Operationalizing
Customer Experience Initiatives

Applied Business Architecture

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STA Group
TODAY’S EXPERIENCE

Part 1: 20 Min.
Customer Experience Review
  • A Feud, a Definition & a Video

Customer Experience Logical Architecture
  • The Orchestrated CX Platform

Part 2: 10 Min.
Business Architecture & Customer Experience
  • Operationalizing Customer Experience Strategy

Part 3: 70 Min.
Team Exercise
  • Brainstorming, Voting, Designing, & Readout

Close: 15 Min.
Questions & Next Steps
We know Customers Are Important

The purpose of a business is to create, [service], and keep a customer.

It’s not the employer that pays the wages. Employers only handle the money. It is the customer who pays the wages.
THE NEW REALITY – CUSTOMERS CONTROL OUR DESTINY

500 Billion
Number of impressions U.S. customers make on one another about products and services each year.
–Forrester

They’re Empowered
“Companies were in control up until 2000. But now the customer is in the driver’s seat. If you embrace that, you will thrive. If not, then by 2020, you will not survive.”
–Jamie Nordstrom
But, What is Customer Experience?
customer experience

AN OUTSIDE-IN VIEW OF THE ACCUMULATION OF ALL EXPERIENCES AN INDIVIDUAL HAS WITH A SUPPLIER OF GOODS OR SERVICES, OVER THE DURATION OF THEIR RELATIONSHIP WITH THAT SUPPLIER.
CUSTOMER EXPERIENCE LIFE CYCLE

BUY
Market & Sell

OWN
Support & Serve

SELECT
FARE

1. NEED
2. RESEARCH
3. SELECT
4. PURCHASE
5. RECEIVE
6. USE
7. MAINTAIN
8. FEEDBACK

Front of the House
Back of the House

... all experiences over duration of their relationship
NOW A VIDEO: TERRY’S EXPERIENCE
CarTrack: Architecting Terry’s Experience

Oh No. My meeting!

Business Functions / ERP Systems (Mktg, Sales, Finance, Supply Chain, Legal...)

Profile Mgt.  Product Mgt.  Content Mgt.

Business Architecture Core Domains:
- Capability
- Value Stream
- Information
- Organization

Public Cloud  Private Cloud  Managed Services  Traditional IT
ORCHESTRATED CX PLATFORM: LOGICAL ARCHITECTURE

**Front of the House**
- Business Function / Operations Layer
  - Marketing
  - Sales
  - Supply Chain
  - Logistics
  - Partners & Supplier’s
  - Finance
  - Legal

**Back of the House**
- Infrastructure / Delivery Layer
  - Public Cloud
  - Private Cloud
  - Managed & On-Premise IT Services

**Channel Layer**
- Web
- Mobile
- Social
- Self Service
- Contact Center
- Transactions
- Out-Bound/Direct
- In Person

**Platform & Security Mgt.**
- Governance
- Risk
- Identity Mgt.

**Orchestration Layer**
- Customer Profile
- Engagement Mgt.
- Campaign Mgt.
- Context Mgt.
- Content Mgt.
- Conversion Admin.

**Business Insights**
- Analytics
- Reporting
- Big / Fast Data

**Customer Profile**
- Contact Admin.

**Business Functions / Operations Layer**
- Marketing
- Sales
- Supply Chain
- Logistics
- Partners & Supplier’s
- Finance
- Legal

**Infrastructure / Delivery Layer**
- Public Cloud
- Private Cloud
- Managed & On-Premise IT Services
customer experience: “the rest of the story”

An outside-in view of the accumulation of all experiences an individual has with a supplier of goods or services, over the duration of their relationship with that supplier, enabled by ...

The “platform” (business functions, people, processes, and data) necessary to support and create value from the individual’s experiences

REALIZING THE VALUE

Business Architecture: Operationalizing Customer Experience Strategy

CX Strategy  Operations  Technology

Business Architecture

Map Capabilities  Understand  Identify Information

Articulate Value  Transform Organization

CX Strategy  Communicate
TEAM EXERCISE

And Deliverable (Readouts)

- Exercise: 50 Minutes / Team
- Deliverable: Customer Experience Design Worksheet
- Readout: 2 Minutes Each
CORE BUSINESS ARCHITECTURE DOMAINS – EXERCISE FOCUS

(1) Capabilities
(2) Information
(3) Value Streams

Organization
What are the most critical components to operationalizing an organization’s customer experience strategies?

1) CAPABILITY  2) INFORMATION  3) VALUE STREAM

Within Your Assigned Team Core Business Architecture Domain (1, 2 or 3 above)

Answer the Question:
**STEP 1: SELECT TEAM LEAD [ 1 MIN ]**

Answer the Question:

What are the the most critical COMPONENTS to operationalizing an organization’s customer experience strategies?

**OVERVIEW (45 Minutes TIMED ACTIVITY)**

- Teams of 6 – 10 individuals
- Each Team is Assigned ONE Core BA DOMAIN
- Select 1 Team Lead: “Keeps Team Moving” towards deadline
- Highly Interactive/ Relationship Development
- No Right or Wrong Answers
- **Output:** CX Design Worksheet (Hardcopy & Softcopy)
### STEP 2: BRAINSTORM 15 – 20 DOMAIN COMPONENTS [ 9 MIN ]

Team Lead: Use Flip Chart Provided

What are the the most critical COMPONENTS to operationalizing an organization’s customer experience strategies?

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<thead>
<tr>
<th>No.</th>
<th>Front of House (FOH)</th>
<th>Back of House (BOH)</th>
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</thead>
<tbody>
<tr>
<td>1</td>
<td>List components randomly</td>
<td>Do Not try to prioritize ... yet</td>
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<tr>
<td>2</td>
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<td>3</td>
<td>Minimum of 10 captured</td>
<td>Stop when / if 20 captured</td>
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<td>Must Have 5 FOH minimum</td>
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Must have at least 5 FOH and BOH components listed
**STEP 3: SELECT YOUR TOP 10 – VOTING [ 5 MIN ]**

Team Lead Facilitates – Use Show of Hands

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<th>No.</th>
<th>Votes</th>
<th>Front of House (FOH)</th>
<th>Votes</th>
<th>Back of House (BOH)</th>
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</thead>
<tbody>
<tr>
<td>1</td>
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<td>Rapid Fire Voting</td>
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<td>Use Show of Hands to vote</td>
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<td>Break ties after all votes taken</td>
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<td>Must Have 2 FOH minimum</td>
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Must select at least 2 FOH and BOH components in top 10
STEP 4: PRIORITIZE YOUR TOP 10 – VALUE .VS. EFFORT [ 15 MIN ]

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<tr>
<th>Number</th>
<th>Component Name/Description</th>
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- **FOH**
- **BOH**
## STEP 5: DEVELOP CX DESIGN WORKSHEET [ 15 MIN ]

<table>
<thead>
<tr>
<th>Customer Experience &amp; Business Architecture: DESIGN WORKSHEET</th>
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</thead>
<tbody>
<tr>
<td>Perspective: <strong>FOH (Front-of-House)</strong> / <strong>BOH (Back-of-House)</strong></td>
</tr>
<tr>
<td>BA Domain: &gt;&gt; Capability &lt;&lt;</td>
</tr>
</tbody>
</table>

### WE BELIEVE:
- Personalization Management: a critical [FOH / BOH] CX **Capability** (critical FOH/BOH Component)

### REQUIRING INPUT OF:
- User Information, Channel (Web, Mobile, Self Service, etc.), Physical Device (tablet, phone, laptop, in-person), & Geo-Location (Data, Information, People, Process, Technology)

### WITH MAPPING TO:
- CX Channels, Business Units, Stakeholders, Customer Types and Value Streams (BA artifacts/blue prints – i.e. org., strategy, value stream, customer segment, solution, etc.)

### ESTABLISHES LINE OF SIGHT TO:
- cross-channel customer interactions and the organization’s ability to identify and provide a consistent experience to the customer (customer 360). (overall CX business problem / opportunity)
THE GUILD
CUSTOMER EXPERIENCE COMMUNITY

Where to We Go From Here
THANK YOU

QUESTIONS

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