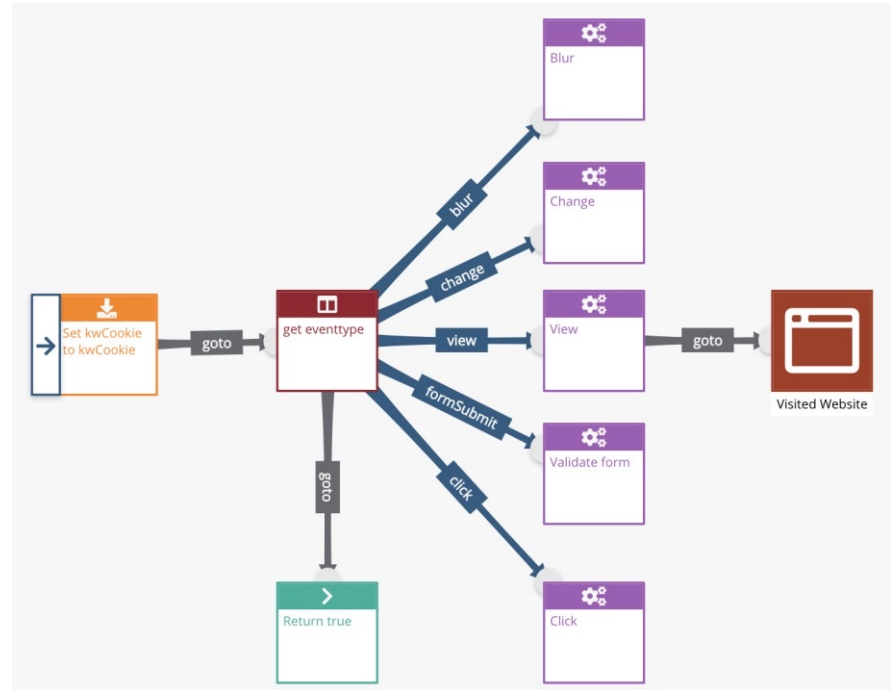
First visit * 14

Reminder emails sent * 19

Submitted website visit * 14

Journey Steps in a Graph

- All Journey Steps created are available to be added in a graph
- The datetime field is optional
 - If not specified, it will be automatically filled with the current datetime.
 - If specified, the journey step can be recorded at anytime in the past
- The context field is where additional information about the Journey Step can be saved.
 - Eg. Total Sale Amount in the JS: Completes eComm payment
 - Total Call time and call resolution status in the JS: Ended Call Center Interaction



Interactions, Channels, Engagement Score & Identifiers

An interaction type would need to be associated with a channel and engagement score

The screenshot displays a software interface with several components:

- Active Version:** Current (with a lock icon).
- Profile Metadata:** A section with an information icon.
- Interaction Types Table:**

Name	Description	Channel
blur	Web form field completed	web
bounce	Email bounce	web
click	Web click	web
direct message	Tweet direct message	Twitter
form submit	Web form is submitted	web
like	Tweet like of content	
- Identifier Types Table:**

Name	Description
KWID	Kitewheel ID
- Add Channel Modal:**
 - Name: Channel Name
- Add Interaction Type Modal:**
 - Name: mention
 - Description: Tweet mentions brand
 - Channel: web (dropdown menu)
 - Engagement Score: 10
 - Buttons: Add Interaction (yellow), Cancel (dark blue)
 - +Add Channel button (green)

Recording an Interaction

An interaction is recorded via the Save Interaction node

It will save the details of the current interaction to the Xponent ID Manager and will return the most up-to-date profile

The screenshot displays the Xponent ID Manager interface. The main workspace shows a workflow diagram with four nodes connected by 'goto' arrows:

- Node 1: 'Set kwCookie to kwCookie' (orange box with a download icon)
- Node 2: 'Save Interaction' (grey box with a save icon, highlighted with an orange border)
- Node 3: 'Opened reminder email' (purple box with an envelope icon)
- Node 4: 'Return true' (green box with a right arrow icon)

On the right side, the configuration panel for the 'Save Interaction' node is visible. It includes the following fields:

- Data > Literals** (with an info icon)
- Edit Save Interaction** (with an info icon)
- Replace Node** (with a double-headed arrow icon)
- Open in Save Interaction Editor** (with a folder icon)
- Identifiers:** `(profile)/identifiers`
- Interaction Type:** `requestBNA [Email]` (with a '+ Add Interaction Type' button)
- context (Optional):** `(Please Define a Source)` (with a left arrow icon)
- timestamp (Optional):** `(Please Define a Source)` (with a left arrow icon)

Identity Manager Feeding into Analytics

^ Profile

^ Identifiers

- > KWID
- > email_address
- > hashed_id
- > username

^ Attributes

- > address
- > last_purchase_date
- > status

> JourneySteps

> Interactions

Returning Profiles

82,184



New Profiles

234,839



Individual Profile

Profile ID: 5df1e7e421e18613de500504

Steps Completed

4

Active Journeys

0

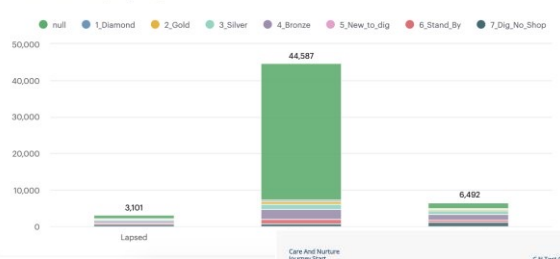
Tracked Since

June 14, 2020

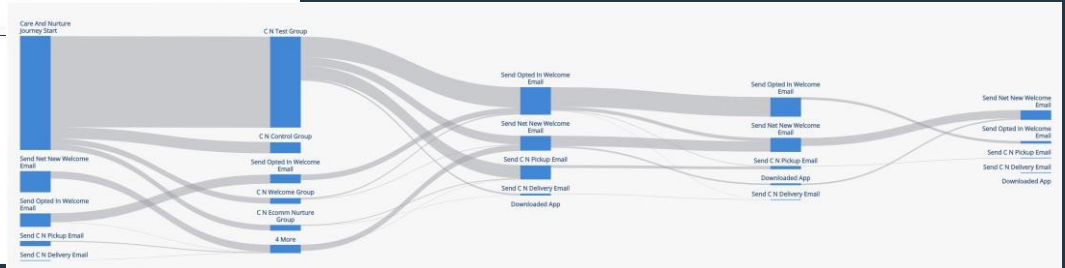
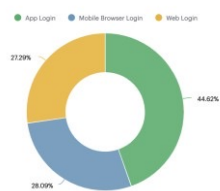
Engagement Score

32

Customer Groups by Segment



Digital Engagement on - web, mobile web browser & mobile app



Certification

Questions

- What is a journey step?
- How to create and use Journey Steps?
- How to add Interactions for a user?
- How to add Identifiers?
- What is a profile?
- What can be associated with a profile?
- How to create/update a profile?
- How to view a profile's information?



Thank You

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

