

Project Portfolio (Use Cases)

Business Pillar:

CX Digital Transformation

Goal:

Develop a CX Digital Transformation program for a \$2B Enterprise after acquiring a series of global teams.



Contextual Overview

Why?

Value creation for the business goes beyond increased revenue alone. Business value is also created through **automation tools** (allowing scale and decreased overhead), **increased customer data and insights**, and measurably **improved customer experiences**.

How do you deliver a CX Systems Model for Business Enablement?

Through the evolution and development of a robust, extensible, connected **CX platform ecosystem**—one designed to **enable** [Client]’s business teams to deliver scalable, personalized, and value-driven programs.

What is the outcome?

A holistic systems environment where **both** the line-of-business teams and the implementation teams have accountability in the success of the programs, **and** the growth/maturity of [Client]’s CX technology.

What is the future-state goal?

To position [Client] as a global leader in CX, through innovative and cutting-edge digital programs and seamless customer interactions.

Guiding Principles

Platform Agnostic

Democratizes Data:
Serves Everyone (BU-
Agnostic & is for All
[Client])

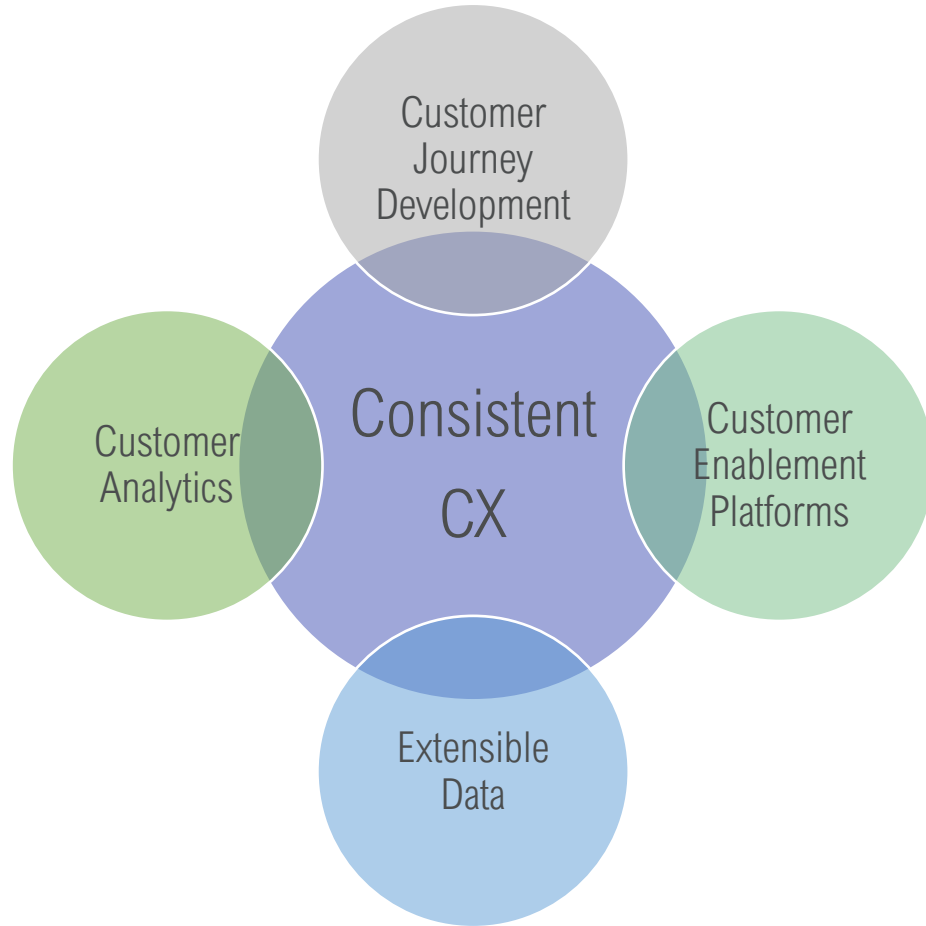
Positions CX as Central

Captures Extensible/
Global/Scaling Readiness

Establishes Foundational
Systems for Business
Intelligence Initiatives
(AI, ML, DS)

Serves C360/
"1 View"

[Client]'s Focus Areas for Delivering Consistent CX



	Main Themes	Outcomes
Customer Journey Development	<ul style="list-style-type: none"> Data driven CX campaigns (leveraging existing and desired data) Cross-functional data capture initiatives 	Data-driven customer journeys, rooted on business outcomes , mapped to automation and measurable success indicators
Customer Analytics	<ul style="list-style-type: none"> Captured in a consumable format that can be aggregated with the 360 view of the customer. Tied to key business drivers and measurable decision-making. 	Clear and Actionable program insights (reports, dashboards, and business intelligence models), tied to tangible business metrics.
Customer Enablement Platforms	<ul style="list-style-type: none"> Mapping automation tools to business processes Connected systems of record Audited view of customer touchpoints 	A connected and holistic platform ecosystem, designed modularly (to enable extensible business solutions, not individual requirements)
Extensible Data	<ul style="list-style-type: none"> A complete customer profile Consolidation & Centralization "Extensible/Global Ready" - Sharing Rules (by BU/region) Data Hygiene and Common Definitions 	<p>A simplified central data repository, built as a hybrid between Extensible/Global governance and local (or BU-specific) requirements</p> <p>Designed to incorporate future business initiatives in data (AI/ML)</p>

CX Digital Strategy (Short-Term Goal)

Question: How does the **Data Environment** interact with the **Execution Environment**?

Answer: they are dependent on each other & work in tandem to deliver a holistic, consistent CX.

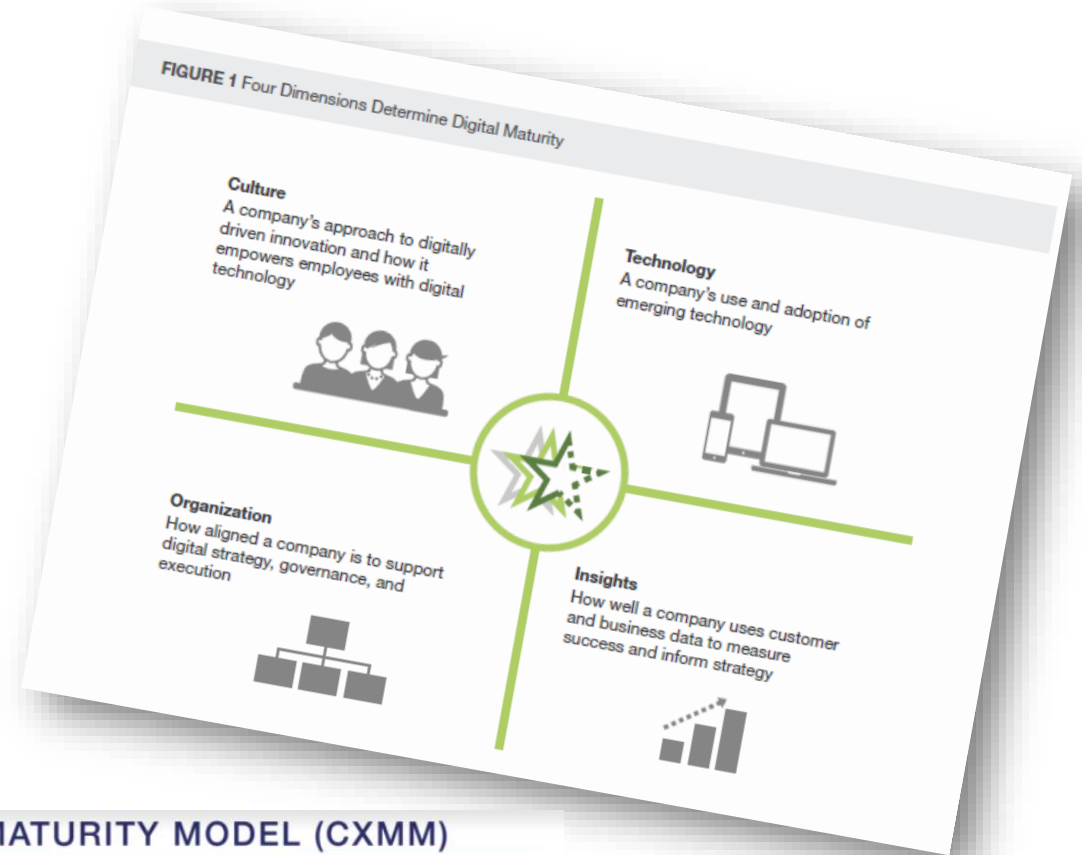
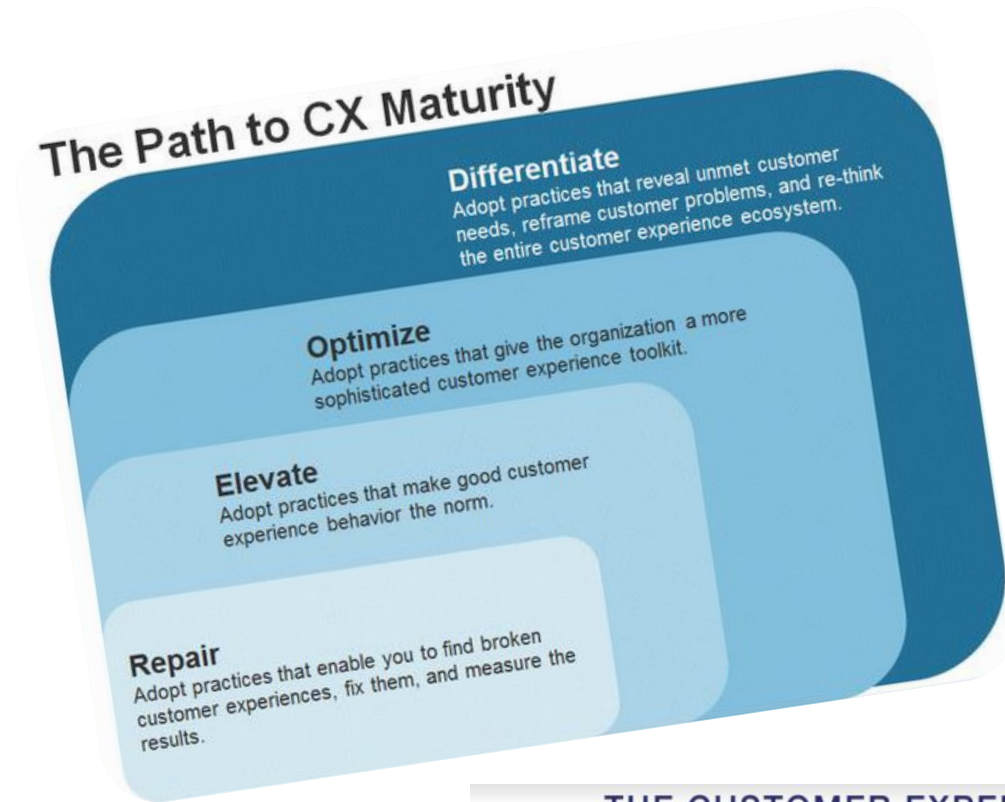
DATA ENVIRONMENT:
Data systems should store & deliver data points required for an optimal and connected experience.



EXECUTION ENVIRONMENT:
Action/execution tools should be built to orchestrate a connected and personalized customer experience, and channel-specific performance insights.

CX Maturity Levels

What are the methods & dimensions does the CX industry use to measure maturity level?



THE CUSTOMER EXPERIENCE MATURITY MODEL (CXMM)





CX SYSTEMS - STRATEGY FRAMEWORK

CX Systems Strategy Framework

What is the CX Systems Strategy Framework?

A series of guided questions, developed to capture the required details to design and develop a CX program from ideation to implementation.

Most importantly, a CX Systems Strategy Framework establishes touchpoints (and alignment) across the critical teams: the **lines-of-business** (business units), the **technical implementation teams** (IT/Data Engineering), and the **strategic insight resources** (reporting analysts).

CX Systems Strategy Framework

(Business Point of View)

Apply the CX Systems Strategy Framework Questions to all CX Initiatives:

OUTCOMES:

- What are the **business outcomes** the customer wants at each touchpoint of their journey?

MEASURE:

- What are my **metrics** that matter?
- What are my specific measurements of success, or indicators for early success (or failure)?
- What can be measured, and what can't be measured?

ASSUMPTIONS:

- What are my **assumptions** before initiating this program/campaign, and my hypothesis?
- How do I continuously validate that my assumptions are still valid?

INNOVATION:

- What ways can [Client] still empower various lines-of-business (R&D) without limiting **speed**?

CX Systems Strategy Framework

(Technical / Analyst Point of View)

Apply the CX Systems Strategy Framework Questions to all CX Initiatives:

RISKS:

- What are the **technical risk factors** to executing this program
- What are the **impacts** if those risks occur?

TECHNICAL FEASIBILITY:

- What **platforms** do I need in place for each of those touchpoints to deliver that ideal, seamless, and consistent CX?
- What are the **current gaps** that need to get addressed prior to go-live?
- What is the **onboarding plan** for integrating tools to existing [Client] governance?

ANALYTICS:

- What is the level of effort to make this data available? (**data readiness**)
- What **data and insights** will get created at each of those customer touchpoints?
- Does that match the data I want?
- Does the data/insights map back to the 360 view of the customer?
- What is the **onboarding plan** for integrating the data to existing [Client] governance?

CX Systems Strategy Framework

What could if [Client] does NOT implement a CX Strategy Framework?

- **Opportunity Cost:** As other competitors begin to ramp up their own CX systems and strategies, [Client] may be missing out on their key opportunity to establish software/data intelligence/CX as a core competency and leveraging its own commodifiable product (customer data and insights).
- Missed goals/deadlines:
- Stakeholder expectations:
- Revenue
- Customer attrition
- Decreased customer satisfaction
- Increased technical debt
- Increased overhead & duplicative workstreams
- Misaligned roadmaps and business unit goals
- Increased sunk cost (in failing platforms/initiatives) – BUILD VS. BUY



CX OPERATING MODEL

CX Digital Operating Model (Conceptual)

What are the critical roles for developing a CX program?



Line of Business

- Share innovation concepts to drive business initiatives forward, and work with technical SMEs (below) to ensure system/data feasibility and integrity.
- Work closely with internal and external stakeholders (sales & practice partners/customers) to understand customer needs.
- Build personalized customer journeys and personas & tailor based off analytics.



Reporting &
Data Analysts

- Sits between the line-of-business and IT/Engineering
- Design and build strategic dashboards and reports, and work with business and systems SMEs (above) to ensure insights are linked to business outcomes and systems/data feasibility.
- Build and share innovation concepts around new key analytics initiatives (data science, ML, AI) to drive business initiatives forward.

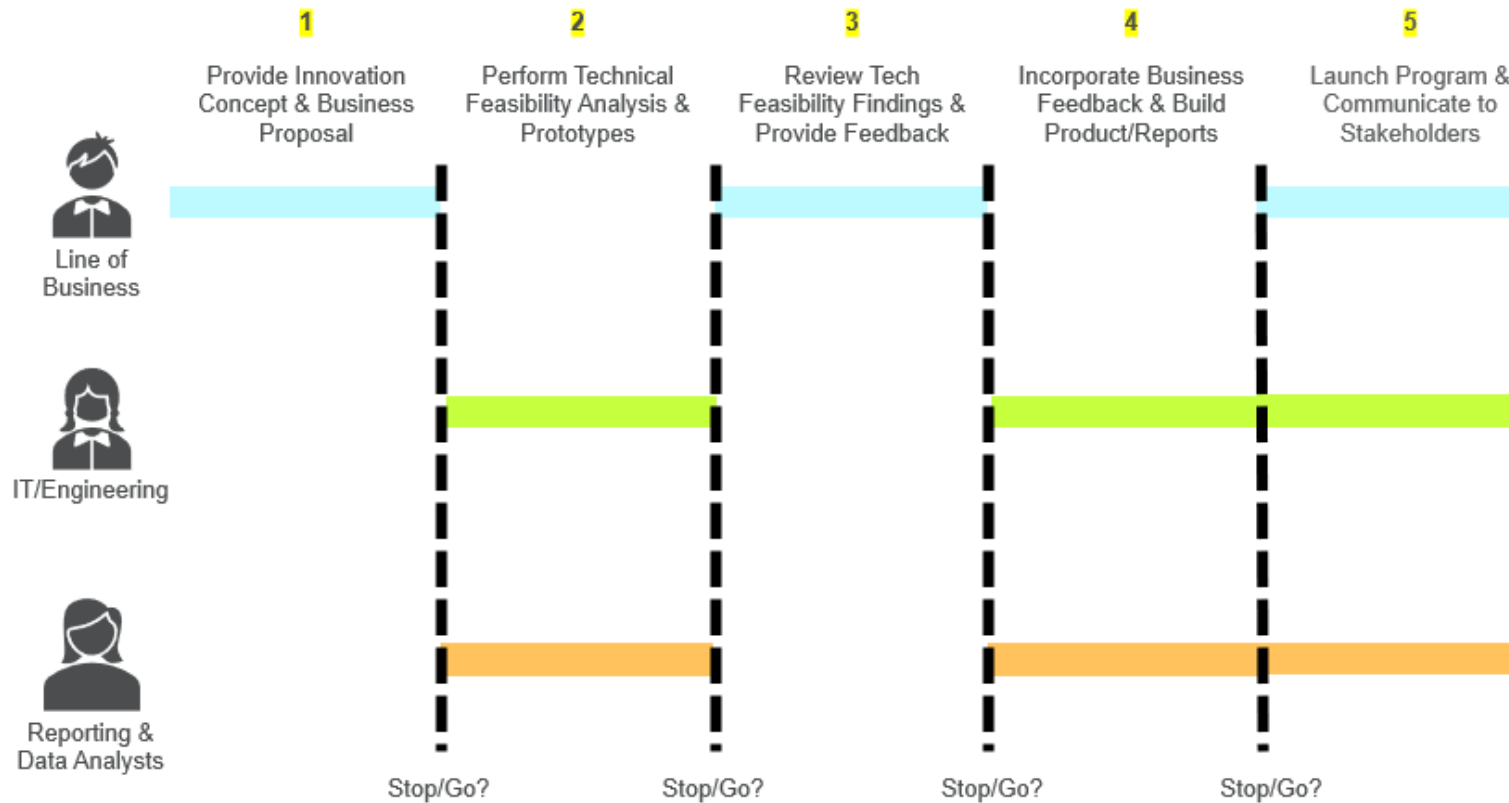


IT/Engineering

- Establish (and enforce) systems governance and data integrity
- Map customer journeys to current platform technologies, incorporating automation where possible; identify technology gaps and provide recommendations for improved CX.
- Develop innovation concepts to drive business initiatives forward and collaborate with the line of business to grow their concepts & to map to feasible technology.

CX Digital Operating Model (Conceptual)

What are the phases of developing a CX program, and the key deliverable for **each role**?

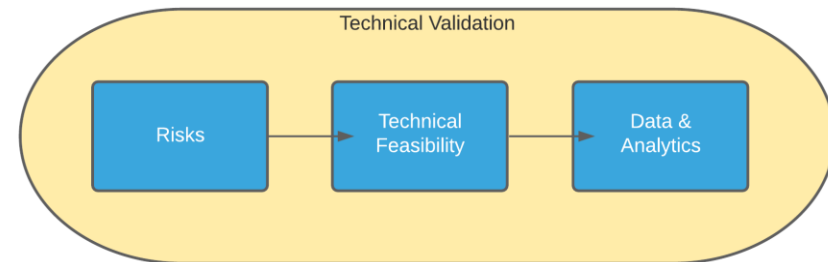
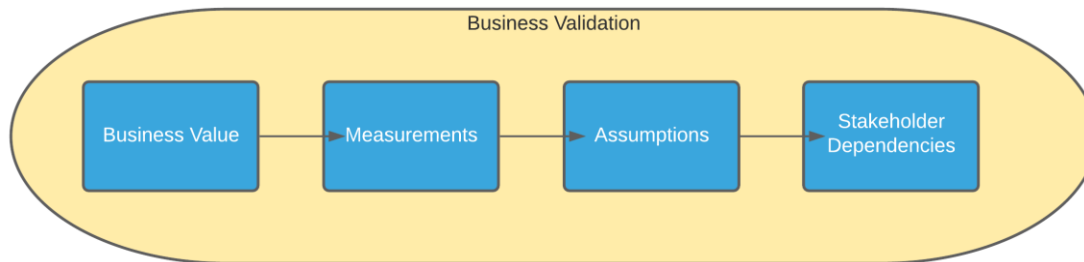


CXDI Systems Architecture Process

What is the CXDI Systems Architecture Process?

Best practice guidelines developed to capture the required details to design and develop a CX system/platform from ideation to implementation.

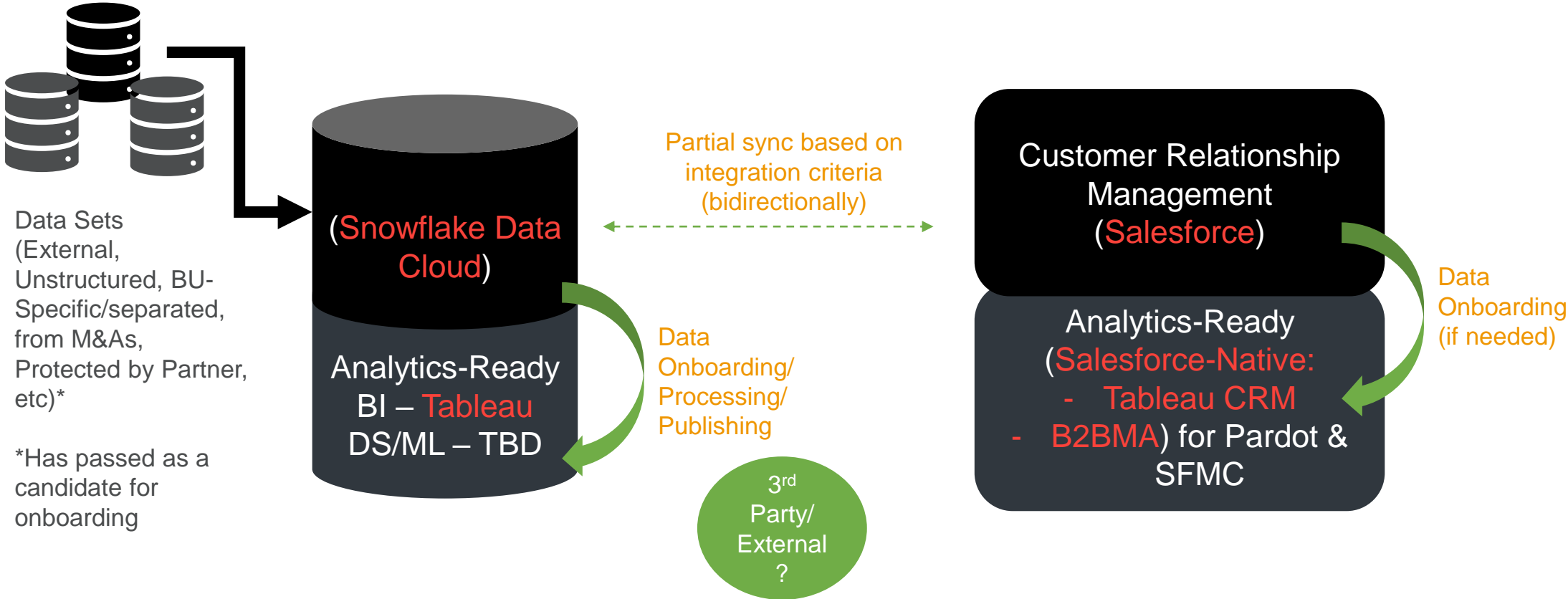
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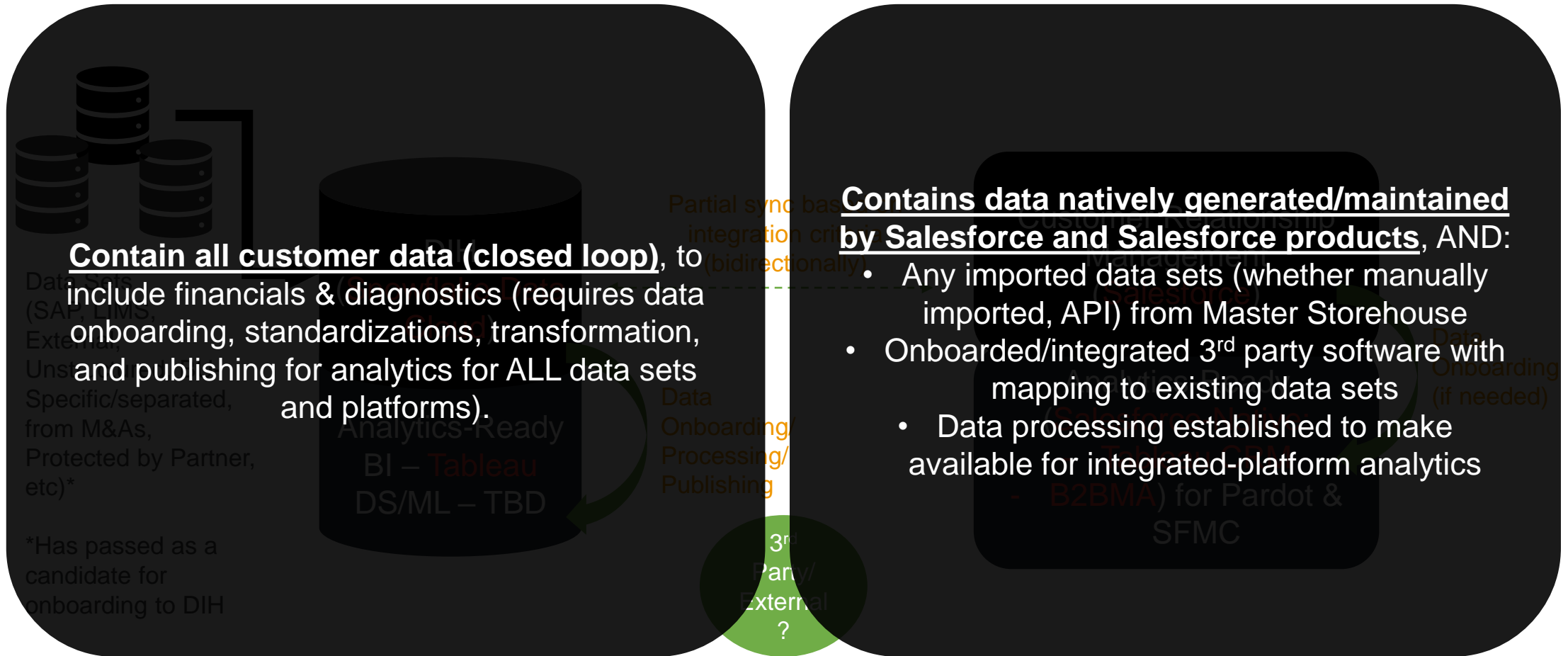


CX SYSTEMS - LOGICAL LANDSCAPE

High-Level Platforms Data Architecture – Extensible/Global & for Scale (Discussion)



High-Level Platforms Data Architecture – Extensible/Global & for Scale (Discussion)



High-Level Platforms Data Architecture – Extensible/Global & for Scale (Discussion)

Candidate for Reporting?

- ✓ What metrics do you need to see in your final report? (data engineering research req'd?)
- ✓ Does this data need to be Extensible/Globally available (bringing in BU-specific data-sets to share)?
- ✓ Are your primary data sets already in DIH (Snowflake), or on the roadmap to be? (**LOE – Level of Effort**)
- ✓ What level of data onboarding and transformation needs to occur?
- ✓ Is the data import one-time (batch), or does it need to be automated (API)?
- ✓ What level of processing needs to occur before the data can be exposed for reporting?

Candidate for SFDC Reporting?

- ✓ Are your primary data sets already in Salesforce as a native data set? (Salesforce product, or minimal integration needed)
- ✓ What metrics do you need to see in your final report? (i.e. is it confined to SFDC-Cloud products?)
- ✓ Do you need to join additional data sets (incl. from external platforms outside the existing ecosystem)? **LOE – Level of Effort**
- ✓ Is the data import one-time (batch), or does it need to be automated (API)?
- ✓ Is there any kind of data processing needs to occur before the data can be exposed for reporting?