



liquidhub  
Engagement Blueprinting

Prepared for the IIBA | May 2017

# Agenda

- I. Introduction
- II. Brief LiquidHub Overview
- III. Engagement Blueprinting
  
- IV. Joint Exercise
  
- V. Wrap-Up & Conclusion

STRATEGIC ADVISORY

# Peter Classon



**Peter Classon**

Partner

Solutions, Sales Solutions

+1 484 678 7310

pclasson@liquidhub.com

Peter is a partner in LiquidHub's Strategy Studio where he focuses on delivering digital strategies and Enterprise Architecture guided solutions for insurance, banking, and asset/wealth management clients.

Peter has over 20 years of experience in information technology and has worked as a consultant, start-up entrepreneur, and CIO. Peter has a strong background in IT strategy, systems integration, technical operations, and business process reengineering. He has vast industry experience with knowledge in financial services, insurance, wholesale distribution, B2B, and buying cooperatives. He is passionate about enabling business transformation through creative and strategic use of information technology. He is instrumental in LiquidHub's continuous development and innovation of frameworks such as Business Oriented Architecture (BOA), Portfolio Optimization Rationalization & Transformation (PORT), Architecture Maturity & Mobilization Framework, and Engagement Blueprinting.

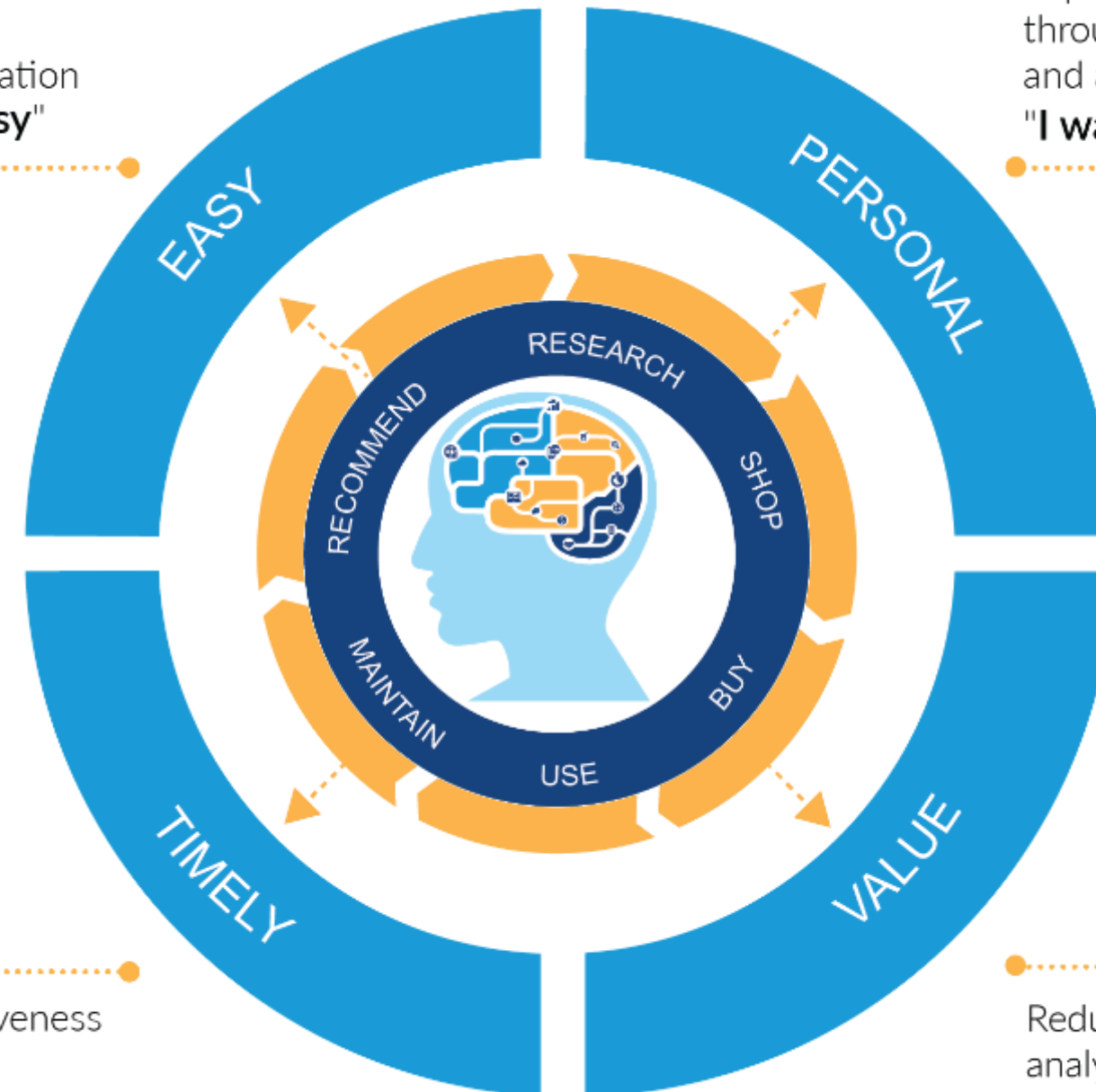
Prior to LiquidHub, Peter worked at Affiliated Distributors as the CIO. While there he was responsible for the overall definition, implementation, and maintenance of A-D's information technology. Before A-D, Peter was part of Procurian, a tech startup that created a horizontal B2B procurement exchange. Earlier in his career, Peter implemented large-scale ERP solutions both with KPMG and Accenture.

ACROSS THE ENTIRE JOURNEY

# We Understand Peoples' Expectations

Create a smooth experience through multi-channel integration  
**"I want it to be easy"**

Improve intimacy through intelligence and analytics  
**"I want you to know me"**

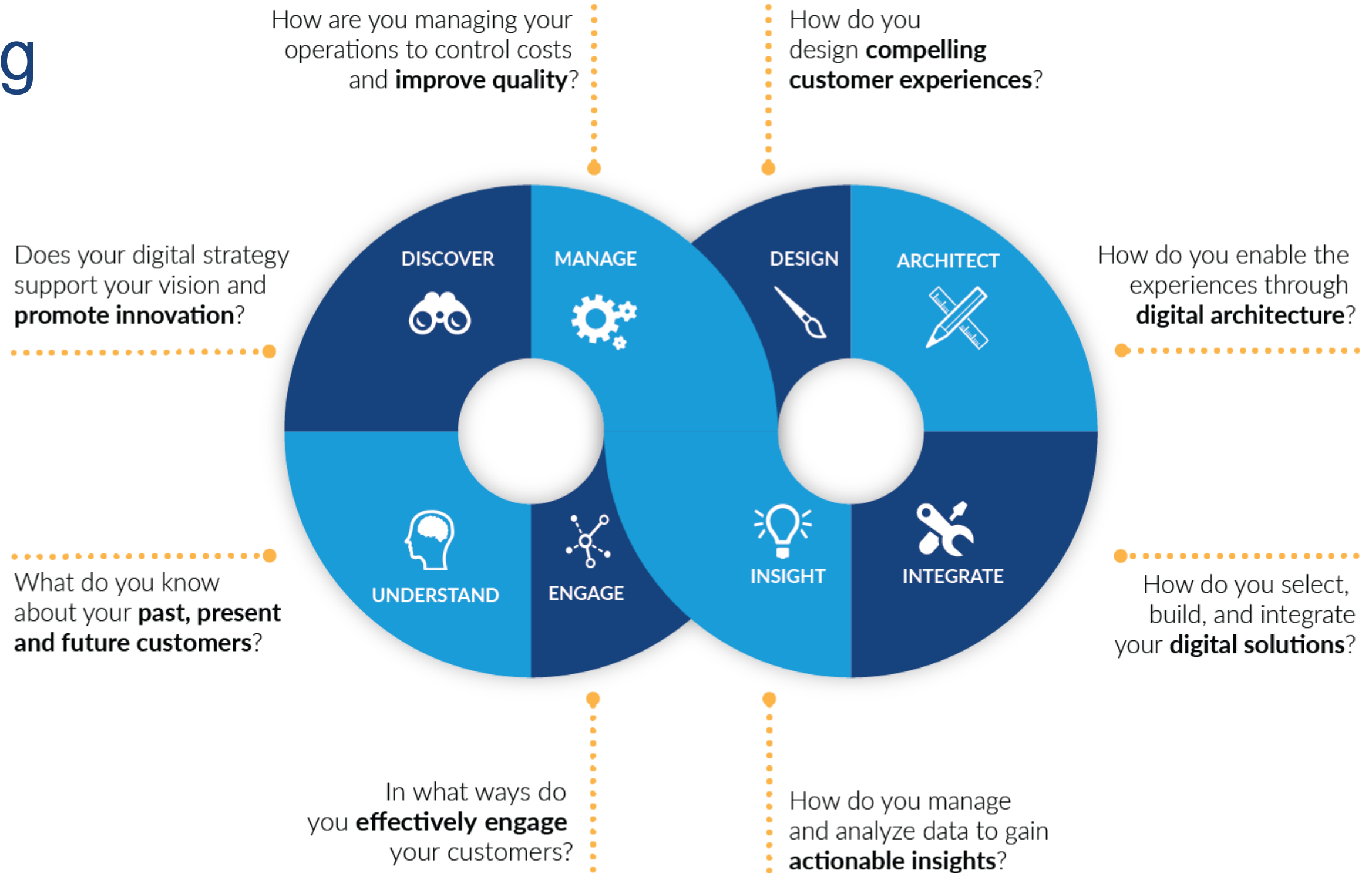


Accelerate responsiveness through operational improvements  
**"I want it now"**

Reduce cost by enabling analytics-driven decisions  
**"I want value"**

WE UNLOCK THE VALUE

# By Transforming Engagement





# Designing, building & operating solutions for the complete lifecycle

## THINK

- Discovery
- Strategy
- Data & Analytics
- Experience Design
- Digital Architecture

## BUILD

- Engagement Platforms
- Data Management
- Experiences
- Digital Marketing
- Engineering & Integration

## OPERATE

- Platform Management
- Business Solutions Management
- Customer Insights

### LiquidMarketing

- Demand generation
- Brand development
- Campaign design
- Advertising
- Conversion optimization
- Marketing measurement
- Loyalty management
- Product/brand launches

### LiquidSales

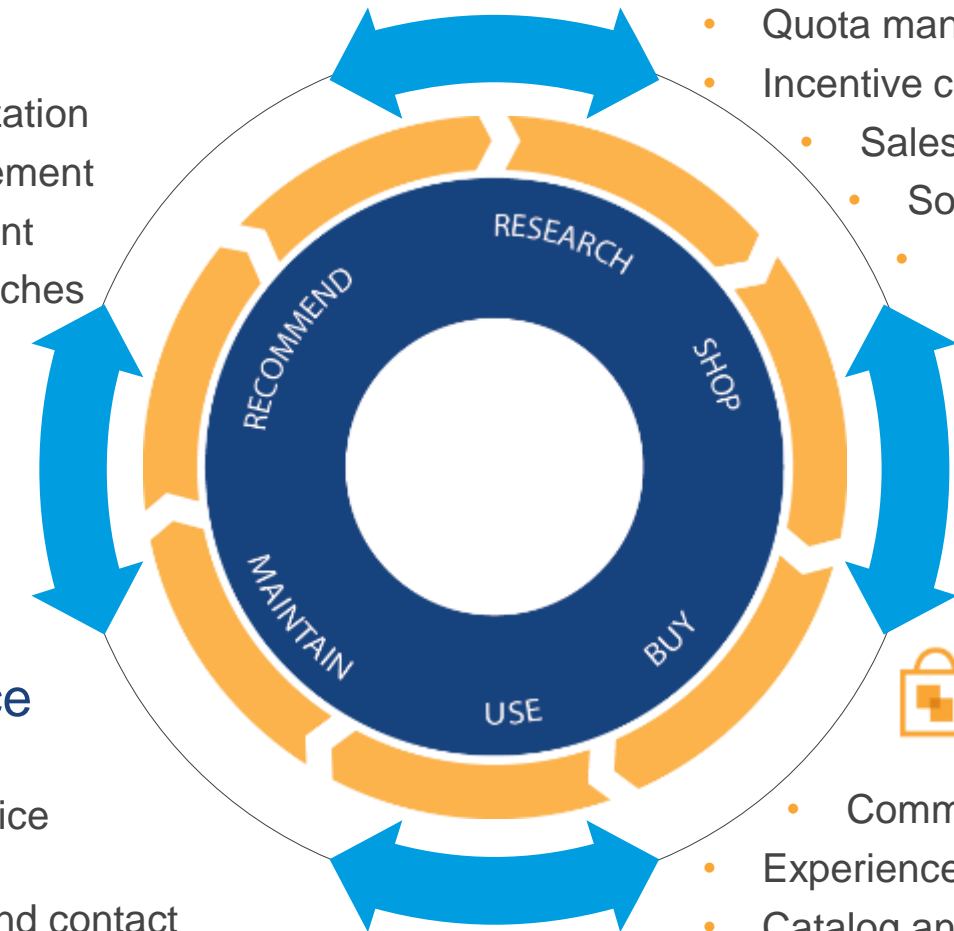
- Salesforce automation
- Contact management
- Quota management
- Incentive compensation
- Sales forecasting
- Social selling
- Content development

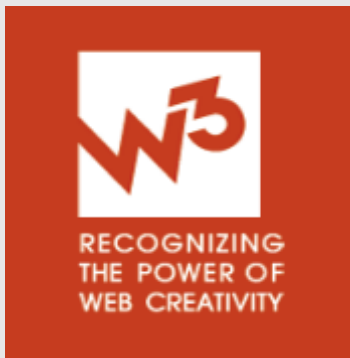
### LiquidService

- Customer self-service enablement
- Communications and contact strategy
- Cross-channel contact center
- Cross-sell
- Knowledge management & FAQ
- Social listening

### LiquidCommerce

- Commerce platforms
- Experience management
- Catalog and content management
- Recommendation engines
- Pricing, promotion & product dev.
- Order management & payment processing
- Checkout optimization





## W3 AWARDS GOLD WINNER:

Edward Andrews – General Website  
Orkin – General Website, Microsite,  
Website Services, Website Features



ComputerWorld  
Data+ Editors' Choice Award



INC. 500:  
Fastest-Growing Privately Held Companies



FORBES:  
America's Most Promising Companies



DELOITTE:  
Technology Fast 50



FORTUNE:  
IAOP Leader's List



IMAs:  
Interactive Media Awards



Kaggle:  
Global analytics competition - Airbnb



DMIN:  
New innovations in analytics

# 3,000+ people worldwide supporting your success

Strategists | Researchers | Designers | Technologists |  
Architects | Data Scientists | Innovators

## NORTH AMERICA

- Atlanta
- Boston
- Los Angeles
- New York City
- Philadelphia
- San Francisco
- Seattle
- Wilmington

## EUROPE & ASIA

- Amsterdam
- Bangalore
- Gurgaon
- Hyderabad
- London
- Shanghai
- Warsaw

UNDERSTANDING ENGAGEMENT

# Customer Expectations are High



*“You’ve got to start with the customer experience and work back toward the technology — not the other way around.”*

— Steve Jobs

# Then and Now

**Before**, “consumer expectations were bounded.”



**Now**, consumers expect “incremental and iterative changes on an ongoing basis” via software and apps.



25 new iOS 9 features that are rocking our world  
Macworld Staff @macworld Sep 16, 2015 4:01 AM

What's new in iOS.

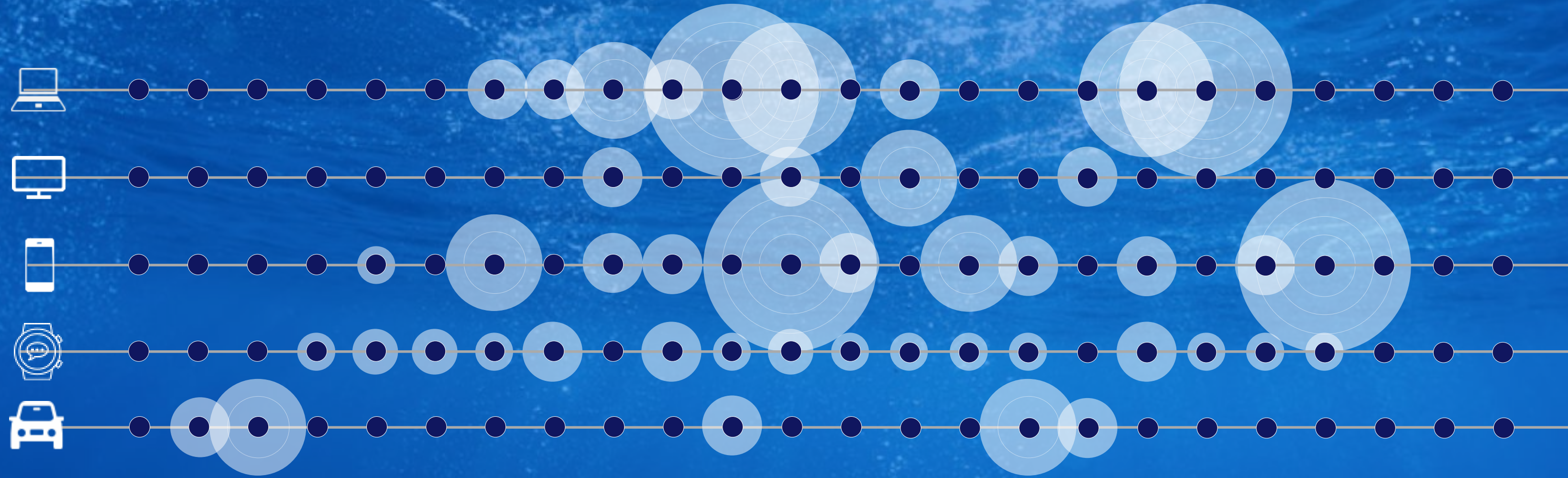


First, Tesla's Model S sedan downloads firmware updates on a regular basis. These software changes go much further than simply changing user interface elements on the dashboard. Instead, they may modify major elements of the car from its suspension to its acceleration and handling characteristics.





Experiences move across screens and vary in intensity, unfolding over, and changing with, time and context.



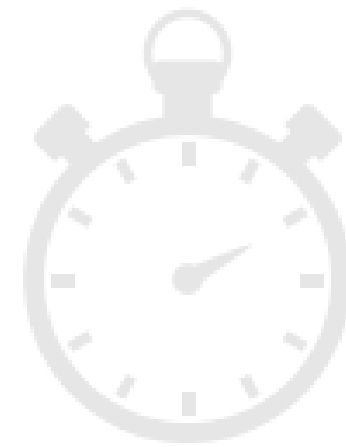


# Micro-Moments Matter

Micro-moments are those critical junctures when we turn to technology to help us take action and make informed decisions. These moments are loaded with intent, context, and immediacy.

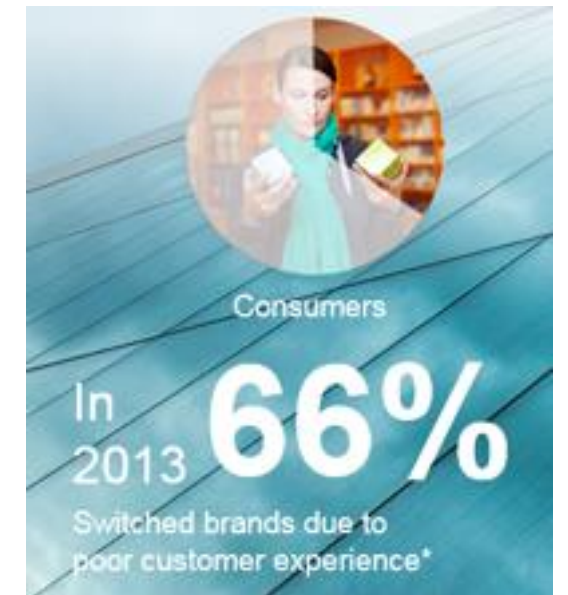
## Typical Micro-Moments:

- I want to know . . . .
- I want to go . . . .
- I want to do . . . .
- I want to schedule/book/buy . . . .
- I want to manage . . . .



29%

of smartphone users will immediately switch to another site or app if it doesn't satisfy their needs (for example, they can't find information or it's too slow).

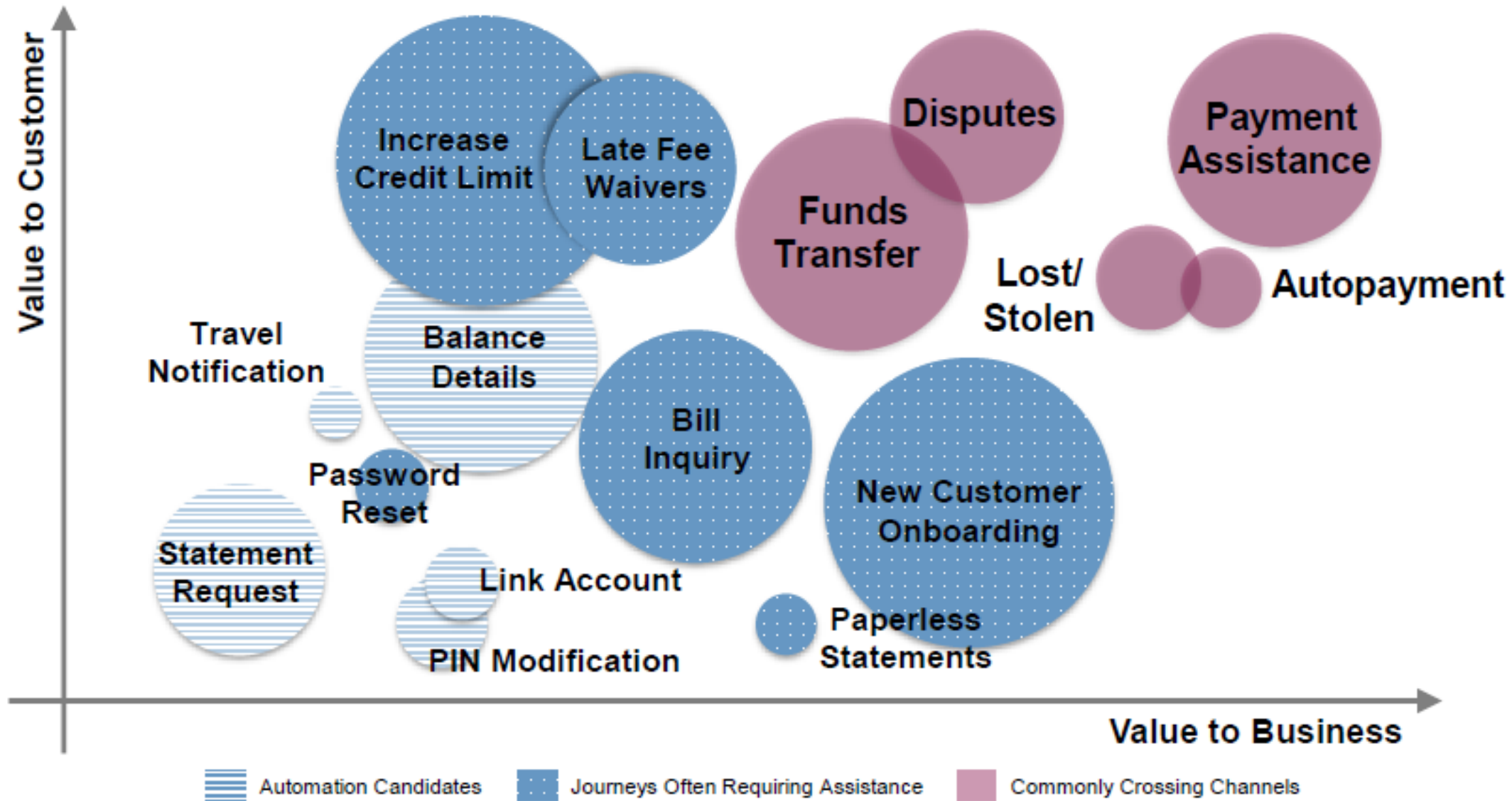


Only 9% of users will stay on a mobile site or app if it doesn't satisfy their needs (for example, to find information or navigate quickly).



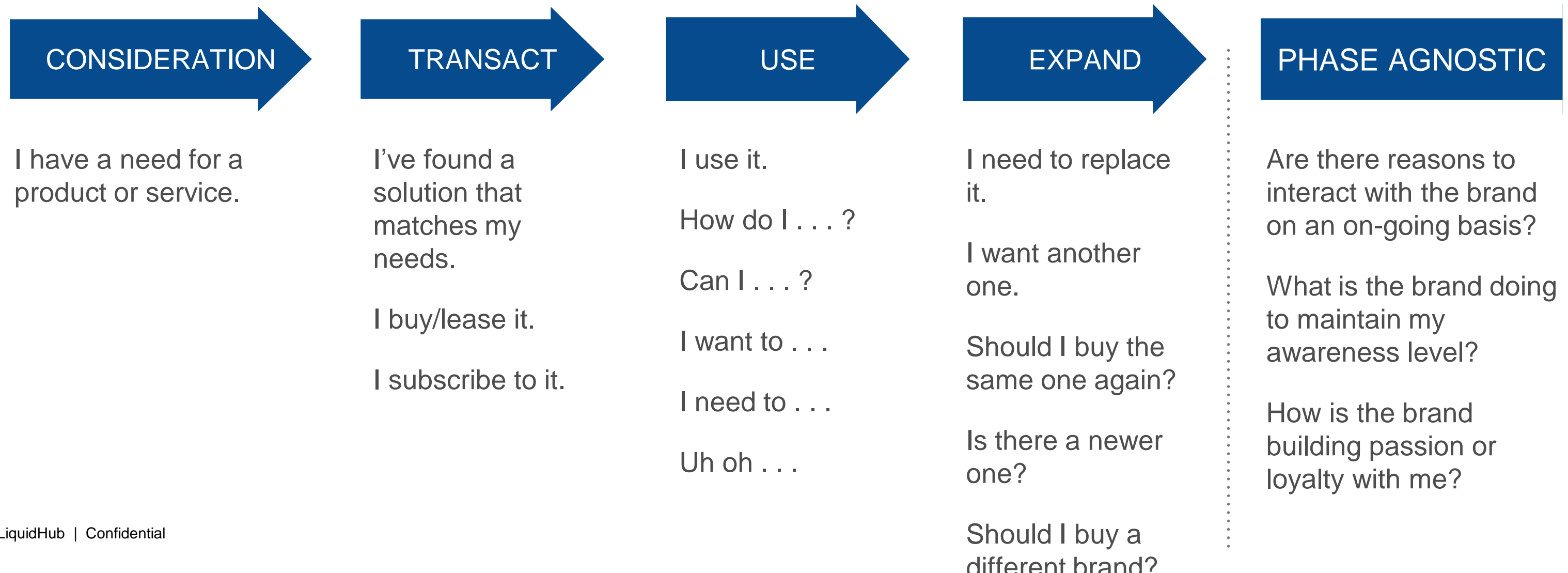
# Which Moments Drive Customer & Business Value?

FOCUS ON THE HIGH-VALUE MOMENTS PRIORITIZED BY BUSINESS VALUE



# Engagement Across the Journey

An engagement mapping initiative may look across a service delivery experience (or series of experiences) that happen in a finite period of time or across an entire customer/user journey from consideration through relationship expansion. In every instance, however, the engagement map will analyze and reflect on what the customer is doing as well as what the employees and tech stack are doing to support the engagement.



VISUALIZE THE OPPORTUNITIES

# Seeing, Truly is Understanding

By mapping the journeys, it's possible to understand the numerous brand touch points as well as the places along the journey where customers might be won or lost and where the brand experience can be improved.

Journeys don't happen in isolation, however. They are a composite of people, processes, business logic and technology enablement.



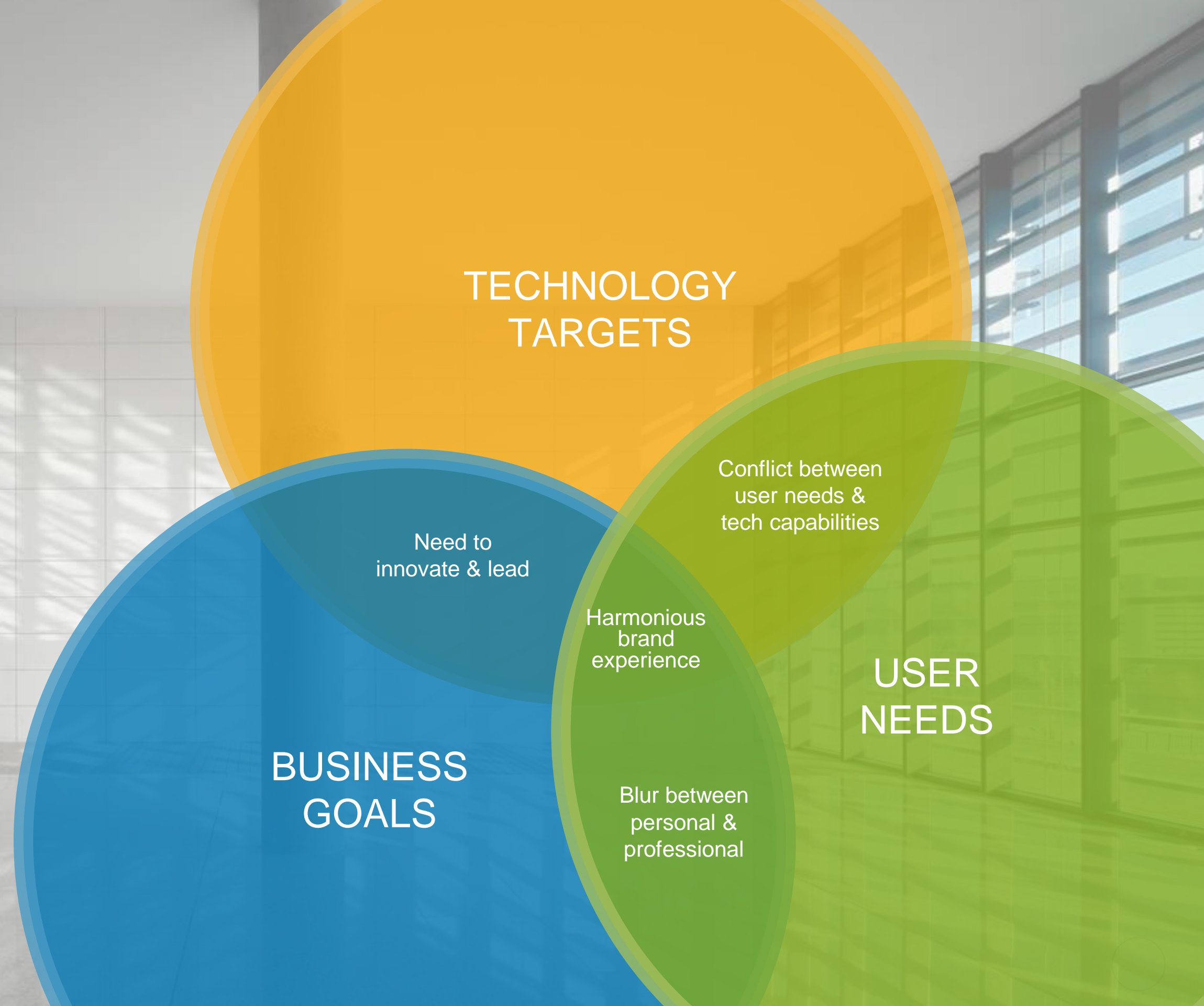


MANY INFLUENCING FACTORS

## We seek balance.

We approach engagement from a “people first” perspective, but we understand there is a delicate balance of business goals, technology targets and user needs behind every experience, every transaction, every brand moment.

We also understand we must deliver against all of these interests and their associated KPIs.

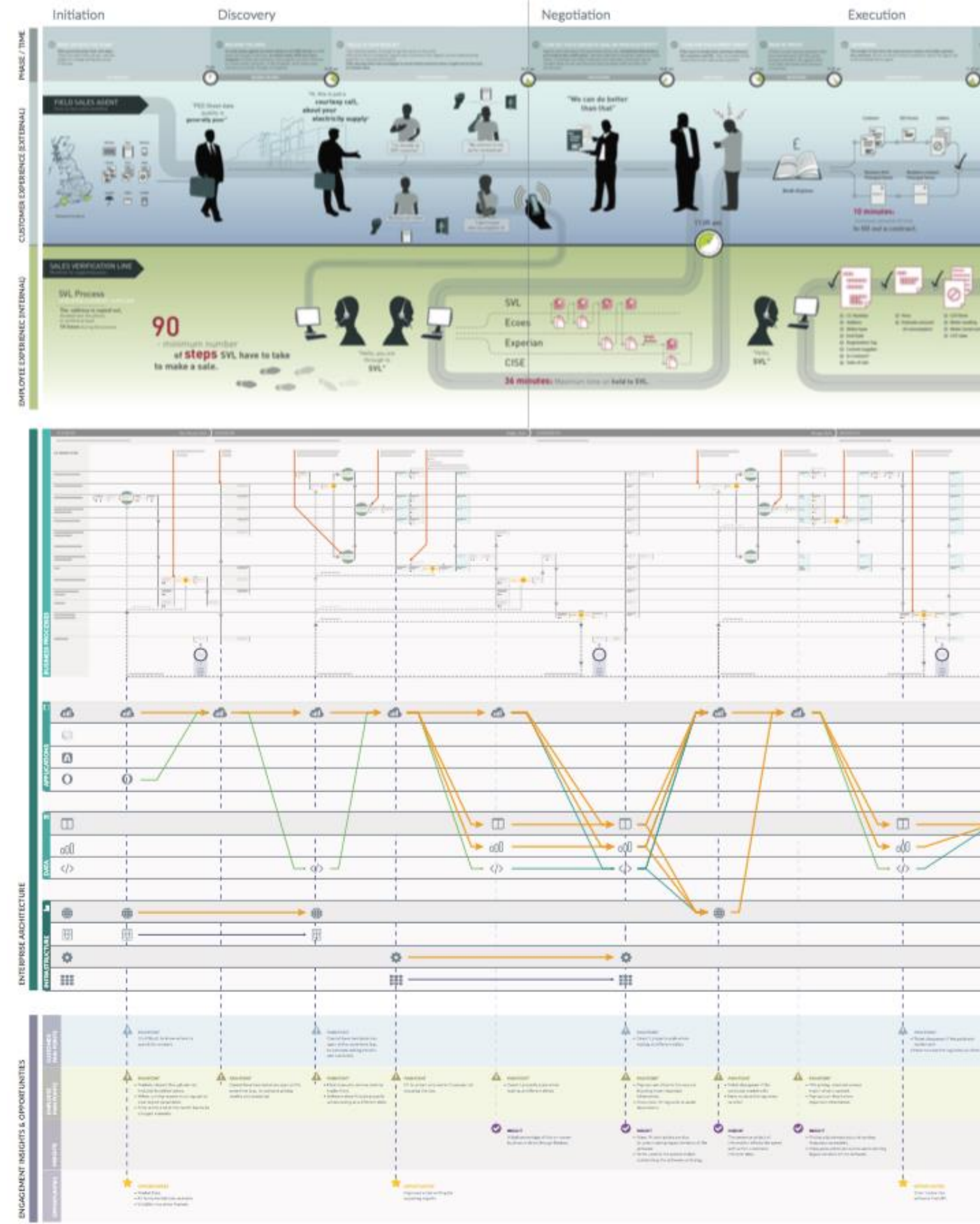




# What is Engagement Mapping?

An engagement map is a highly visual and informative way to look across a service delivery experience (or series of experiences) to understand the following:

- How customers/users engage with companies and brands across a portfolio of offerings (products, services, locations, employees, etc.)
- Identification of customer/user touch points across channels (digital and physical) and devices and when each is relevant
- How employees engage with customers to deliver great brand experiences in the moment and over time
- How employees engage with organizational structure, business processes and technology to deliver products and services for customers/users
- How technology is leveraged and supports the overall experience of both customers/users and employees.



## Customer/User Journey

Identifies what the customer is doing, in context, on what screen/device and for what purpose. Exposes thinking, feeling and doing.



## Employee Journey + Business Process

Identifies what the employees are doing to support the customer experience. Includes systems interaction, departmental hand-offs, data exchanges, direct customer contact, etc.



## Applications + Software

Identifies all of the behind the scenes applications and software necessary to support the customer and employee experiences.



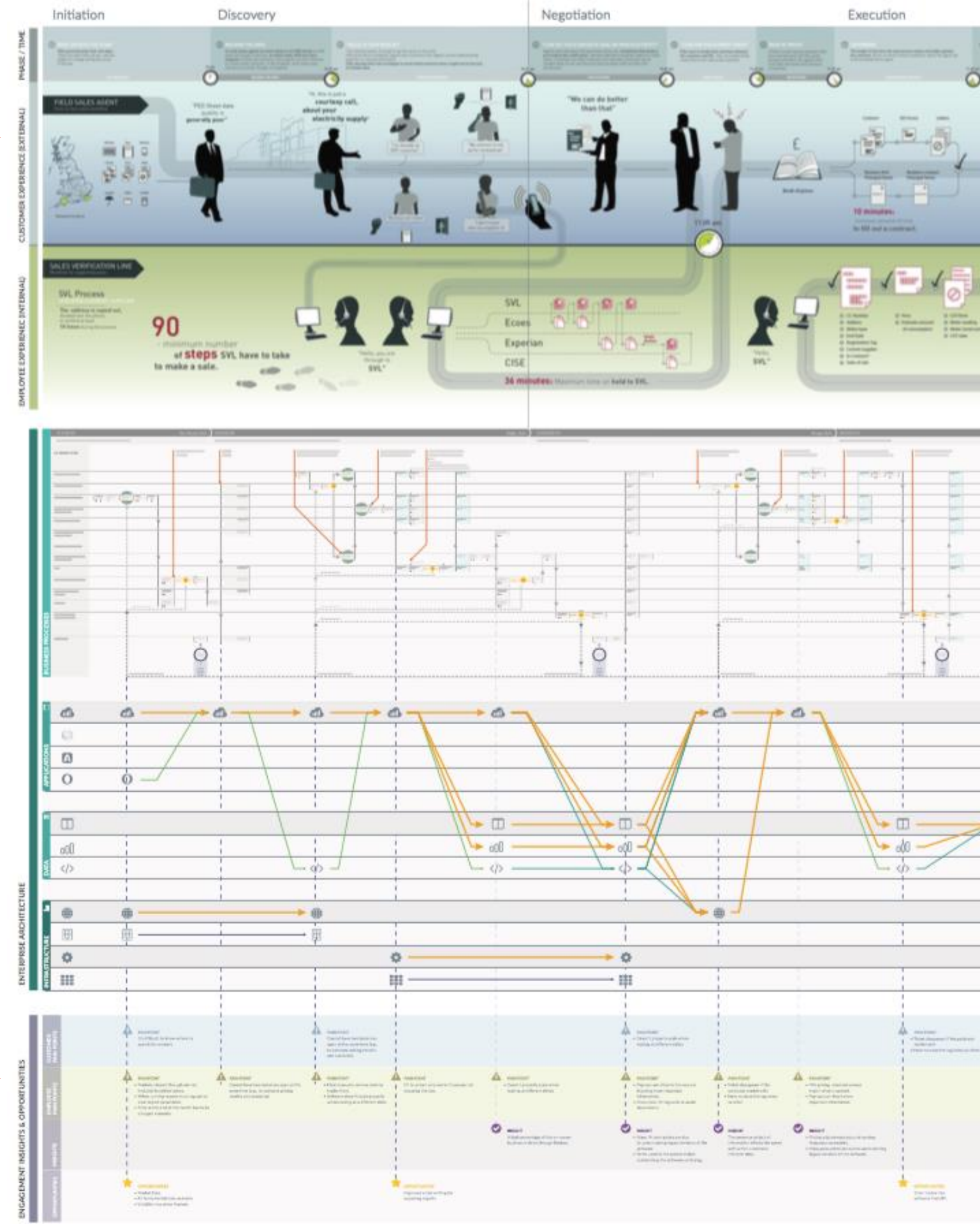
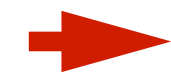
## Technology + Architecture

Identifies the technology stack and architecture that supports each customer and employee experience. Includes hand-offs, data exchanges, middle ware, etc.



## Opportunities + Pain Points

The drill down through the layers allows us to identify all pain points (customer, employee, technology) and provides guidance for making meaningful improvements.





# In Summary

- Customer expectations are continuously increasing
- Experiences are no longer discrete or bounded by device, application, time, or location
- Micro-moments have a disproportionately large impact on customer satisfaction
- Companies must codify and understand these micro moments and how to deliver a favorable experience
- Traditional techniques are necessary but not sufficient – they often do not provide the required linkages to draw out the importance of inter-dependencies among the layered attributes that go into delivering memorable experiences
- The intersections between business, user, and technology concerns can only be addressed by taking a holistic approach such as Engagement Blueprinting

## Engagement Blueprinting **IS**....

- A visual method for illustrating human journeys supported by key technology assets
- An effective way to capture human concerns of a process and to capture the inter-dependencies among layers in a traditional EA models
- A useful artifact for companies seeking to transform their customer experiences in an effort to drive higher engagement
- Best done by cross-disciplinary teams that represent design, architecture, business, and customer advocacy groups

## Engagement Blueprinting **IS NOT**....

- A replacement for use cases and requirements documents
- Suitable as a business architecture catalog or capabilities inventory
- A replacement for test cases
- A system interaction diagram
- A replacement for persona development and stakeholder analysis

PUTTING IT INTO PRACTICE

# Group Workshop



# Exercise – Blueprint the Open Enrollment Process

Use Case: See the handout provided

Pre-Requisites:

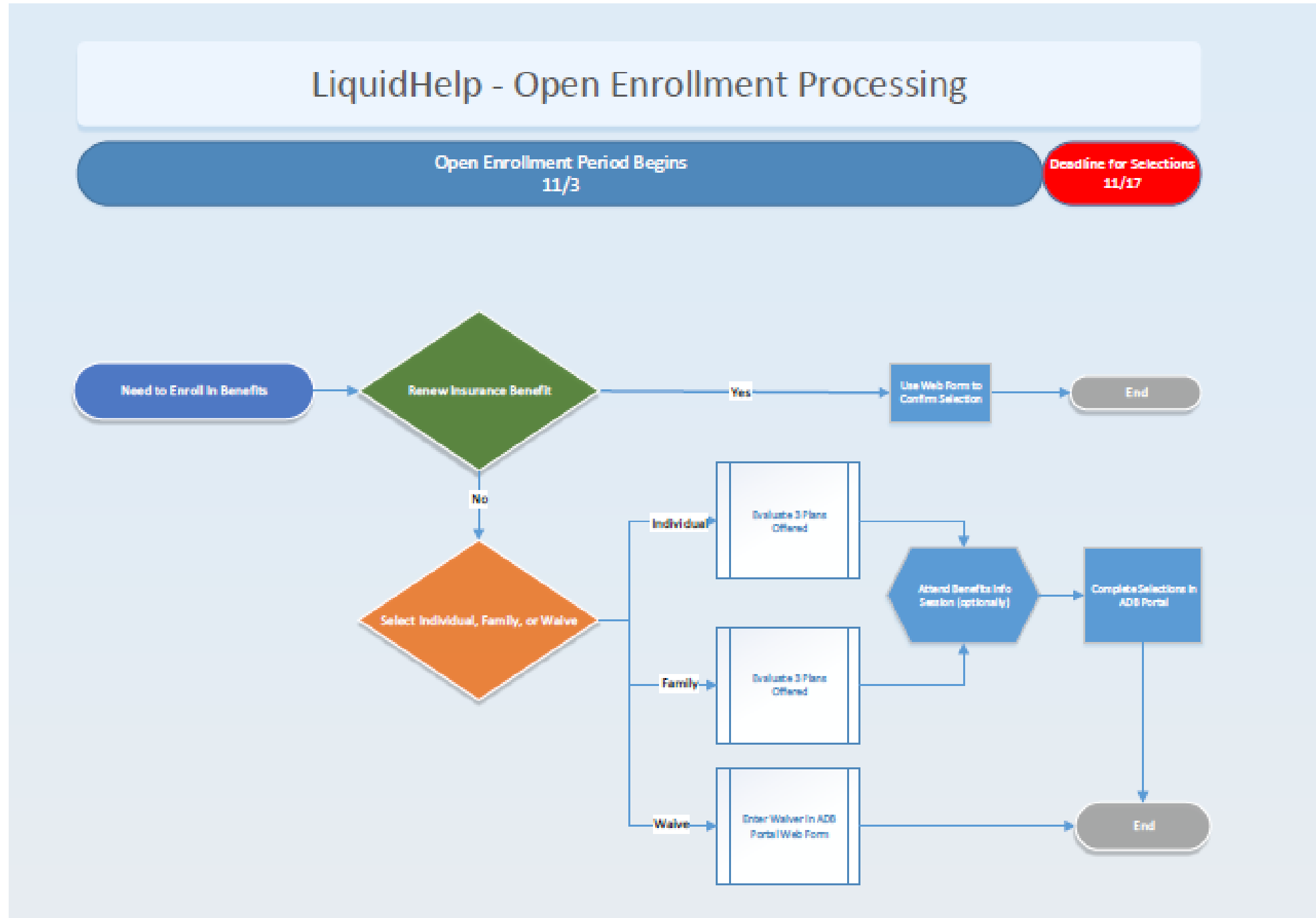
- Conduct Stakeholder Analysis, Name, Role, Email, Phone, include who should be included in each session
- Application Inventory – identify the provided technologies and applications
- Actor Catalog – develop personas, what are the unique needs, if any, for each of the actors
  
- Complete mapping – interview experts (business and technical)

*<Post first pass of the mapping.>*

Review and Feedback – Conduct facilitated session to elicit feedback and identify pain points.

Identify barriers, friction in the journey (both for the customer and for the employee), and potential opportunities to improve the experience

# Example Process Flow





## Initial Analysis

## Employee Experience

## Renewal Decision

Employee (indiv., family) →  
 Shop →  
 Select Plan →

- Analyze plan options
- Review Pricing

Site difficult to navigate

Who do I call for what?  
 HR vs. ABC Insurance

Renew

- Same Plan

OR

- Switch Plans

Email overload from HR

Confirmation of selections take too long

Comparing out of pocket expenses

Waive Coverage

**Pain Points:**

How often would employees like to be reminded?  
 Currently the Benefit Information Sessions are only offered during the day  
 Who should the employee call to ask questions?

Apps / Technology – Portal and email.

**Potential Opportunities / Areas for improvement:**

Develop Communication Campaign – based on channel and frequency. Offer evening Benefit Sessions.  
 Incentivize Employees to Complete in a Timely Manner – develop goals  
 Develop FAQs – for who to call for what (Payor vs. HR) to ask questions  
 Apps / Technology – build a wizard to compare plans based on projected out-of-pocket expenses. Enhance Portal to send an email confirming benefit selections.

# Exercise – Relating these concepts to your day-to-day

Next Steps:

Think of an initiative in your workplace where you can inform the related value and insights gleaned from this exercise.

Take a few moments to jot down ideas to take back and implement at your workplace.

What are the key drivers behind loyalty, engagement and lifelong relationships at your Company?



# Exercise – Tools – Facilitate the Feedback Session

## Rose. Bud. Thorn.

Use the colored Post-It notes to represent things that work well (pink)

Things that are opportunities (green)

And the things that are barriers (blue).



Place them directly on the images

Explanation: Please write a note as to why you put the note where you did.

# Template

EMOTIONS

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EMPLOYEE JOURNEY

---

APPS/TECHNOLOGY

---

DATA

---

OPPORTUNITIES/PAIN POINTS



Thank you.

**Peter Classon**

Partner  
Solutions, Sales Solutions  
+1 484 678 7310  
pclasson@liquidhub.com

**Daria DiTorro**

Senior Associate  
Strategy Studio  
+1 215 421 2710  
dditorro@liquidhub.com