

Date: Thursday 10th August, at 10am
Participant: James from Edita (Partner/reseller)

1.

Q: What's your role at Edita?

CX consultant. Find out what customer needs and create rules/templates on the platform.
Semi-technical.

2.

Q: What are your responsibilities in terms of CX?
e.g., journey mapping, data analysis, journey visualisation, creating personalised experiences,

Workshops with customers about journeys they want to enhance.
First fix the "designed" journeys that are broken, this is the easiest thing to do and builds trust with the client.
Then think about orchestrating new ones.
Looking at Sankeys.

3.

Q: What tooling do you use?
Generally, and also specific to help with CX tasks.

MS Office, Miro, Slack, Teams, Power BI, Salesforce, MS Dynamics CRM,
Wrike (project management),
Bloomreach (marketing automation and personalisation)

4.

Q: Your Goals:
What are you trying to achieve in terms of CX? What are your goals?

Listen to traffic.
Fix existing problems with the platform.
Look for user patterns:
Find where users are getting 'lost' or have negative feedback.
Guide users back to the journey. Guide them to the right place.

5.

Q: What problems are you trying to solve?
What challenges do you face in trying to solve those problems?
e.g., finding journeys, creating segments, multiple sources of data,



Digging into the data (Sankey), I want to see and explore where users are going when they stray/deviate from the intended (designed/ideal) journey path.
Ability to select more than 1 (2-4) locations on the Sankey, to explore. Not just the start or end point.

Setting the depth of the Sankey only shows the most visited locations (the biggest nodes), but the one you're interested in might not be the biggest one.

Sankeys are good, but they're too noisy.

I usually clean them up using photoshop or chrome dev tools, to present to business users.

I'd like the ability to 'hide' nodes: 'hide this node' button that moves/merges its traffic to the 'other events' (grey) node.

I want to click on nodes to drill-in to them.

6.

Q: What CX tasks do you perform?



Rule builder, similar to marketing automation tools (e.g., Act-On and Bloomreach, which both use 'canvas' style UI for automation), but the learning curve is greater.

7.

Q: What are your CX KPIs and metrics?

KPIs depend on the customer.

Customer led.

Usually NPS.

8.

Q: Do you use our product?

Using for 1.5 years, ad hoc.

9.

Q: What do you want to get out of using our platform?

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10.

Additional notes:
I want more guided usage. The platform doesn't look modern/fresh.

How were you doing it before?

What challenges did you face?

How can we help?