CSg Xponent

How to Build a Journey

Discover & Strategize

➢ Journey/Data Discovery
➢ KPI/Metrics Review
➢ Journey Map & Step Definition

Build, Test, & Deploy

➢ Graph Building/Testing
➢ Project Deployment

Analyze & Optimize

➢ Analytics/Dashboard Building
➢ Results Evaluation and Optimization

Journey Discovery Session

This session should outline the use case to understand the current state of the processes in place, and what the desired future state should look like. The output of this session should include a high-level journey of a customer or specific segments, initial journey steps, the business objective(s), and project overview document.

➢ **Primary responsibility: Journey Manager**
➢ **Consult: Configurer, Data Resource, & Analyst**

Data Discovery Session

This session is intended to understand what data is needed to get to the desired future state, where the data lives, how accessible is the data, and how the Journey Orchestration hub can consume the data (database connections, APIs, or batch files). When assessing what data is needed, include data that is critical to measuring KPIs (see "KPIs, Metrics, and Analytics Session" below). Without the right data, measuring the success of a project can be difficult or even impossible.

➢ **Primary responsibility: Data Resource, Configurer**
➢ **Consult: Analyst, Journey Manager**

KPIs, Metrics, and Analytics Session

This session should list out all the KPIs and metrics needed to measure the effectiveness of the Journey. The KPIs and metrics should help assess if the Journey's business objectives have been achieved. After deploying a Journey, the KPIs will help benchmark the current state versus the desired future state. The metrics will help illustrate the status of certain parts of the Journey.

This session should also define how the analytical dashboards should be built, specifically dashboard objectives, filters, and ownership. An external KPI definitions document should be created to clearly outline the technical calculations of all the needed KPIs. This document will help other users understand the dashboard and allow for future dashboard editors to make changes when necessary.

➢ **Primary responsibility: Journey Manager & Analyst**

Data Processing Discussion

This session is for communications between the data specialist and the configurer on what data will be present in the input to the Journey Orchestration hub and how to discern different categories of customers from those data points. The team members should have a clear and mutual understanding of when a user should be entered back into the Journey Orchestration hub for processing; whether this knowledge is used to capture user activity from the data feeds, to trigger entry into the journey, or to prevent them from stalling in the journey.

➢ **Primary responsibility: Data Resource & Configurer**

Define Journey Steps, Rules, and Logic

In order to build a project, the rules and logic determining when a profile enters a Journey Step needs to be defined. This session should get into the technical details around the Journey Steps defined in previous sessions. Journey Steps, by definition, can occur in any channel. If that is not the case for a Journey Step, document which channels the Journey Step can occur in and any additional rules. Projects usually have other decisions that need to be made outside of Journey Steps. Define these decisions and the rules around how to make the decision.

➢ **Primary responsibility: Journey Manager & Analyst**
➢ **Consult: Configurer**

Define Interactions

An interaction defines an action taken by a profile in a channel. Interactions have an engagement score assigned to them which are typically arbitrary, and a channel indicating where the profile conducted the interaction. When processed, the interactions populate the "Segmentation" section of the Journey Discovery Analytics (JDA) Dashboard.

➢ **Primary responsibility: Journey Manager & Analyst**
➢ **Consult: Configurer**

Build the Project

Using knowledge from training sessions and/or consulting with the CSG/Xponent Services team, build out the needed graphs in the project, create the Journey Steps and Interactions defined in previous sessions, and update the project settings accordingly. Once an initial build has been created, publish a new version to take a snapshot of the project. If anything goes wrong in the future, the published versions allow users to revert the project to a previous (stable) state.

➢ **Primary responsibility: Configurer**
➢ **Consult: Journey Manager**

Testing

After building or modifying anything in the Journey Orchestration hub, the changes need to be tested to ensure the project works as intended based on defined acceptance criteria. Test cases should be recorded in an external document and include, but not limited to, test case name, description, input data, expected results, actual results, pass/fail indicator, date tested, the Journey Orchestration hub graph version that will be deployed (if applicable), and the name of the tester.

> **Primary responsibility: Configurer**

Deploying

After the project has been built and tested, create a "production ready" version. This version will be used to deploy the project. Only graphs with listeners can be deployed. If deploying multiple graphs, then all graphs need to be deployed on the same version.

> **Primary responsibility: Configurer & Xponent**

Post-deployment and Project Monitoring

After deploying a project, ensure the project is running as expected. This can be done by running tests checking any real-time metrics, reviewing error log tables in a database, and/or checking the response from the Journey Orchestration hub monitoring graph. If there are any issues, then revert the project back to a previously published stable version.

> **Primary responsibility: Configurer**

Evaluating Results, Optimizing and Next Steps

Based on KPIs and metrics defined in previous sessions, evaluate how the project is doing and iterate over the project if needed. A project can be evaluated by reviewing the JDA Dashboard and creating a Self-Service Analytics Dashboard with custom KPIs.

> **Primary responsibility: Analyst & Journey Manager**
> **Consult: Configurer**