CSG Xponent

Xponent Identity Manager

Agenda

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
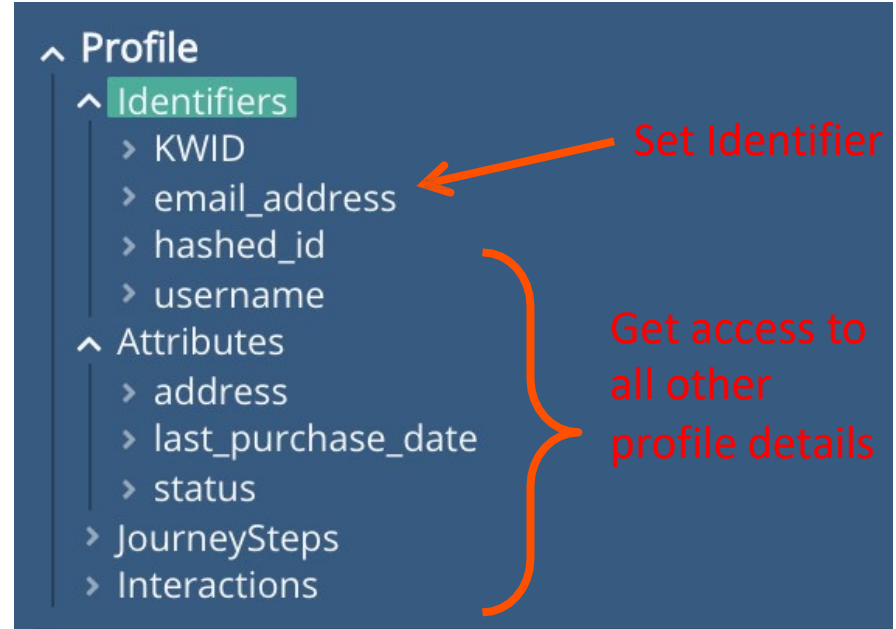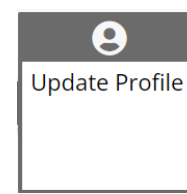
Identifiers

Sarah@gmail.com

	KWID	12bde46ae444f77f
	kwCookie	70bde46ae104f55f
Analytics visi...		70bde46ae104f55f
Country		
City		
Browser		Chrome 47.0
OS		Windows 8.1
Device		Desktop

DAILY ACTIVITIES

WORKS FROM 8-6 · PLAYS VIDEO GAMES · BOARD GAME NIGHT WITH FRIENDS

WEEKDAYS · WEEKENDS

USES SOCIAL MEDIA TO KEEP IN TOUCH WITH FRIENDS & FAMILY · WATCHES TV · READS BOOKS
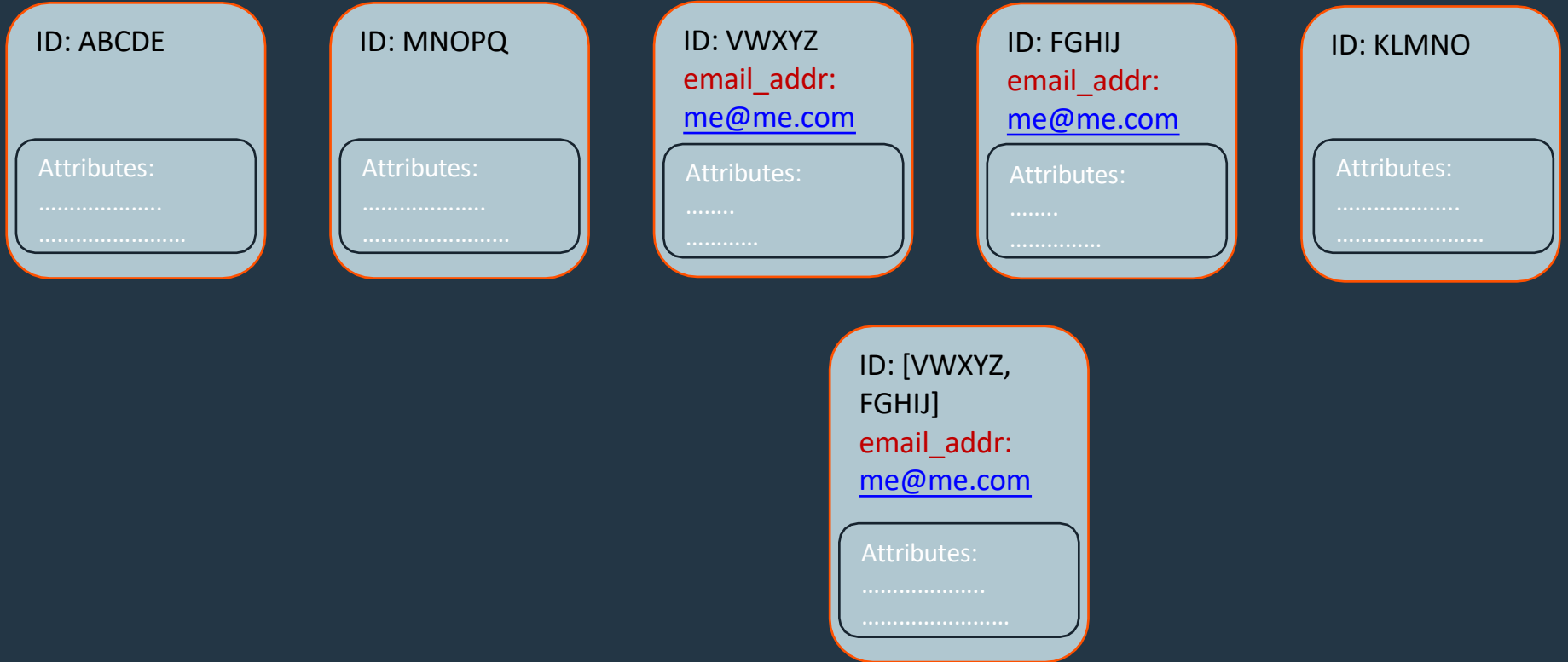
Journey Steps and Interactions

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

Update Profile

Set Identifier

Get access to all other profile details

Cross-channel Profile Identification and Merging

ID: ABCDE

Attributes:
....
....

ID: MNOPQ

Attributes:
....
....

ID: VWXYZ
email_addr:
me@me.com

Attributes:
....
....

ID: FGHIJ
email_addr:
me@me.com

Attributes:
....
....

ID: KLMNO

Attributes:
....
....

ID: [VWXYZ, FGHIJ]
email_addr:
me@me.com

Attributes:
....
....

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

Update Profile

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

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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

Interactions:
"channelTypeText": "web",
"timestamp": "2019-11-13T18:47:17.405Z",
"interactionTypeText": "view",
"engagementScore": 20,

"channelTypeText": "web",
"timestamp": "2019-11-13T18:47:29.206Z",
"interactionTypeText": "blur",
"engagementScore": 2,

"channelTypeText": "web",
"timestamp": "2019-11-18T14:07:55.984Z",
"interactionTypeText": "view",
"engagementScore": 20,

"channelTypeText": "web",
"timestamp": "2019-11-18T14:07:56.287Z",
"interactionTypeText": "formSubmit",
"engagementScore": 50,

Journey Steps:
"timestamp": "2019-11-13T18:44:54.215Z",
"journeyStepTypeText": "Visited Website"

"timestamp": "2019-11-13T18:45:24.085Z",
"journeyStepTypeText": "Submitted incomplete form"

"timestamp": "2019-11-13T18:47:17.420Z",
"journeyStepTypeText": "Visited Website"

"timestamp": "2019-11-18T14:06:40.052Z",
"journeyStepTypeText": "Visited Website"

"timestamp": "2019-11-18T14:07:56.022Z",
"journeyStepTypeText": "Visited Website"

"timestamp": "2019-11-18T14:07:56.262Z",
"journeyStepTypeText": "Submitted incomplete form"

Originally Profile A

Originally Profile B

Merged Profile Interactions

Merged Profile Journey Steps

Data Collection in Graphs
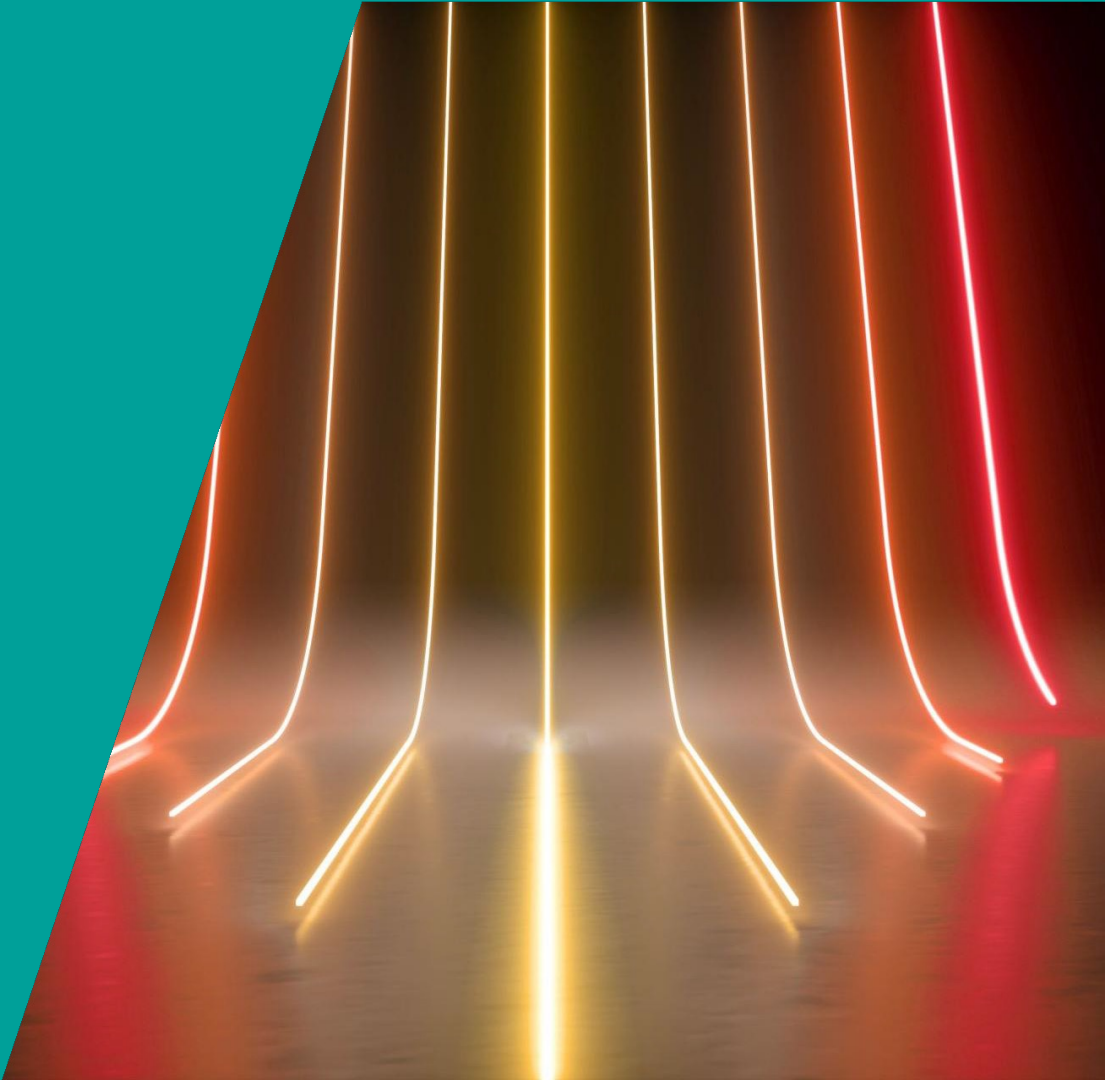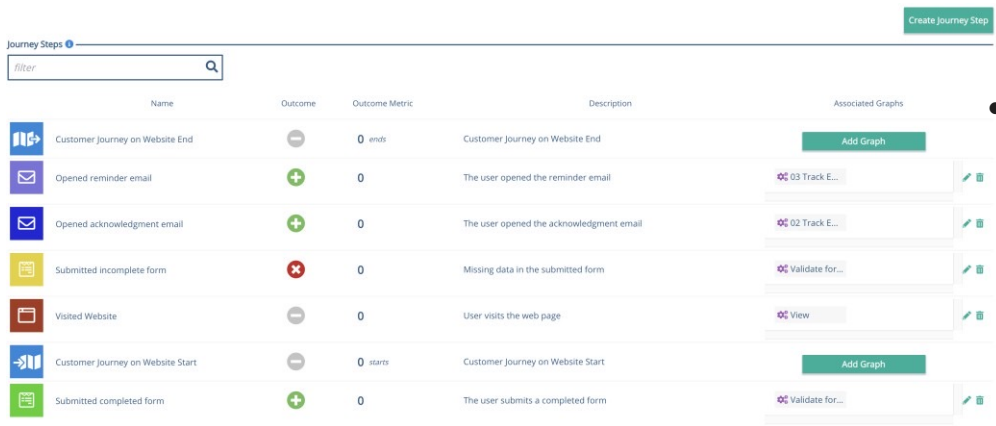
Profile Data Captured in a Graph

- 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
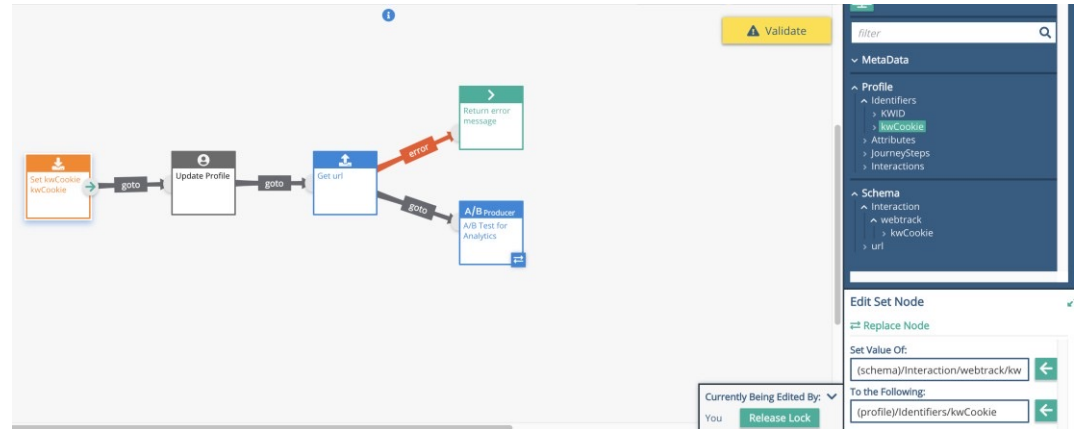
Creating a Journey Step

- In creating your journey steps, you can also define whether the journey step in question is a positive, neutral or negative result.

- 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
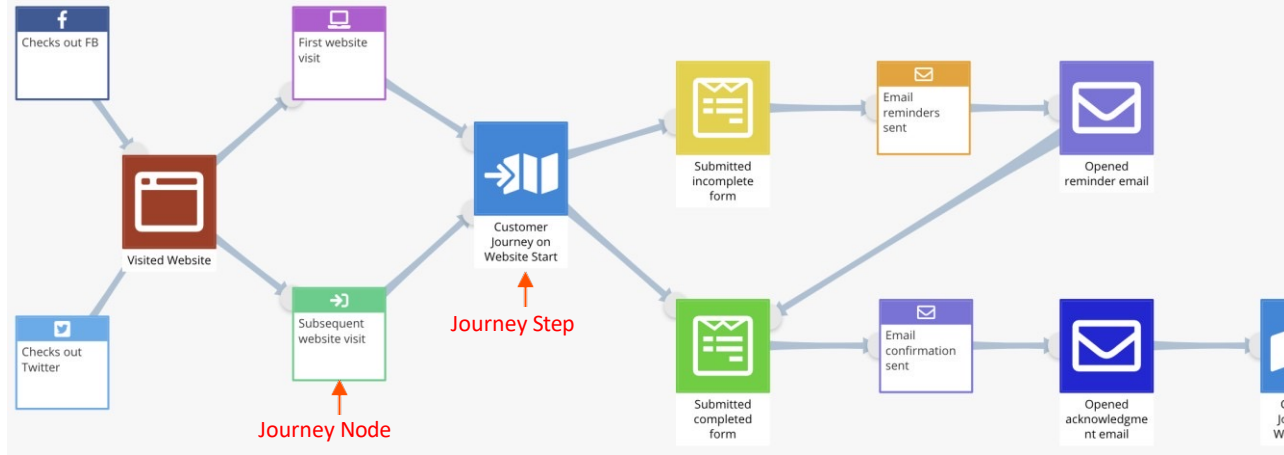
Journey Steps in a Graph

- 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
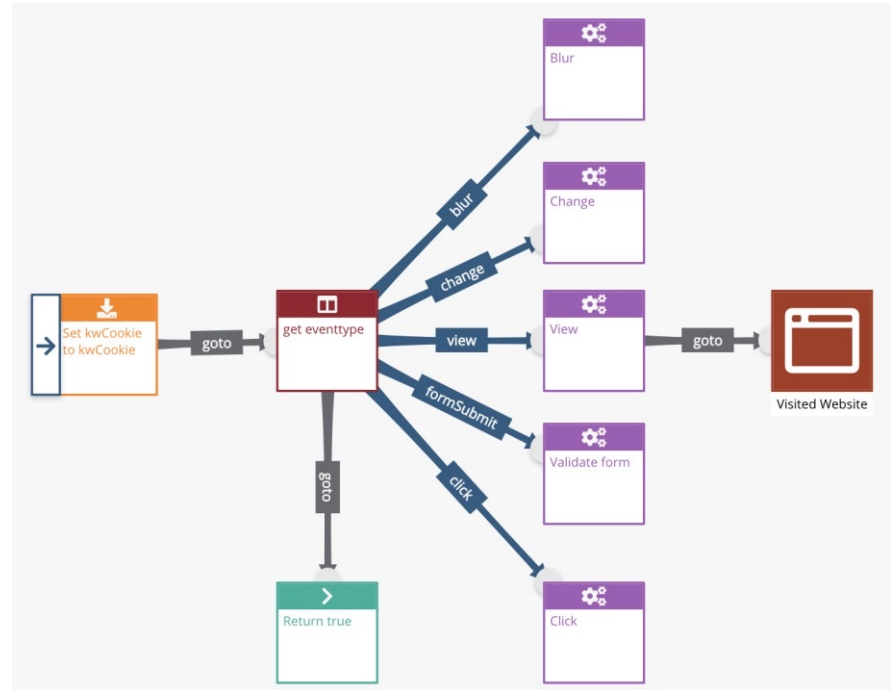
Interactions, Channels, Engagement Score & Identifiers

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

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

Identity Manager Feeding into Analytics
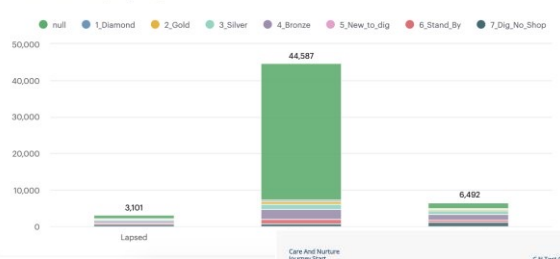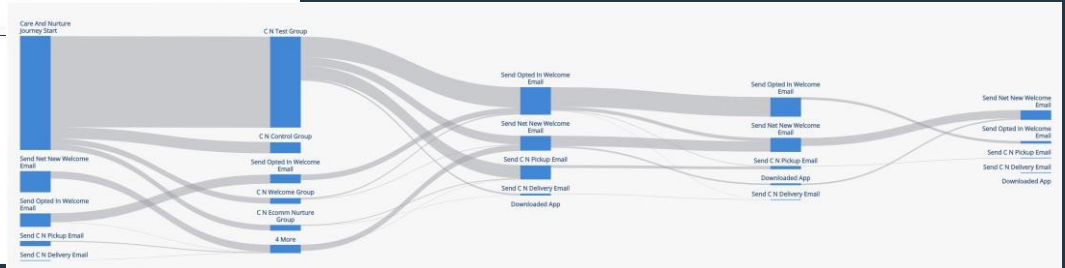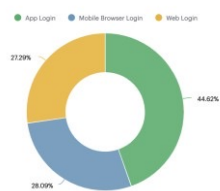
Certification

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