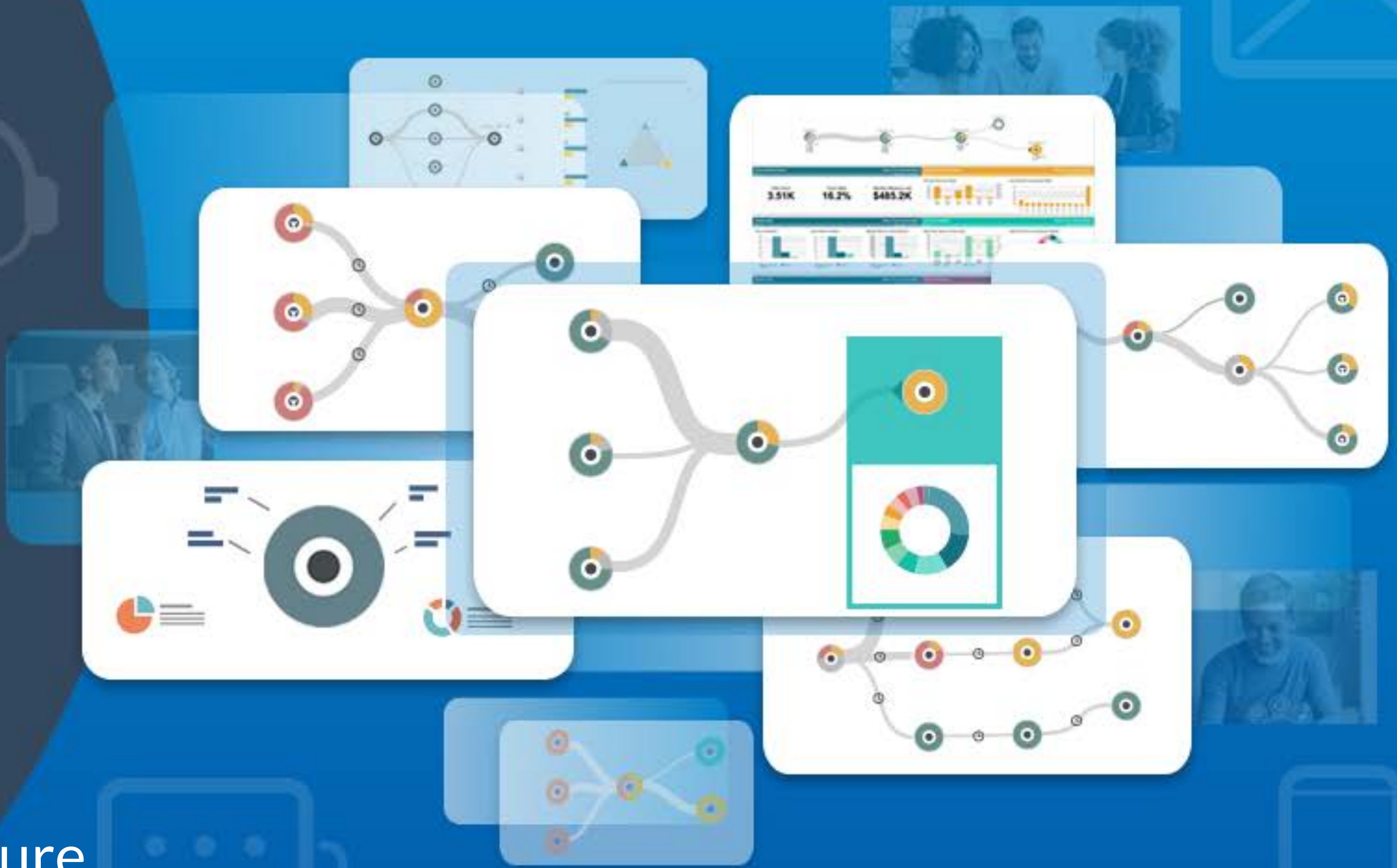
How CX Leaders Succeed With Journey Analytics: 8 Real-Life Use Cases & Success Stories



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Chris Field
Director of Solutions Architecture
Pointillist

About the Speaker

Chris Field

Director of Solutions Architecture, Pointillist

Chris works with leading CX, analytics and marketing teams to solve real-world problems using customer journey analytics. He specializes in the use of analytics across a diverse set of industries, including financial services, telecommunications and defense. Chris is a member of the National honors Societies for Mathematics, Engineering, and Electrical Engineering. He has a bachelors in Electrical Engineering from the University of Maine, and a Masters in Financial Engineering from NYU.

Agenda

1 Why are leading CX teams adopting customer journey analytics, and what is it *really*?

2 8 Real-Life Use Cases & Success Stories

3 Q&A Session

Today’s CX Teams Face an Uphill Battle

Complex Customer Journeys

Data Silos

Digital Transformation

Intense Competition

Legacy Technology

Steep Customer Expectations

What do CX teams need to do in order to adapt, and overcome these challenges and thrive in today’s harsh environment?

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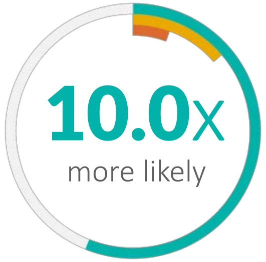
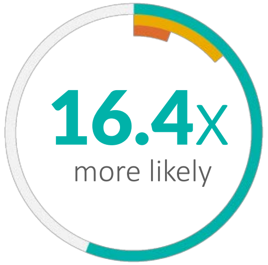
High-Performing Vs Underperforming CX Teams

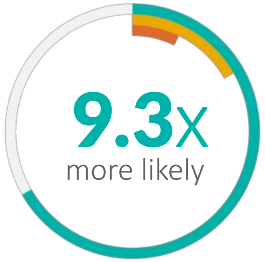
Integrating data across all tools & systems into a unified view of customers' journeys



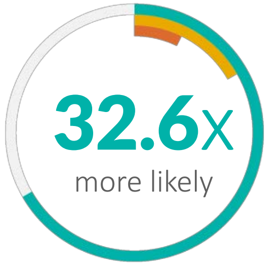
Rapidly generating actionable customer insights



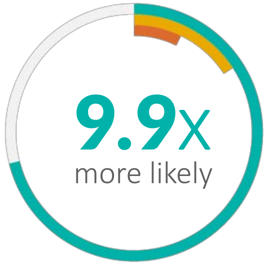
Analyzing multiple customer interactions across channels and over time



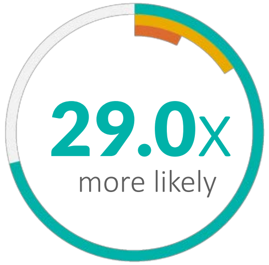
Taking action on insights to make a quantifiable business impact



Engaging customers with the right experiences at the right times through their preferred channels



Quantifying the impact of CX on business KPIs like revenue, churn, lifetime value etc.



🟩 High Performers 🟨 Average Performers 🟧 Underperformers

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What is Customer Journey Analytics?

"An analytics practice that combines quantitative and qualitative data to analyze customer behaviors and motivations across touchpoints and over time to optimize customer interactions and predict future behavior."

FORRESTER®

Customer Data Integration & Unification

Customer Journey Visualization

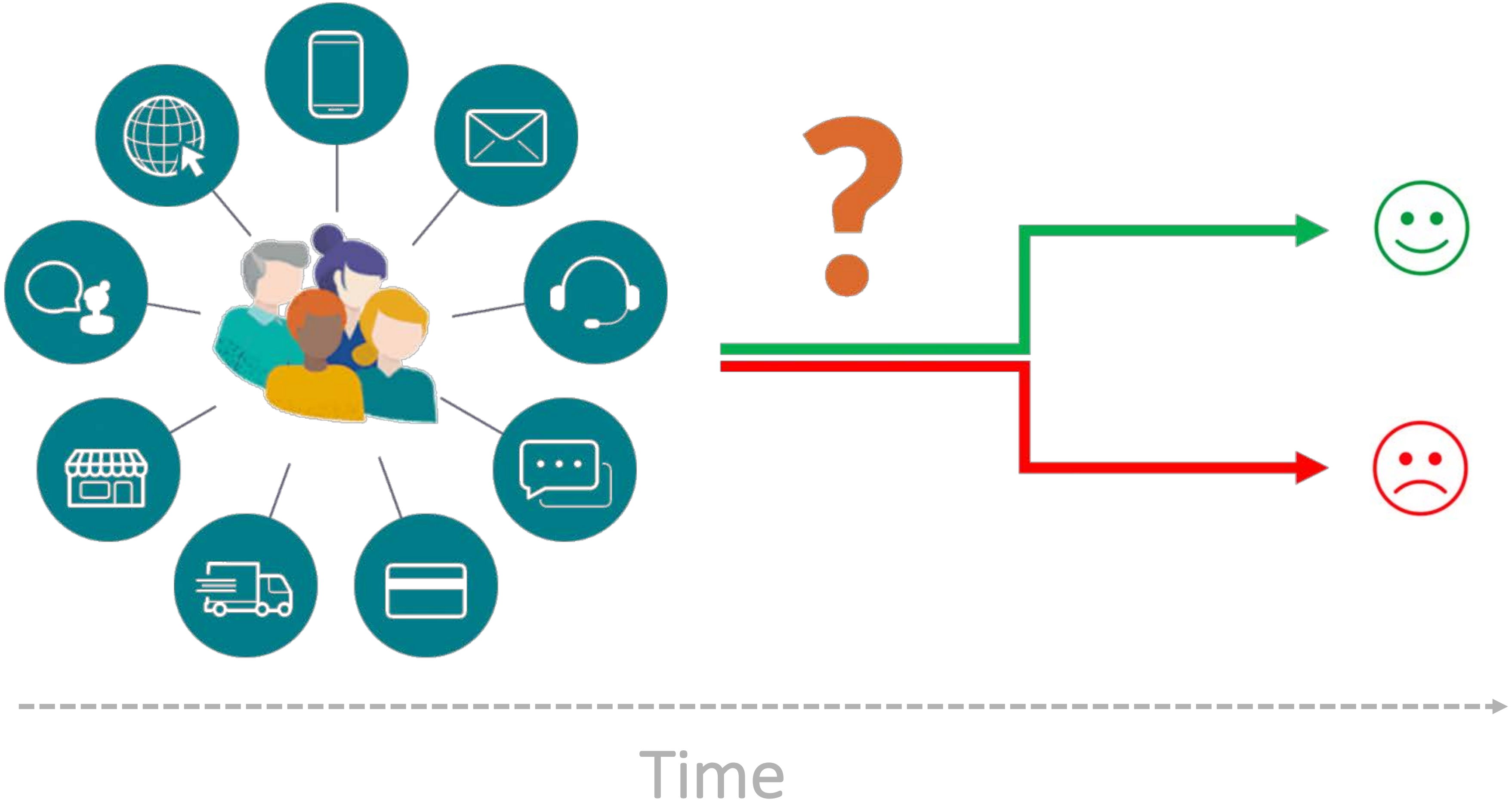
Journey-Based Metrics & KPIs

Artificial Intelligence & Machine Learning

Behavioral Segmentation

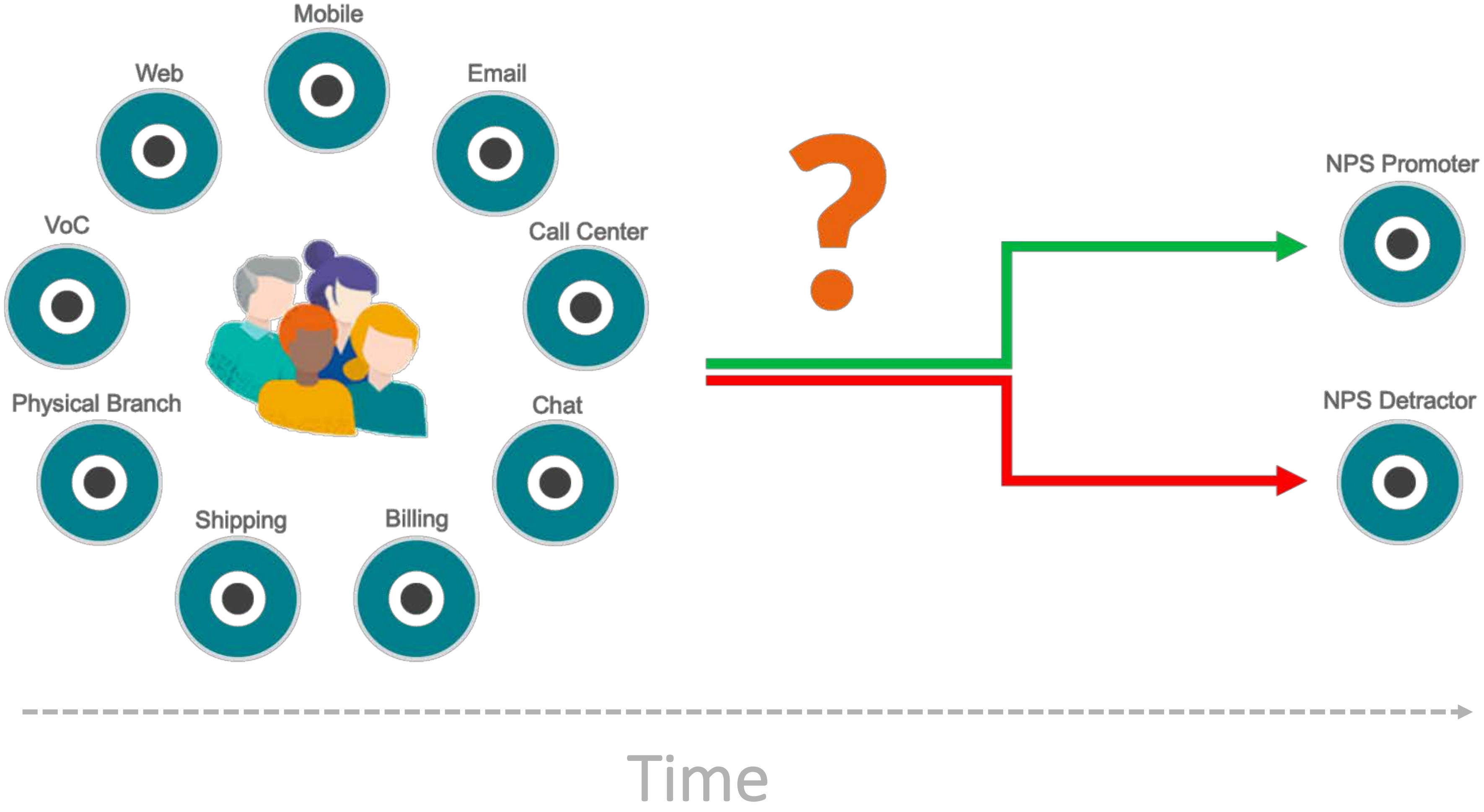
Personalized Customer Engagement Orchestration

Customers interact across channels over time…what happened?



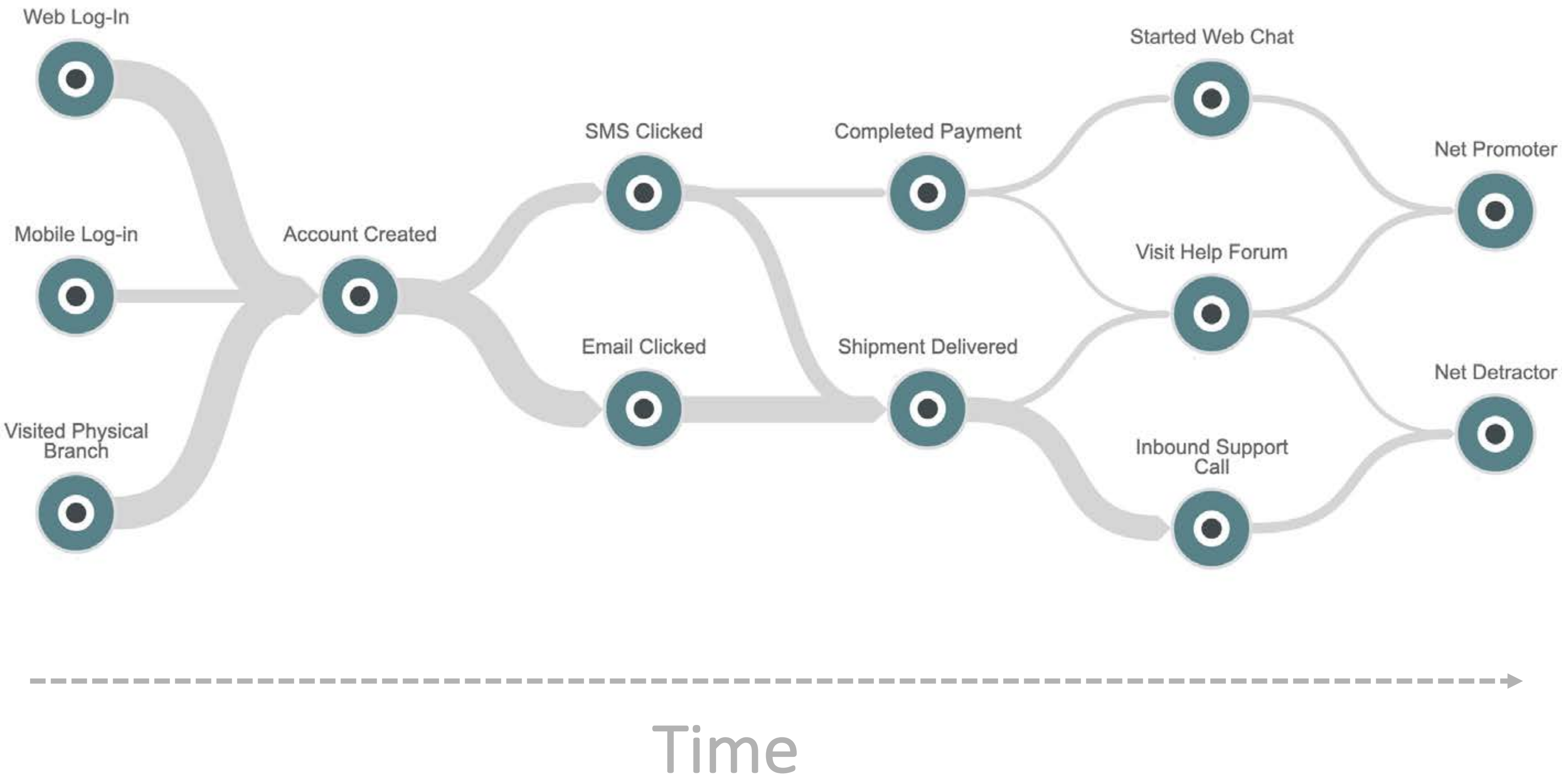
Your customers interact with your company across a wide variety of channels over time, and then eventually, some end up happy customers, some unhappy customers. What happened?

Customers interact across channels over time…what happened?


Mobile
Web
Email
VoC
Call Center
Physical Branch
Chat
Shipping
Billing
?
NPS Promoter
NPS Detractor
Time

A journey analytics platform integrates & unifies interaction data across all your tools, systems and channels and uses identity resolution to stitch these interactions together into cross-channel journeys.

Customers interact across channels over time…what happened?


Web Log-In
Mobile Log-in
Visited Physical Branch
Account Created
SMS Clicked
Email Clicked
Completed Payment
Shipment Delivered
Started Web Chat
Visit Help Forum
Inbound Support Call
Net Promoter
Net Detractor
Time

A journey analytics platform enables you to visualize how your customers flow between these interactions over time…

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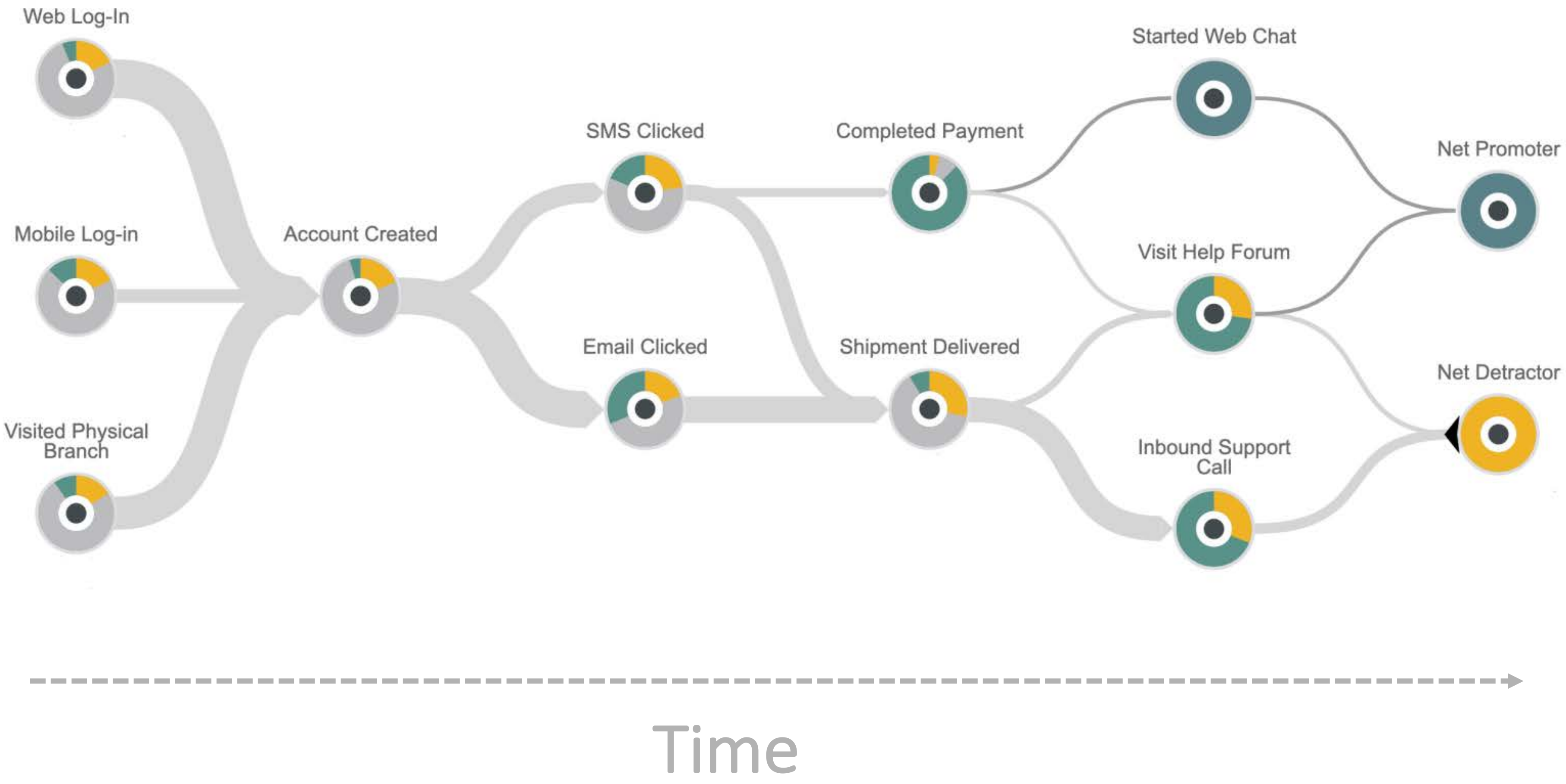
Customers interact across channels over time…what happened?


Web Log-In
Mobile Log-in
Visited Physical Branch
Account Created
SMS Clicked
Email Clicked
Completed Payment
Shipment Delivered
Started Web Chat
Visit Help Forum
Inbound Support Call
Net Promoter
Net Detractor
Time

And then allows you to look back across every interaction in the journey to help you understand what went right and what went wrong, as well as which experiences had the largest impact along the way.

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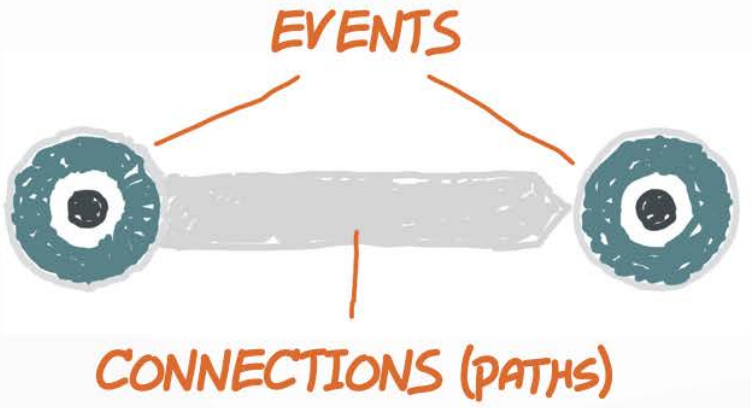
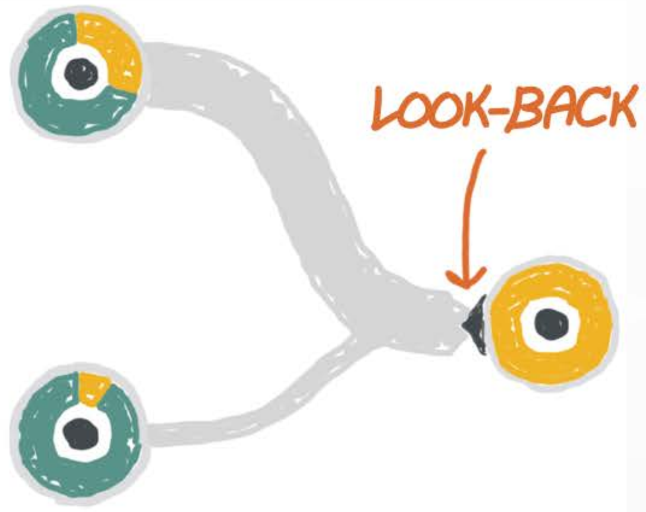
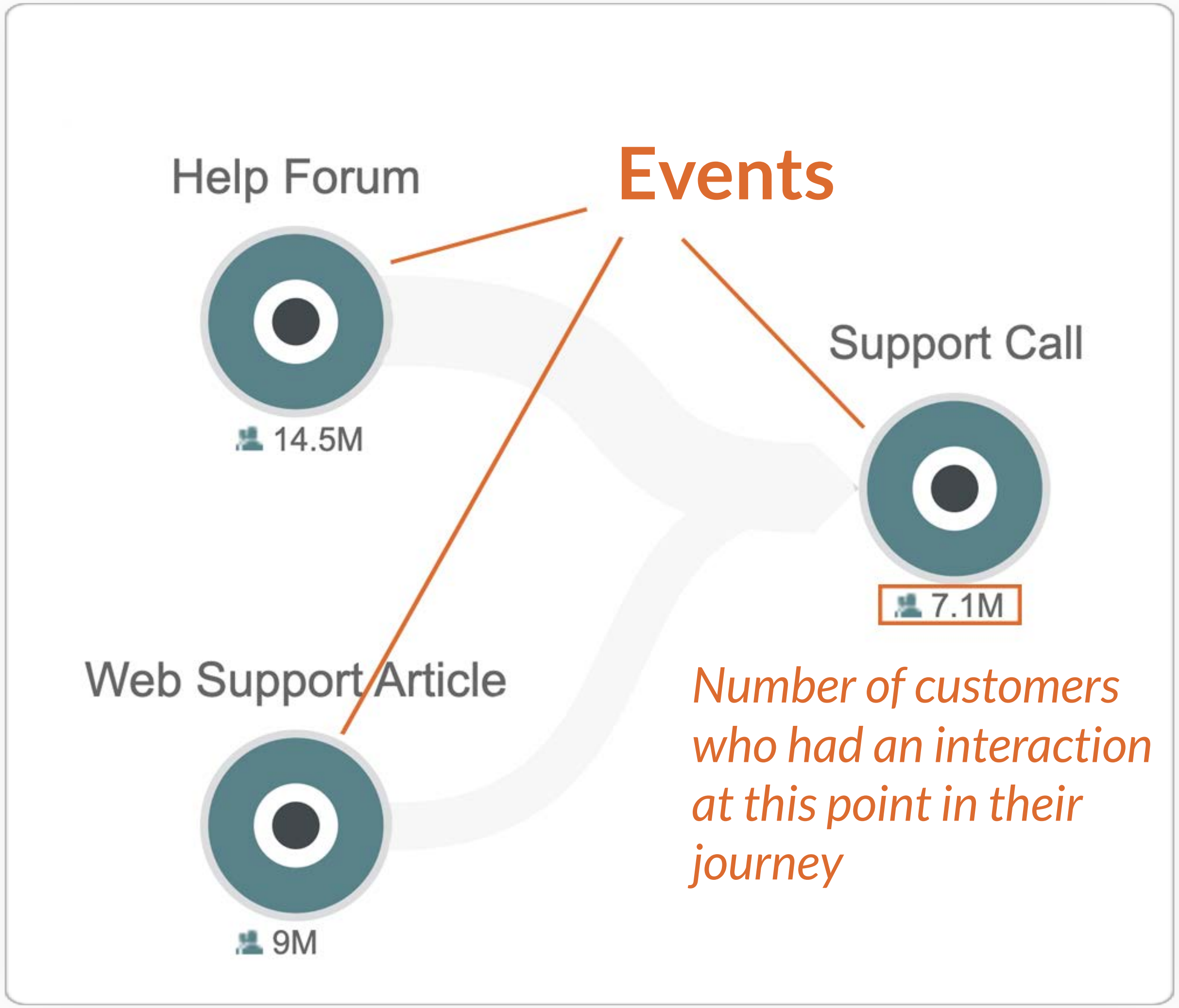
Pointillist Journey Analytics Basic Concepts

How to make sense of the journey visualizations in this preso


EVENTS
CONNECTIONS (PATHS)

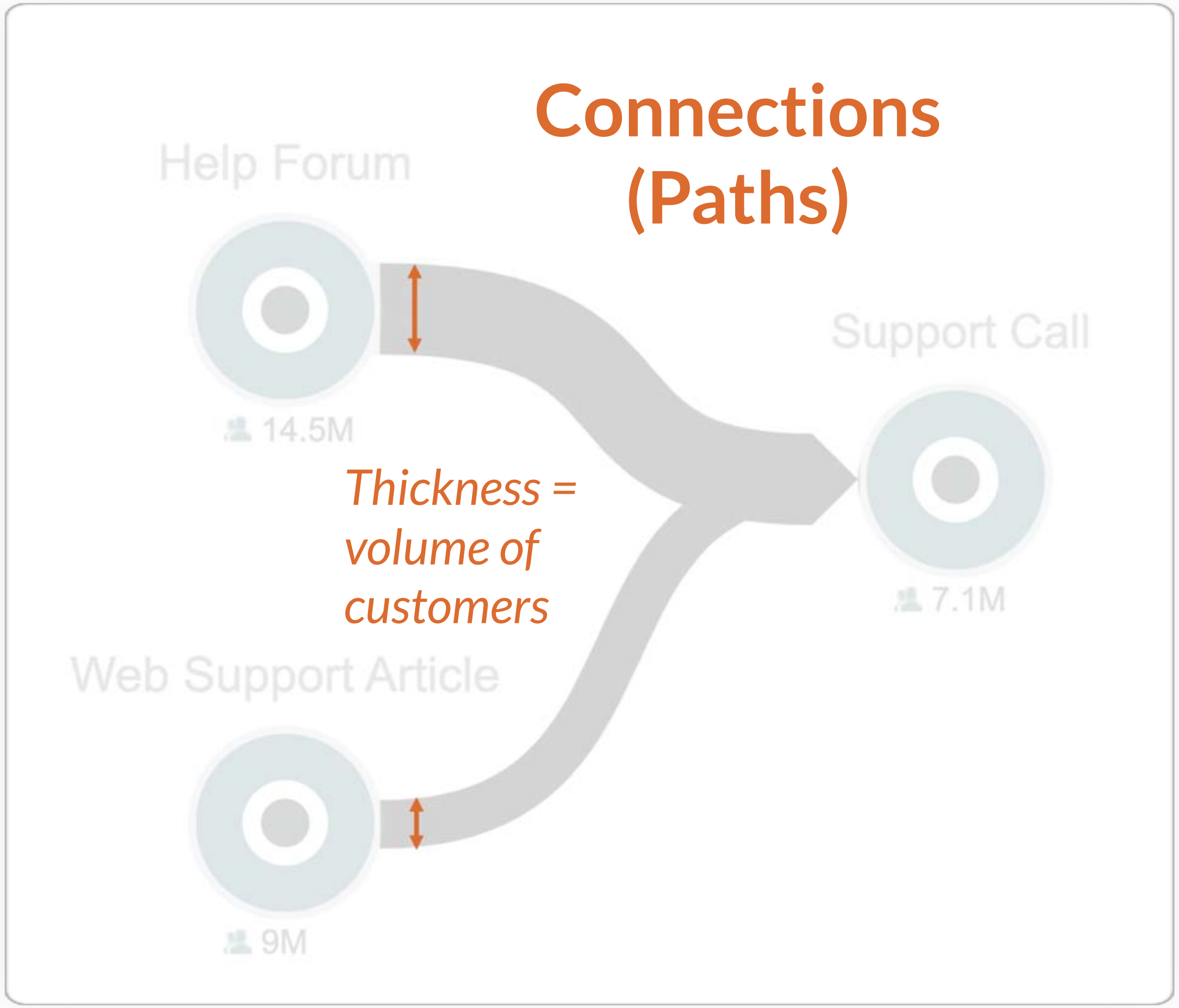


Pointillist Journey Analytics Basic Concepts


Help Forum
14.5M
Support Call
7.1M
Web Support Article
9M

Events

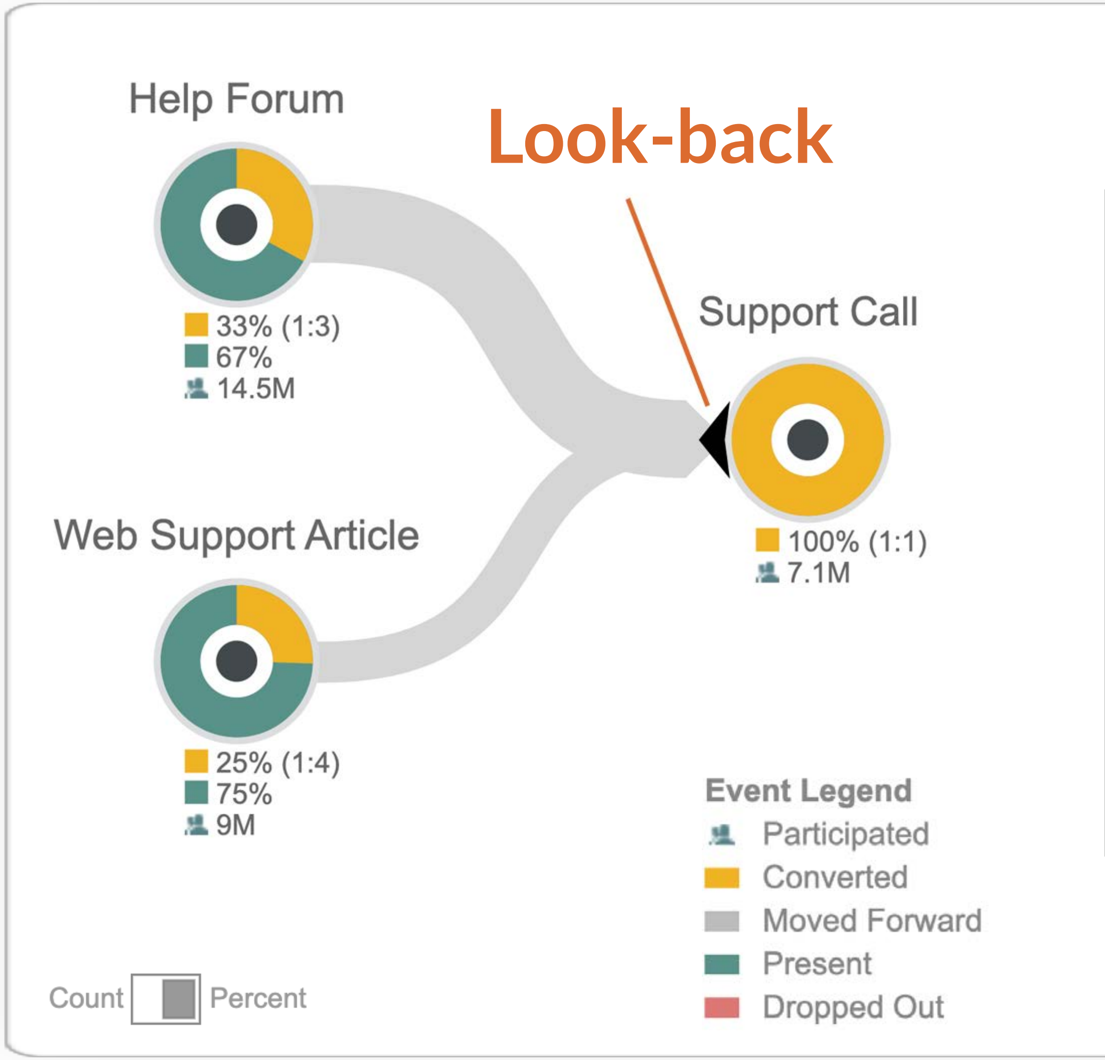
Number of customers who had an interaction at this point in their journey


Help Forum
14.5M
Support Call
7.1M
Web Support Article
9M

Connections (Paths)

Thickness = volume of customers

Pointillist Journey Analytics Basic Concepts


Help Forum
🟨 33% (1:3)
🟩 67%
14.5M
Look-back
Support Call
🟨 100% (1:1)
7.1M
Web Support Article
🟨 25% (1:4)
🟩 75%
9M
Event Legend
Participated
Converted
Moved Forward
Present
Dropped Out
Count
Percent

A look-back shows the number or percentage of customers at each prior Event who stayed, moved forward or completed the journey.

What is Customer Journey Analytics, *Really*?

Discovery
Engagement
Dashboards
Email Offer
SMS Offer
Direct Mail Offer
View Offer Landing Page
Apply via Website
Apply at Branch
Execute Application
Approve Card
Deny Card
Charts
310.8K
CREATE NEW CHART

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Primary Customer Journey Analytics Use Cases

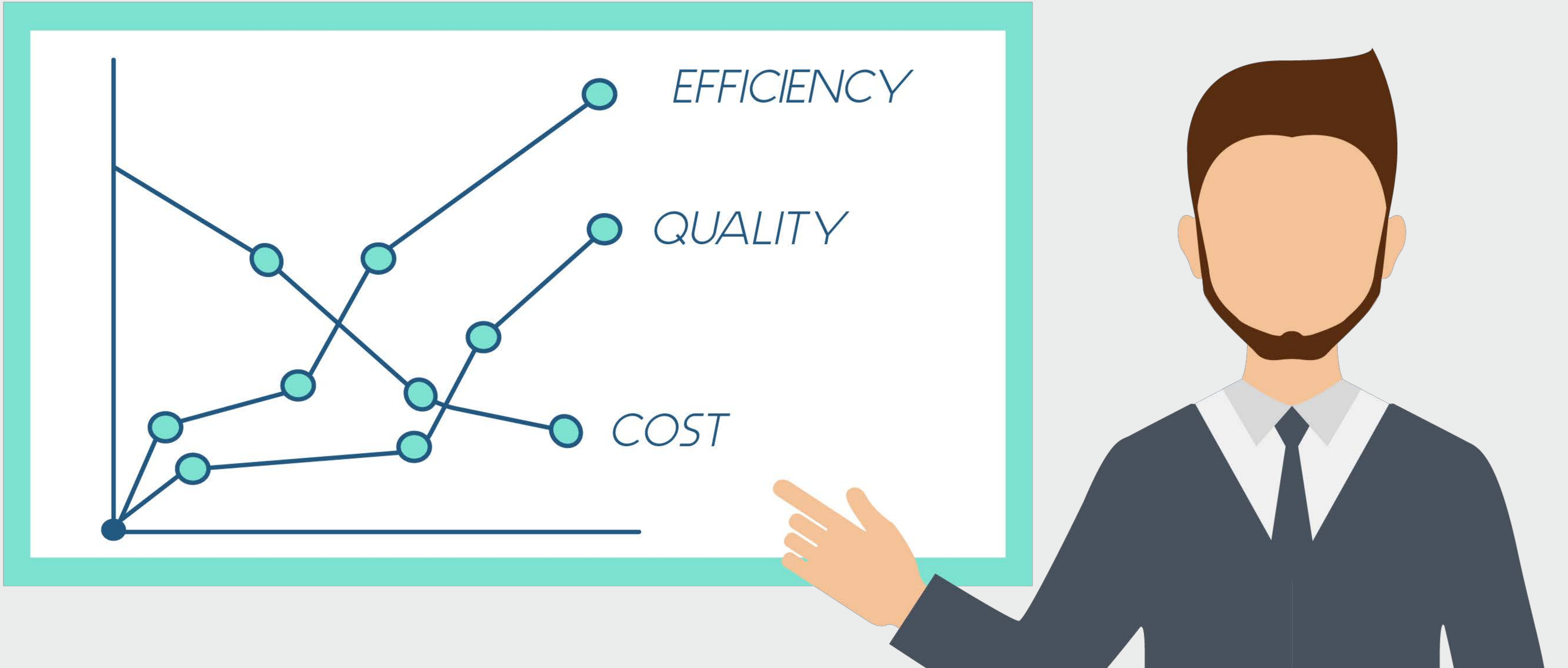
Operational Efficiency & Cost Savings

CX Measurement & Improvement

Revenue Growth

Customer Loyalty: Retention & Churn

Operational Efficiency & Cost Savings

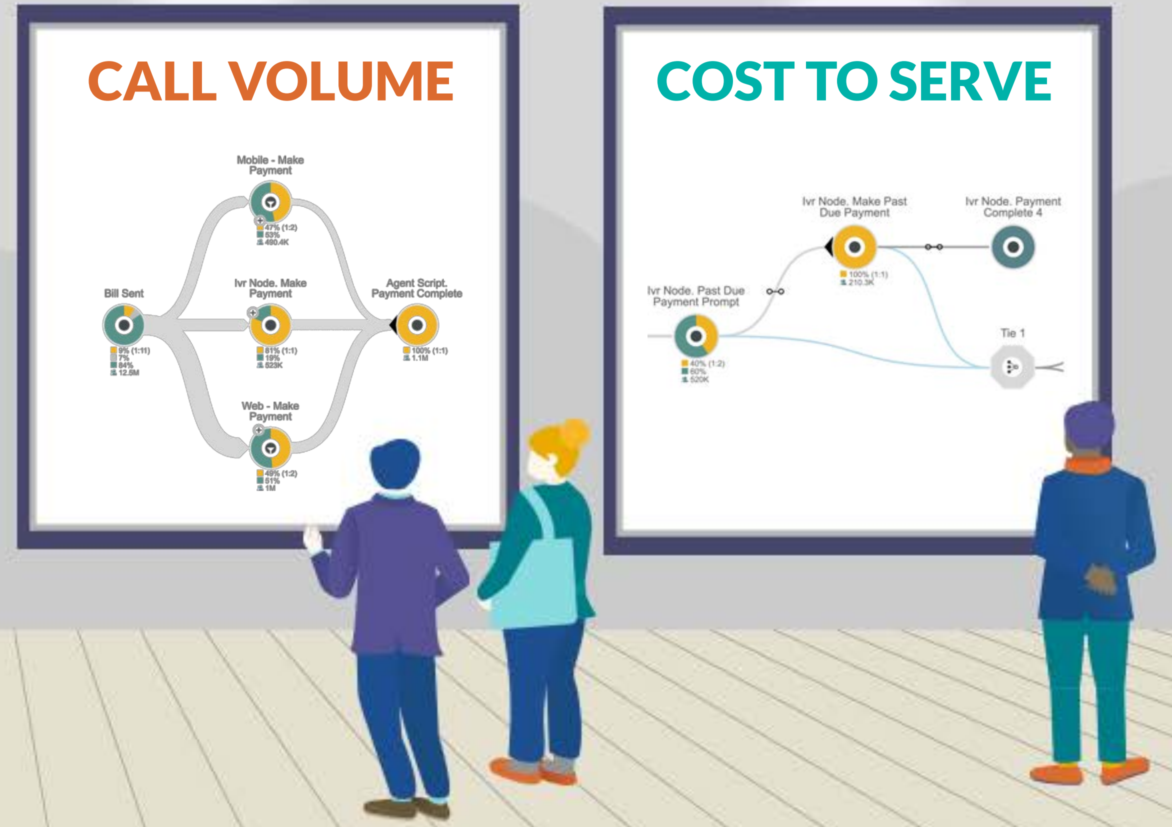

EFFICIENCY
QUALITY
COST

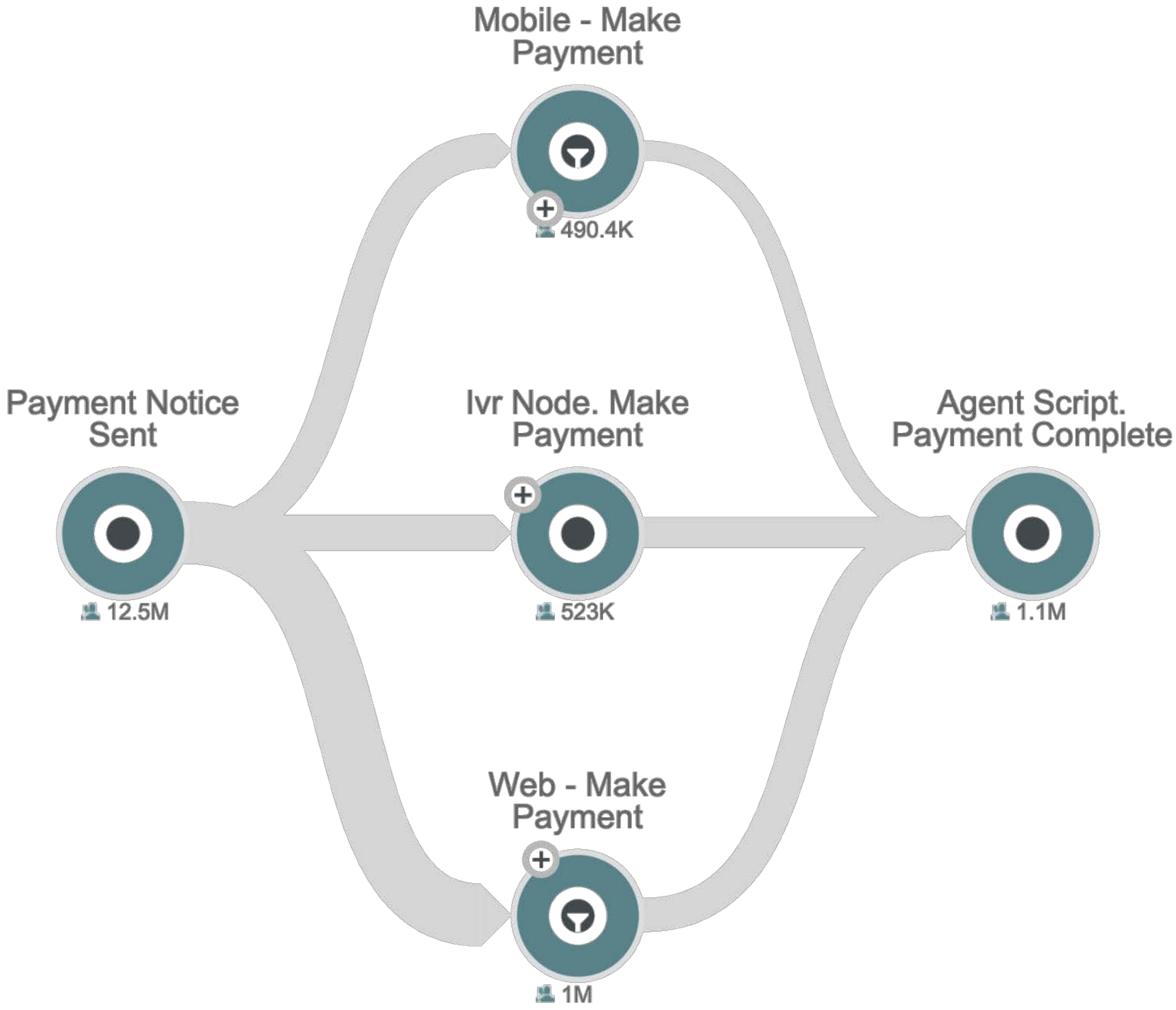
Operational Efficiency & Cost Savings

Decrease Support Call Volume & Spend

Industry:
Financial Services

Summary:
A retail bank uses customer journey analytics to uncover the cause of new client service calls and increase operational efficiency.

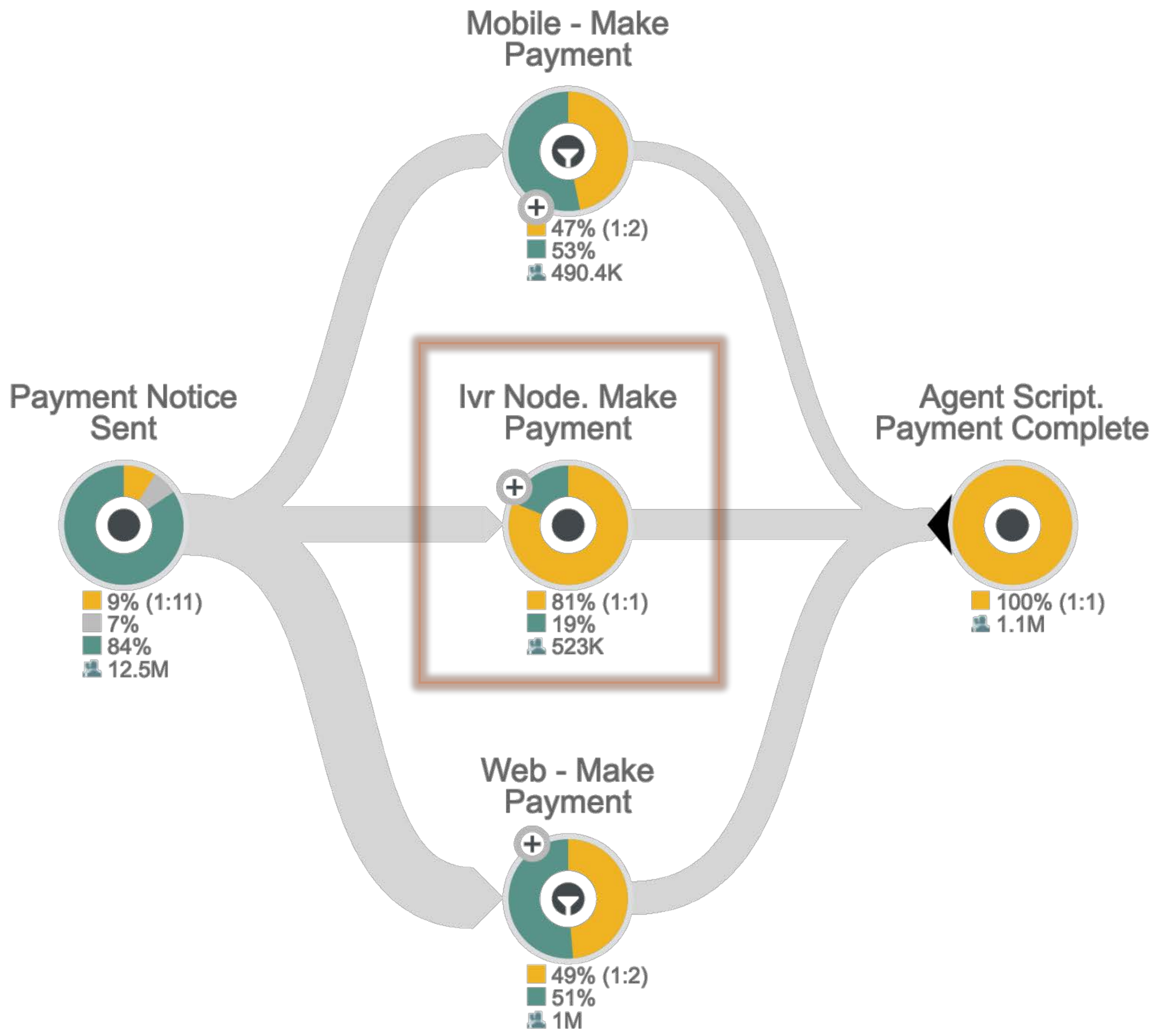

CALL VOLUME
Mobile - Make Payment
47% (1:2)
53%
490.4K
Bill Sent
9% (1:11)
7%
84%
12.5M
Ivr Node. Make Payment
81% (1:1)
19%
523K
Agent Script. Payment Complete
100% (1:1)
1.1M
Web - Make Payment
49% (1:2)
51%
1M
COST TO SERVE
Ivr Node. Make Past Due Payment
100% (1:1)
210.3K
Ivr Node. Payment Complete 4
Ivr Node. Past Due Payment Prompt
40% (1:2)
60%
520K
Tie 1


Mobile - Make Payment
490.4K
Payment Notice Sent
12.5M
Ivr Node. Make Payment
523K
Agent Script. Payment Complete
1.1M
Web - Make Payment
1M

How effective are different self-service channels for customers setting up mortgage payments?

Operational Efficiency & Cost Savings

Decrease Support Call Volume & Spend


Mobile - Make Payment
47% (1:2)
53%
490.4K
Payment Notice Sent
9% (1:11)
7%
84%
12.5M
Ivr Node. Make Payment
81% (1:1)
19%
523K
Agent Script. Payment Complete
100% (1:1)
1.1M
Web - Make Payment
49% (1:2)
51%
1M

The team finds that IVR is the least effective self-service channel for setting up payments, with 81% leakage to a Service Agent.

Operational Efficiency & Cost Savings

Decrease Support Call Volume & Spend

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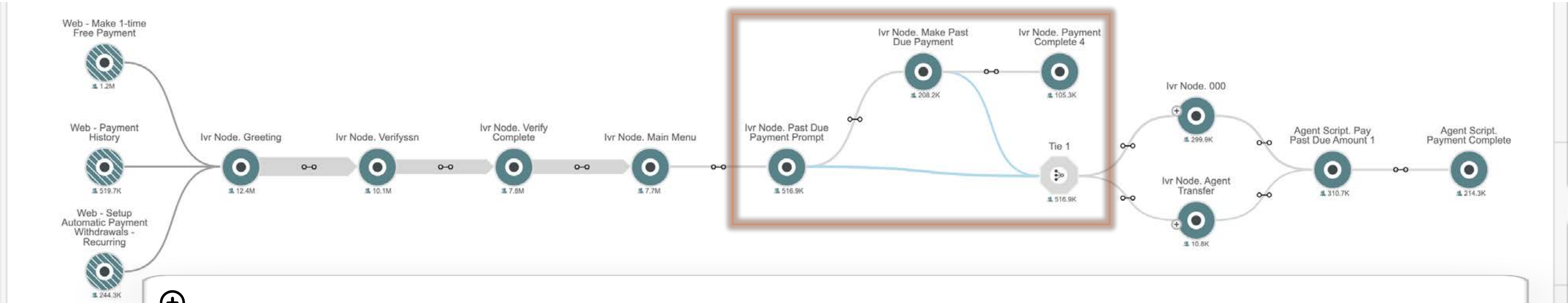
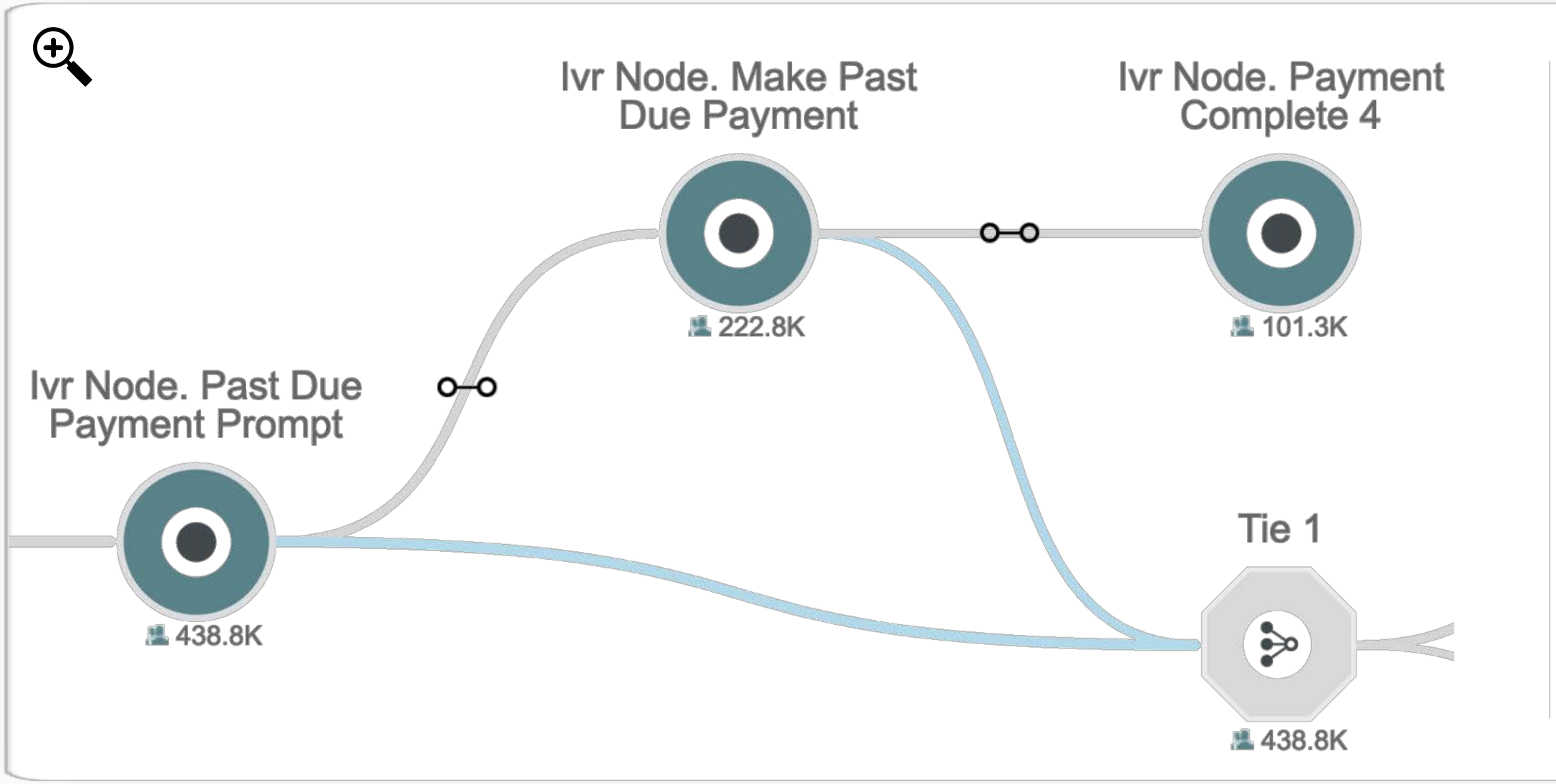

Web - Make 1-time Free Payment
1.2M
Web - Payment History
519.7K
Web - Setup Automatic Payment Withdrawals - Recurring
244.3K
Ivr Node. Greeting
12.4M
Ivr Node. Verifyssn
10.1M
Ivr Node. Verify Complete
7.8M
Ivr Node. Main Menu
7.7M
Ivr Node. Past Due Payment Prompt
516.9K
Ivr Node. Make Past Due Payment
208.2K
Ivr Node. Payment Complete 4
105.3K
Tie 1
516.9K
Ivr Node. 000
299.9K
Ivr Node. Agent Transfer
10.8K
Agent Script. Pay Past Due Amount 1
310.7K
Agent Script. Payment Complete
214.3K

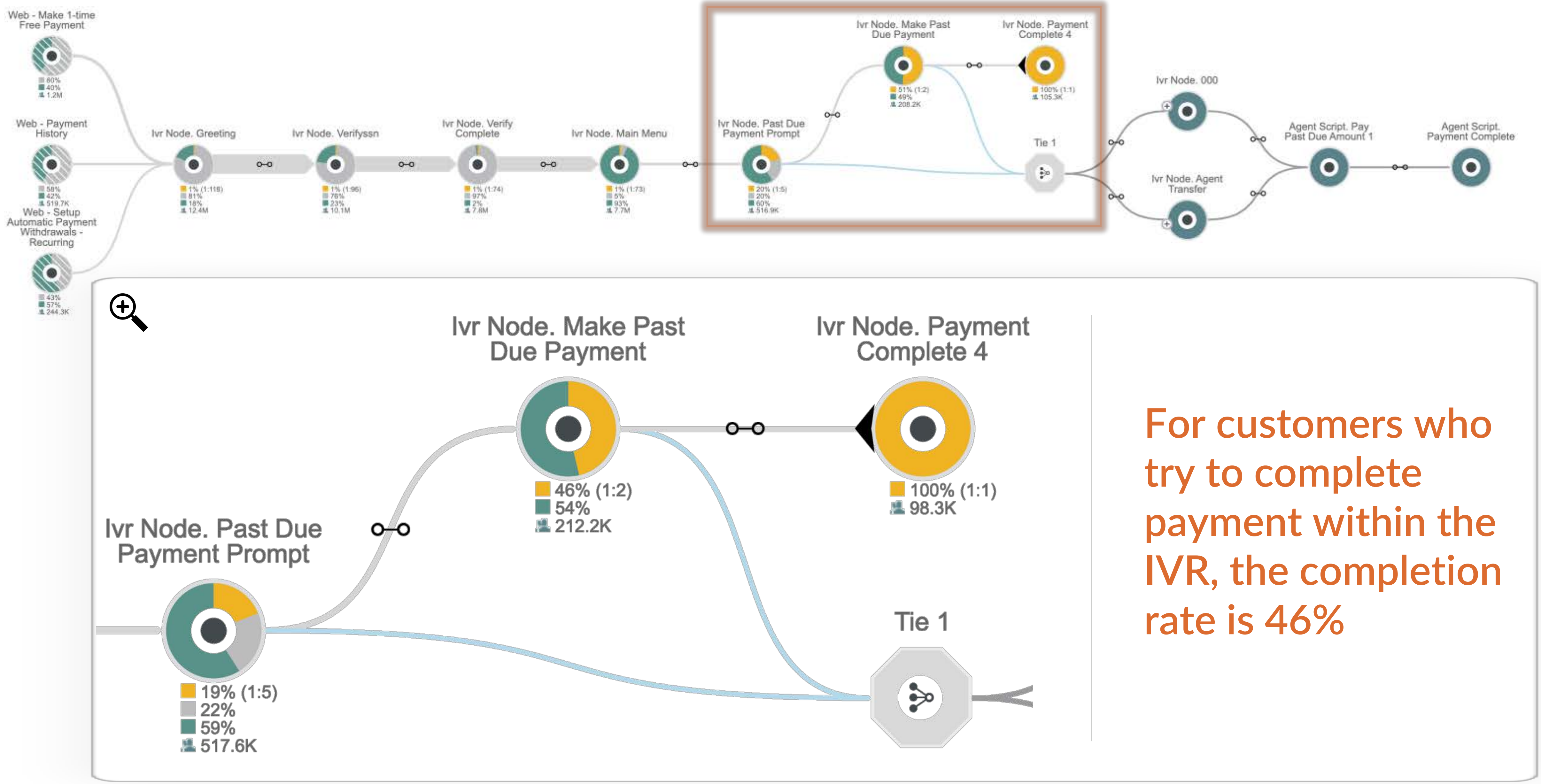

Ivr Node. Make Past Due Payment
222.8K
Ivr Node. Payment Complete 4
101.3K
Ivr Node. Past Due Payment Prompt
438.8K
Tie 1
438.8K

The team analyzes leakage by zooming in on the specific steps of the IVR micro-journey.

Operational Efficiency & Cost Savings

Decrease Support Call Volume & Spend

Pointillist


Web - Make 1-time Free Payment
60%
40%
1.2M
Web - Payment History
58%
42%
519.7K
Web - Setup Automatic Payment Withdrawals - Recurring
43%
57%
244.3K
Ivr Node. Greeting
1% (1:118)
81%
18%
12.4M
Ivr Node. Verifyssn
1% (1:96)
76%
23%
10.1M
Ivr Node. Verify Complete
1% (1:74)
97%
2%
7.8M
Ivr Node. Main Menu
1% (1:73)
5%
93%
7.7M
Ivr Node. Past Due Payment Prompt
20% (1:5)
20%
60%
516.9K
Ivr Node. Make Past Due Payment
51% (1:2)
49%
208.2K
Ivr Node. Payment Complete 4
100% (1:1)
105.3K
Tie 1
Ivr Node. 000
Ivr Node. Agent Transfer
Agent Script. Pay Past Due Amount 1
Agent Script. Payment Complete
Ivr Node. Make Past Due Payment
46% (1:2)
54%
212.2K
Ivr Node. Payment Complete 4
100% (1:1)
98.3K
Ivr Node. Past Due Payment Prompt
19% (1:5)
22%
59%
517.6K
Tie 1

For customers who try to complete payment within the IVR, the completion rate is 46%

Operational Efficiency & Cost Savings

Decrease Support Call Volume & Spend

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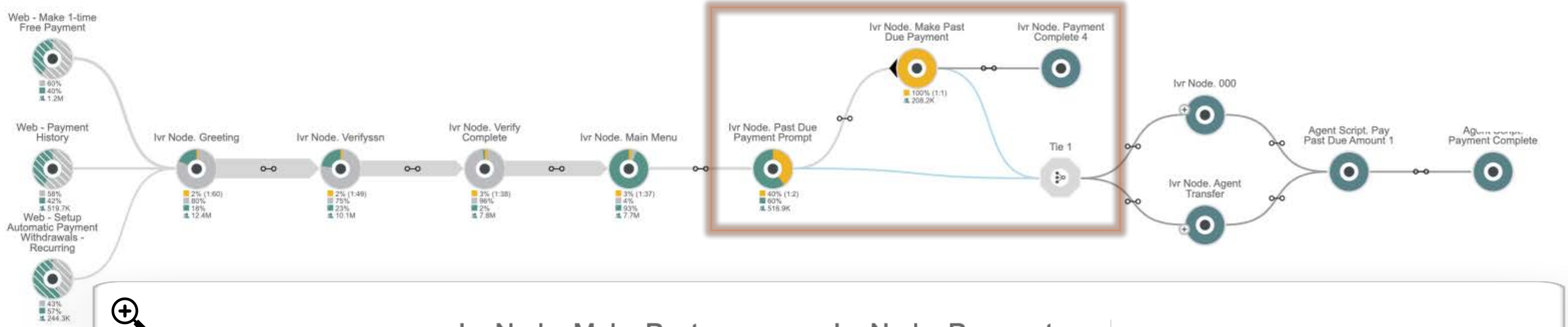
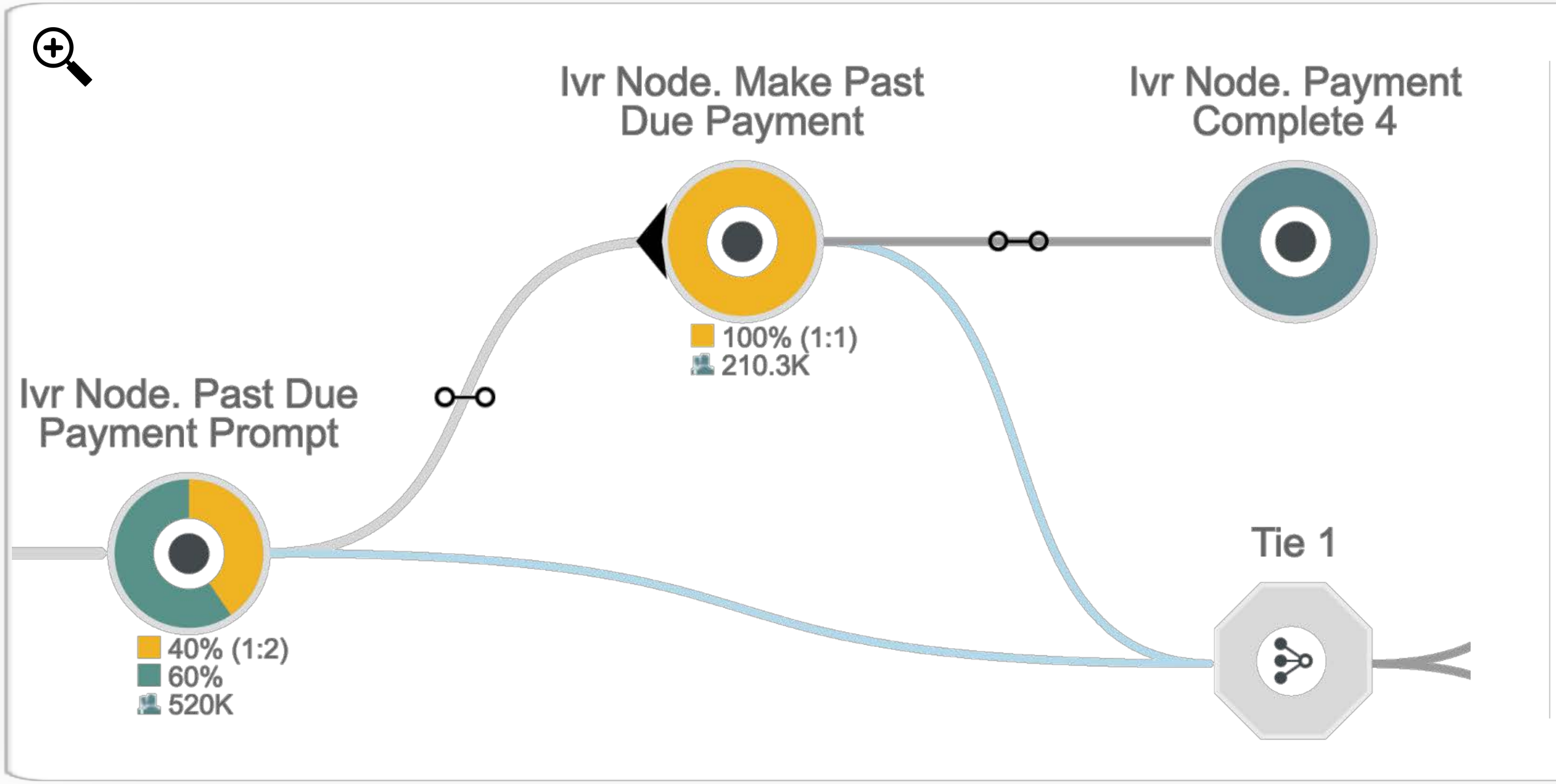

Web - Make 1-time Free Payment
60%
40%
1.2M
Web - Payment History
58%
42%
519.7K
Web - Setup Automatic Payment Withdrawals - Recurring
43%
57%
244.3K
Ivr Node. Greeting
2% (1:60)
80%
18%
12.4M
Ivr Node. Verifyssn
2% (1:49)
75%
23%
10.1M
Ivr Node. Verify Complete
3% (1:38)
96%
2%
7.8M
Ivr Node. Main Menu
3% (1:37)
4%
93%
7.7M
Ivr Node. Past Due Payment Prompt
40% (1:2)
60%
516.9K
Ivr Node. Make Past Due Payment
100% (1:1)
208.2K
Ivr Node. Payment Complete 4
Tie 1
Ivr Node. 000
Ivr Node. Agent Transfer
Agent Script. Pay Past Due Amount 1
Payment Complete


Ivr Node. Make Past Due Payment
Ivr Node. Payment Complete 4
100% (1:1)
210.3K
Ivr Node. Past Due Payment Prompt
40% (1:2)
60%
520K
Tie 1

But, they find that 60% of customers don’t even attempt to make a payment through the IVR.

Operational Efficiency & Cost Savings

Decrease Support Call Volume & Spend

Operational Efficiency & Cost Savings

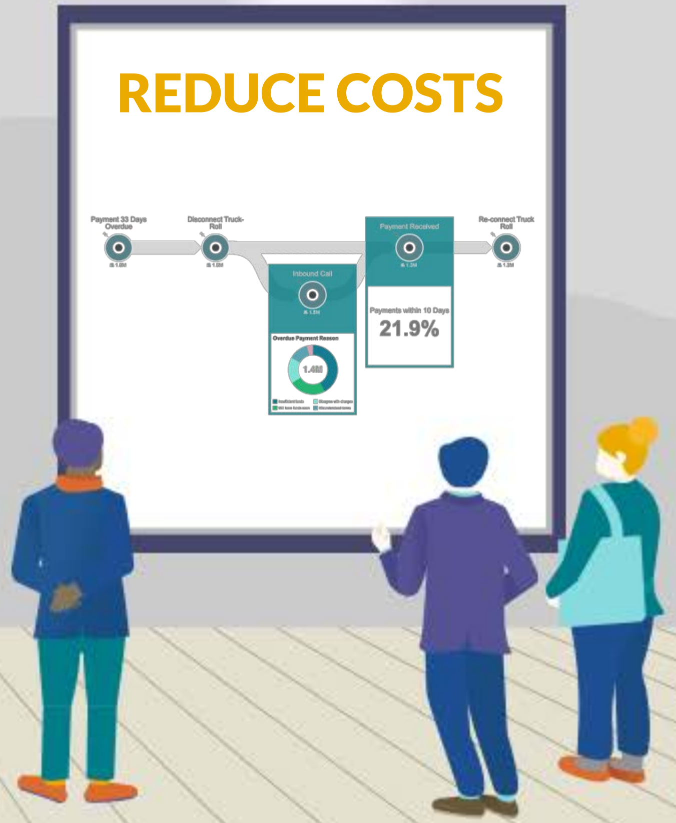
Increase Cost Savings

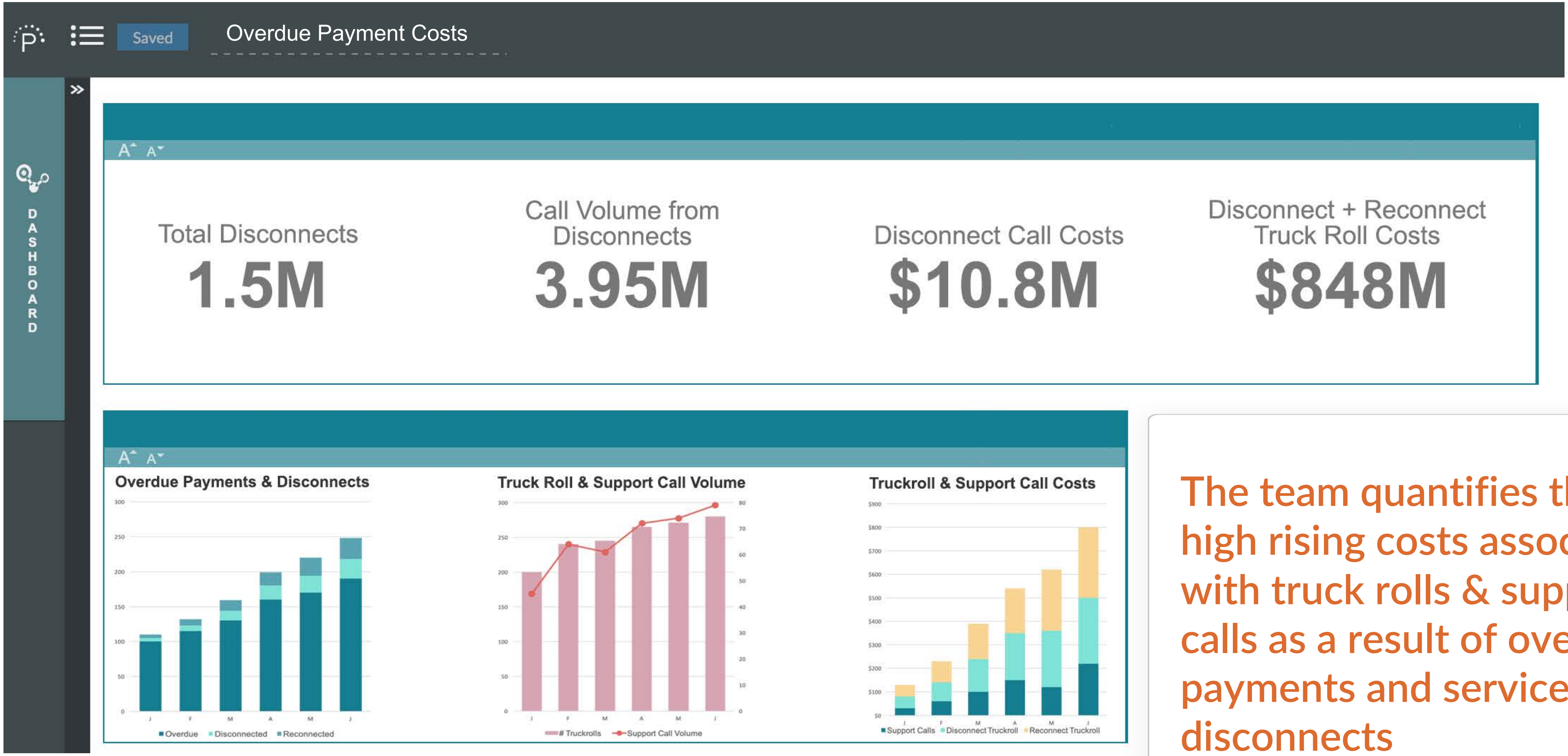
Industry:

Utilities

Summary:

A national utility service provider uses journey analytics to reduce costs related to truck rolls and support calls as a result of overdue payments and service disconnects.


REDUCE COSTS
Payment 33 Days Overdue
Disconnect Truck-Roll
Inbound Call
Payment Received
Re-connect Truck Roll
Overdue Payment Reason
1.4M
Payments within 10 Days
21.9%



Saved
DASHBOARD
A A

Overdue Payment Costs

Total Disconnects
1.5M

Call Volume from Disconnects
3.95M

Disconnect Call Costs
$10.8M

Disconnect + Reconnect Truck Roll Costs
$848M

Overdue Payments & Disconnects
300
250
200
150
100
50
0
J
F
M
A
M
J
Overdue
Disconnected
Reconnected
Truck Roll & Support Call Volume
300
250
200
150
100
50
0
80
70
60
50
40
30
20
10
0
J
F
M
A
M
J
# Truckrolls
Support Call Volume
Truckroll & Support Call Costs
$900
$800
$700
$600
$500
$400
$300
$200
$100
$0
J
F
M
A
M
J
Support Calls
Disconnect Truckroll
Reconnect Truckroll

The team quantifies the high rising costs associated with truck rolls & support calls as a result of overdue payments and service disconnects

Operational Efficiency & Cost Savings

Decrease Support Call Volume & Spend

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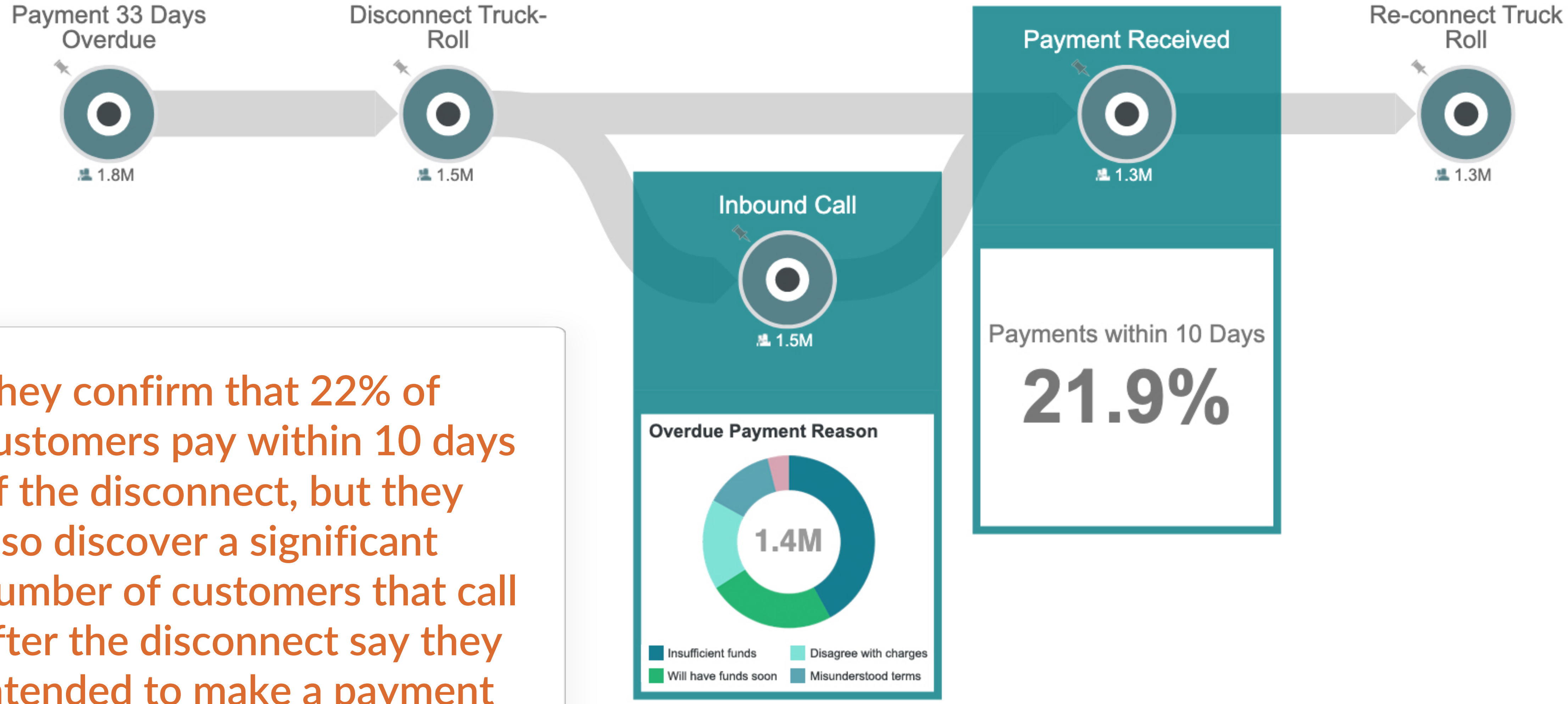
Payment 33 Days Overdue
1.8M
Disconnect Truck-Roll
1.5M
Inbound Call
1.5M
Payment Received
1.3M
Re-connect Truck Roll
1.3M
Overdue Payment Reason
1.4M
🟦 Insufficient funds
🟩 Will have funds soon
🟦 Disagree with charges
🟦 Misunderstood terms
Payments within 10 Days
21.9%

They confirm that 22% of customers pay within 10 days of the disconnect, but they also discover a significant number of customers that call after the disconnect say they intended to make a payment after their next paycheck.

Operational Efficiency & Cost Savings

Decrease Support Call Volume & Spend

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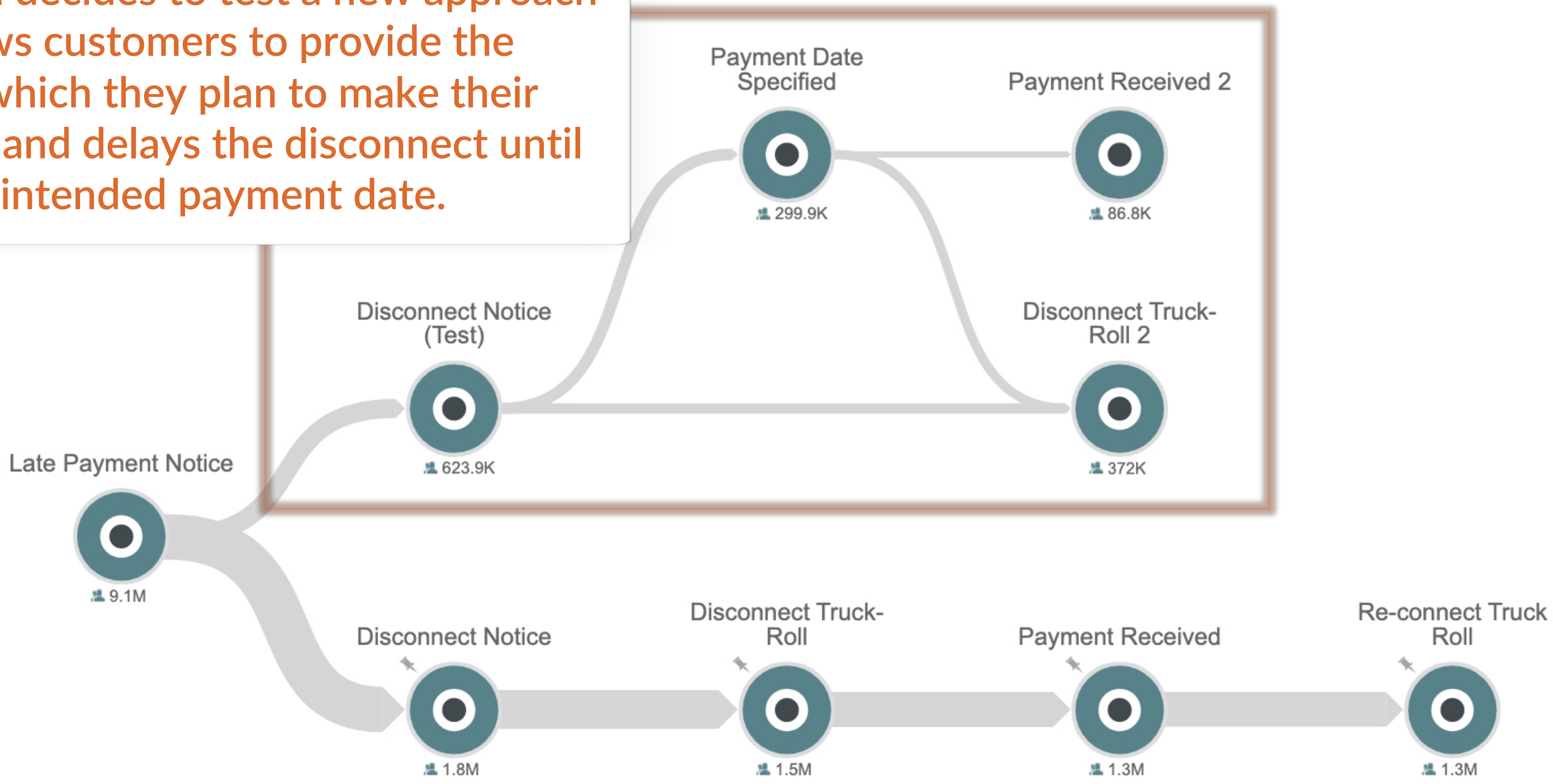
The team decides to test a new approach that allows customers to provide the date on which they plan to make their payment and delays the disconnect until after the intended payment date.


Payment Date Specified
299.9K
Payment Received 2
86.8K
Disconnect Notice (Test)
623.9K
Disconnect Truck-Roll 2
372K
Late Payment Notice
9.1M
Disconnect Notice
1.8M
Disconnect Truck-Roll
1.5M
Payment Received
1.3M
Re-connect Truck Roll
1.3M

Operational Efficiency & Cost Savings

Decrease Support Call Volume & Spend

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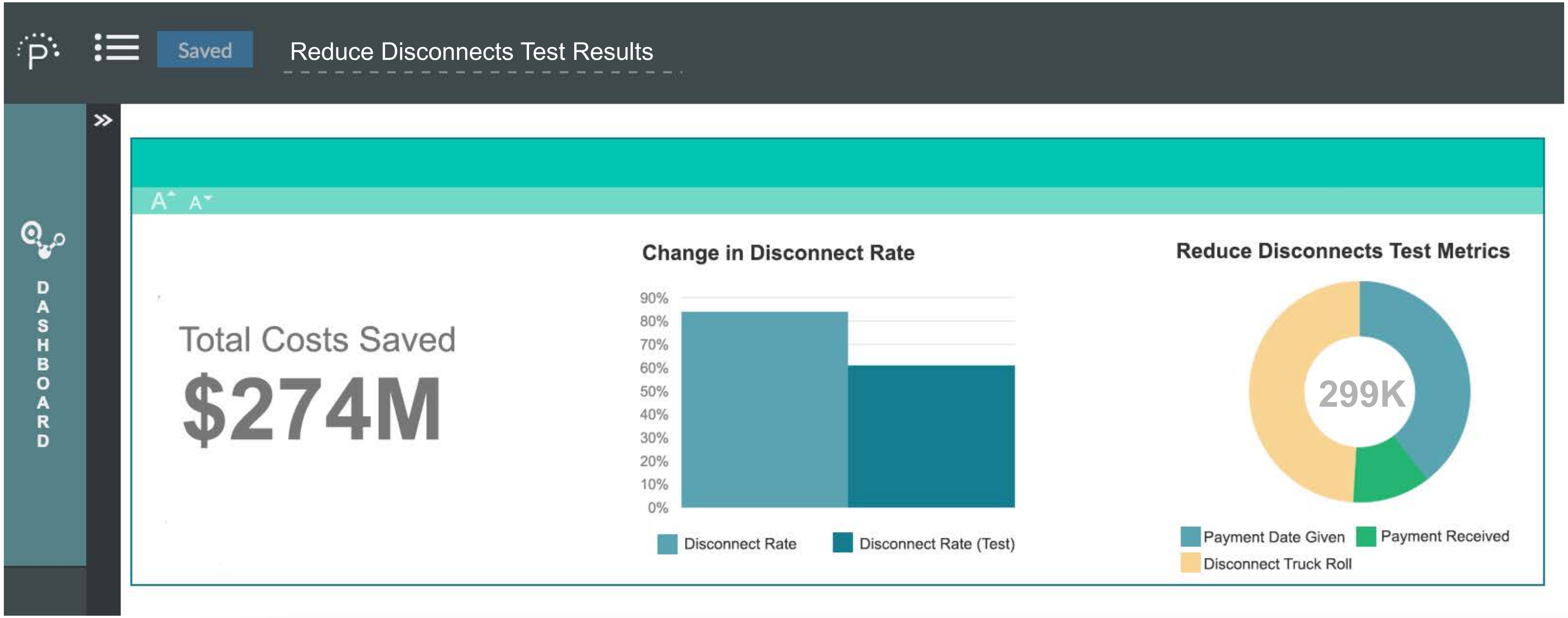

Saved

Reduce Disconnects Test Results

DASHBOARD

Total Costs Saved

$274M

Change in Disconnect Rate
90%
80%
70%
60%
50%
40%
30%
20%
10%
0%
Disconnect Rate
Disconnect Rate (Test)
Reduce Disconnects Test Metrics
299K
Payment Date Given
Payment Received
Disconnect Truck Roll

By delaying the disconnect visit until after the customer's intended payment date, the team finds that the rate of disconnects drops more than 20%. They calculate that this would save more than $274M in unnecessary truck rolls if the approach was rolled out to their entire customer base.

Operational Efficiency & Cost Savings

Decrease Support Call Volume & Spend

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CX Measurement & Improvement

12%
32%
75%
32%
75%
12%
12%
32%
75%
DETRACTORS
PASSIVES
PROMOTERS
7
37
97
97
37
7

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CX Measurement & Improvement

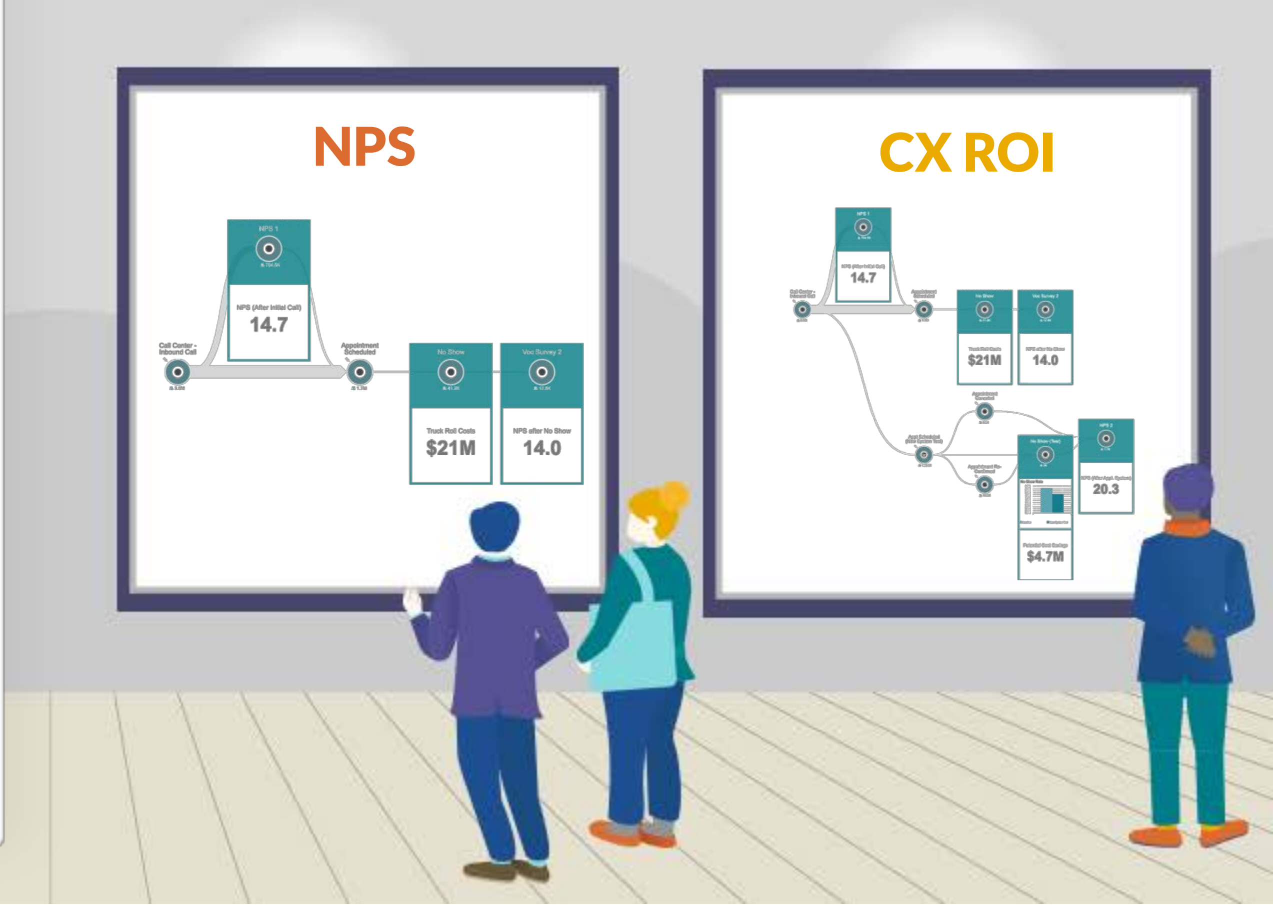
Measure the Impact of CX Initiatives

Industry:

Telecommunications

Summary:

One of the largest telecom providers in the US uses Pointillist to gauge the success of a new self-service appointment system intended to improve customer experience while reducing cost to serve.


NPS
NPS 1
NPS (After Initial Call)
14.7
Call Center - Inbound Call
Appointment Scheduled
No Show
Voc Survey 2
Truck Roll Costs
$21M
NPS after No Show
14.0
CX ROI
14.7
$21M
14.0
20.3
$4.7M

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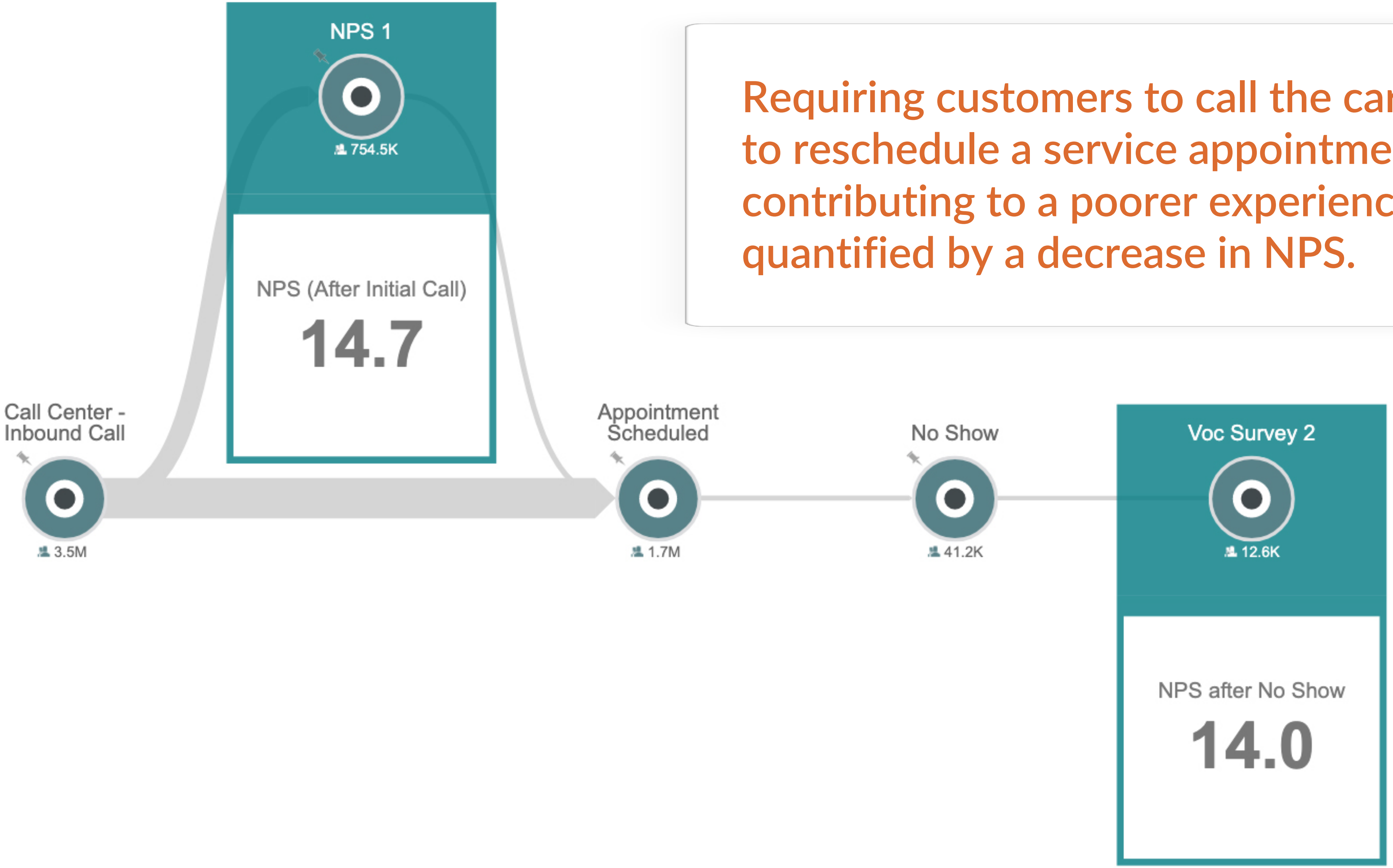
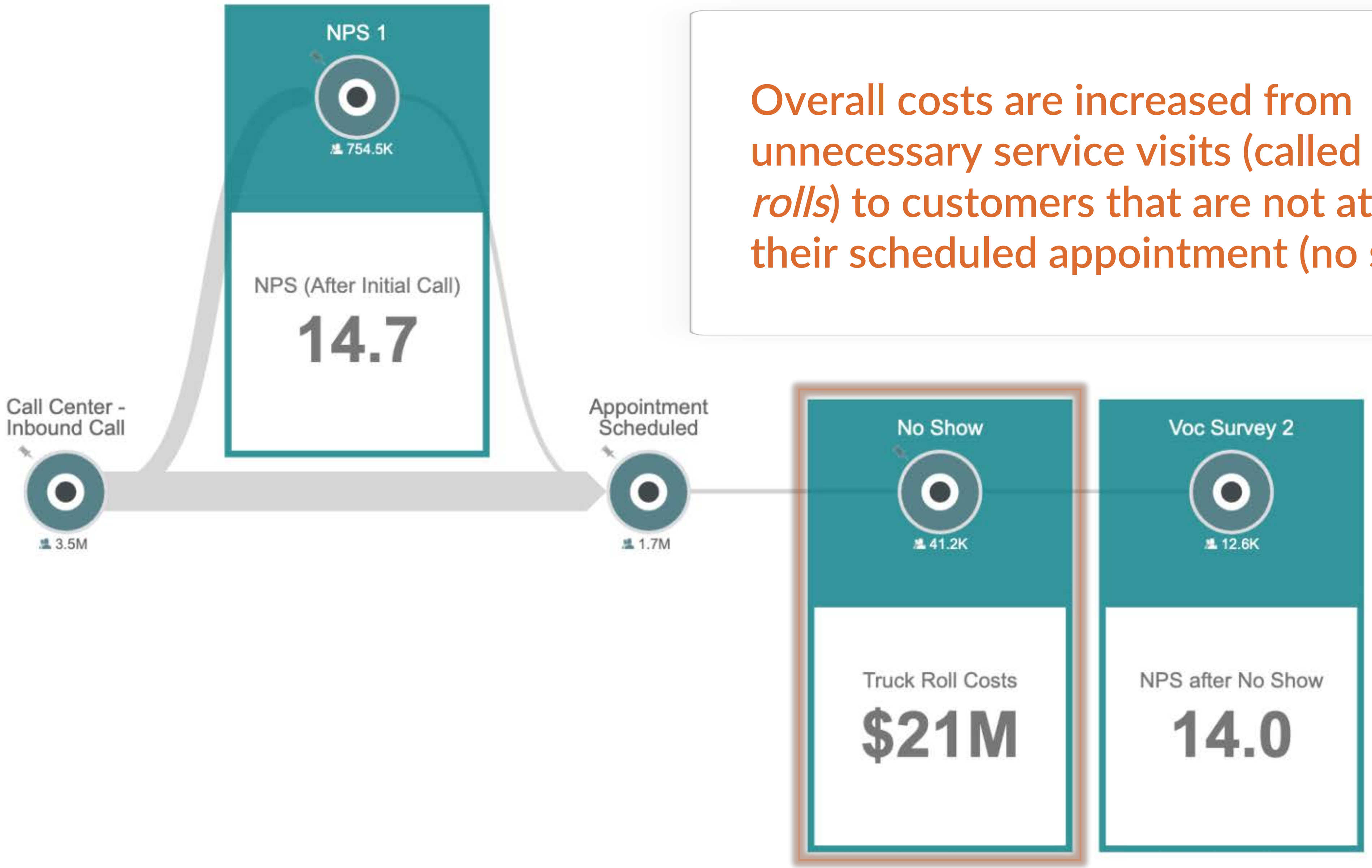

NPS 1
754.5K
NPS (After Initial Call)
14.7
Call Center - Inbound Call
3.5M
Appointment Scheduled
1.7M
No Show
41.2K
Voc Survey 2
12.6K
NPS after No Show
14.0

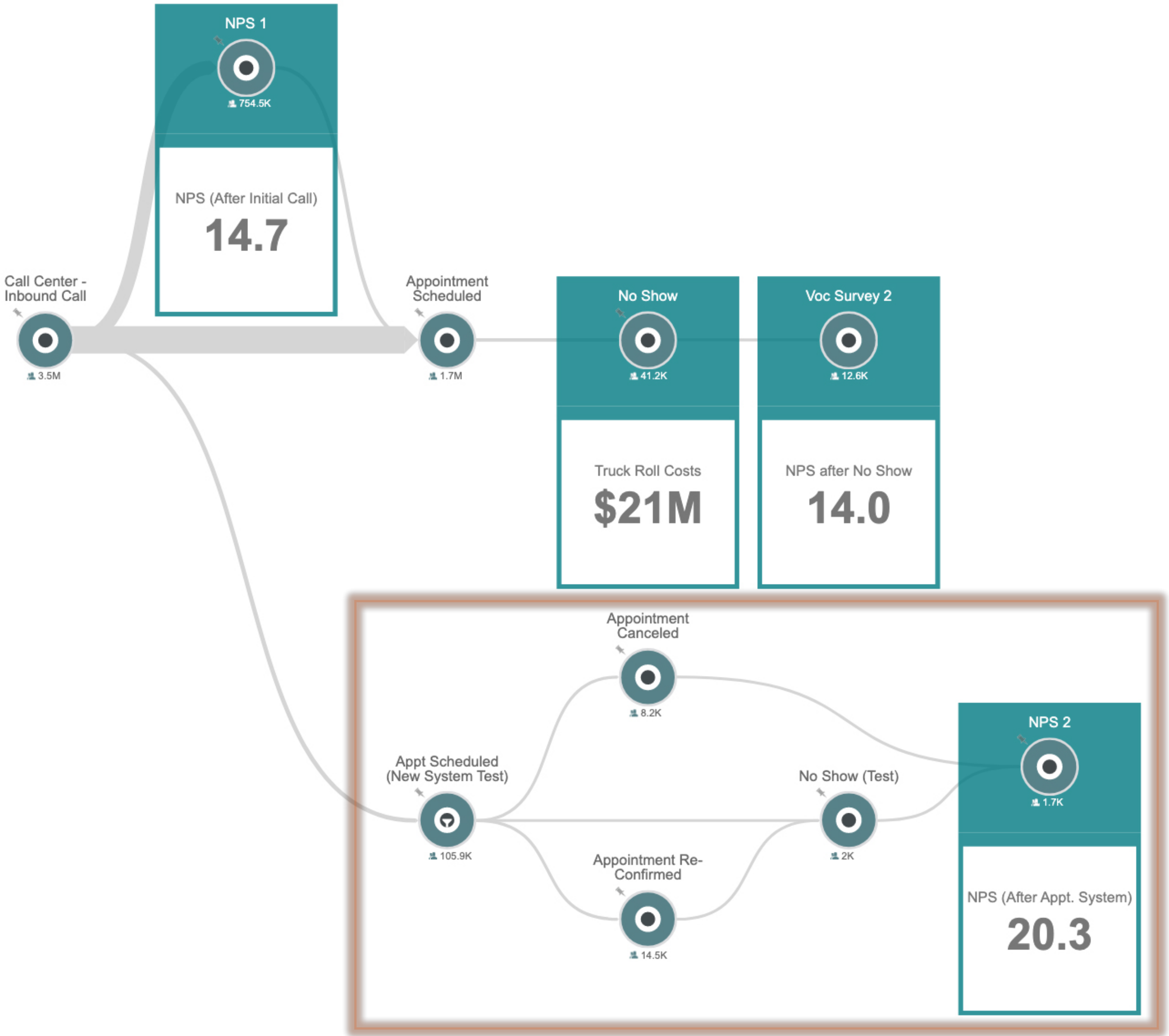
Requiring customers to call the care center to reschedule a service appointment is contributing to a poorer experience, as quantified by a decrease in NPS.

CX Measurement & Improvement

Measure the Impact of CX Initiatives


NPS 1
754.5K
NPS (After Initial Call)
14.7
Call Center - Inbound Call
3.5M
Appointment Scheduled
1.7M
No Show
41.2K
Truck Roll Costs
$21M
Voc Survey 2
12.6K
NPS after No Show
14.0

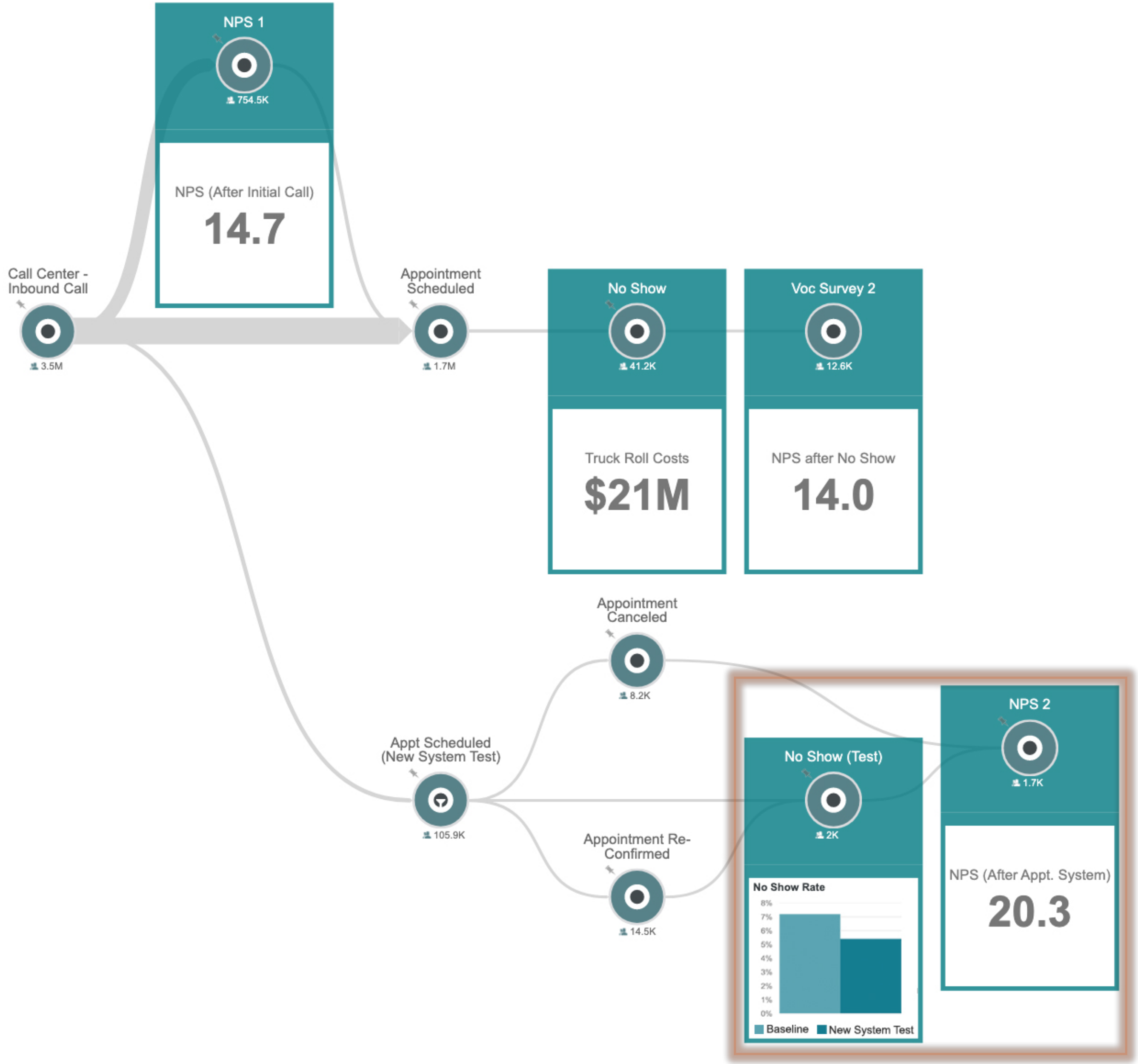
Overall costs are increased from unnecessary service visits (called *truck rolls*) to customers that are not at home for their scheduled appointment (no shows).

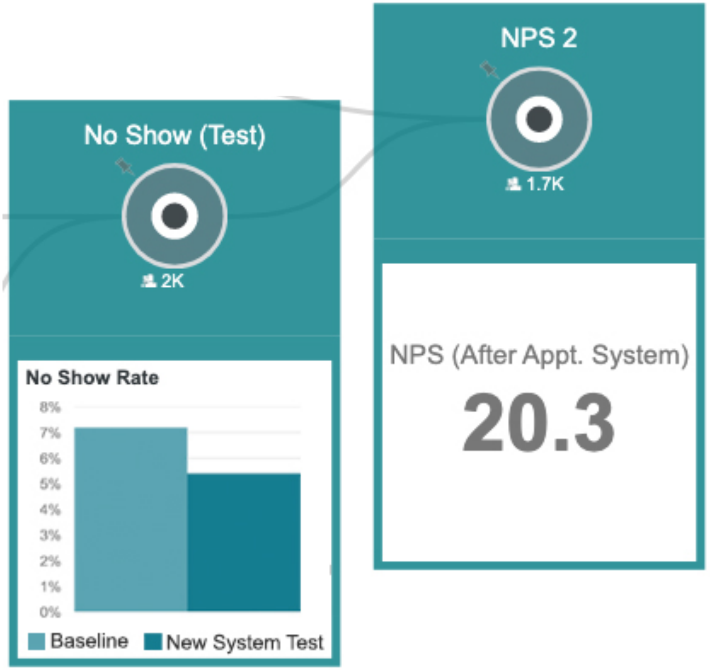

NPS 1
754.5K
NPS (After Initial Call)
14.7
Call Center - Inbound Call
3.5M
Appointment Scheduled
1.7M
No Show
41.2K
Truck Roll Costs
$21M
Voc Survey 2
12.6K
NPS after No Show
14.0
Appointment Canceled
8.2K
Appt Scheduled (New System Test)
105.9K
No Show (Test)
2K
Appointment Re-Confirmed
14.5K
NPS 2
1.7K
NPS (After Appt. System)
20.3

To address this issue, the team tests a new self-service appointment scheduling system on a subset of customers. The team finds a positive impact on those customers using the new system, whose NPS is nearly 6 points higher than customers using the existing approach.

CX Measurement & Improvement

Measure the Impact of CX Initiatives


NPS 1
754.5K
NPS (After Initial Call)
14.7
Call Center - Inbound Call
3.5M
Appointment Scheduled
1.7M
No Show
41.2K
Truck Roll Costs
$21M
Voc Survey 2
12.6K
NPS after No Show
14.0
Appointment Canceled
8.2K
Appt Scheduled (New System Test)
105.9K
Appointment Re-Confirmed
14.5K
No Show (Test)
2K
No Show Rate
8%
7%
6%
5%
4%
3%
2%
1%
0%
Baseline
New System Test
NPS 2
1.7K
NPS (After Appt. System)
20.3


No Show (Test)
2K
No Show Rate
8%
7%
6%
5%
4%
3%
2%
1%
0%
Baseline
New System Test
NPS 2
1.7K
NPS (After Appt. System)
20.3

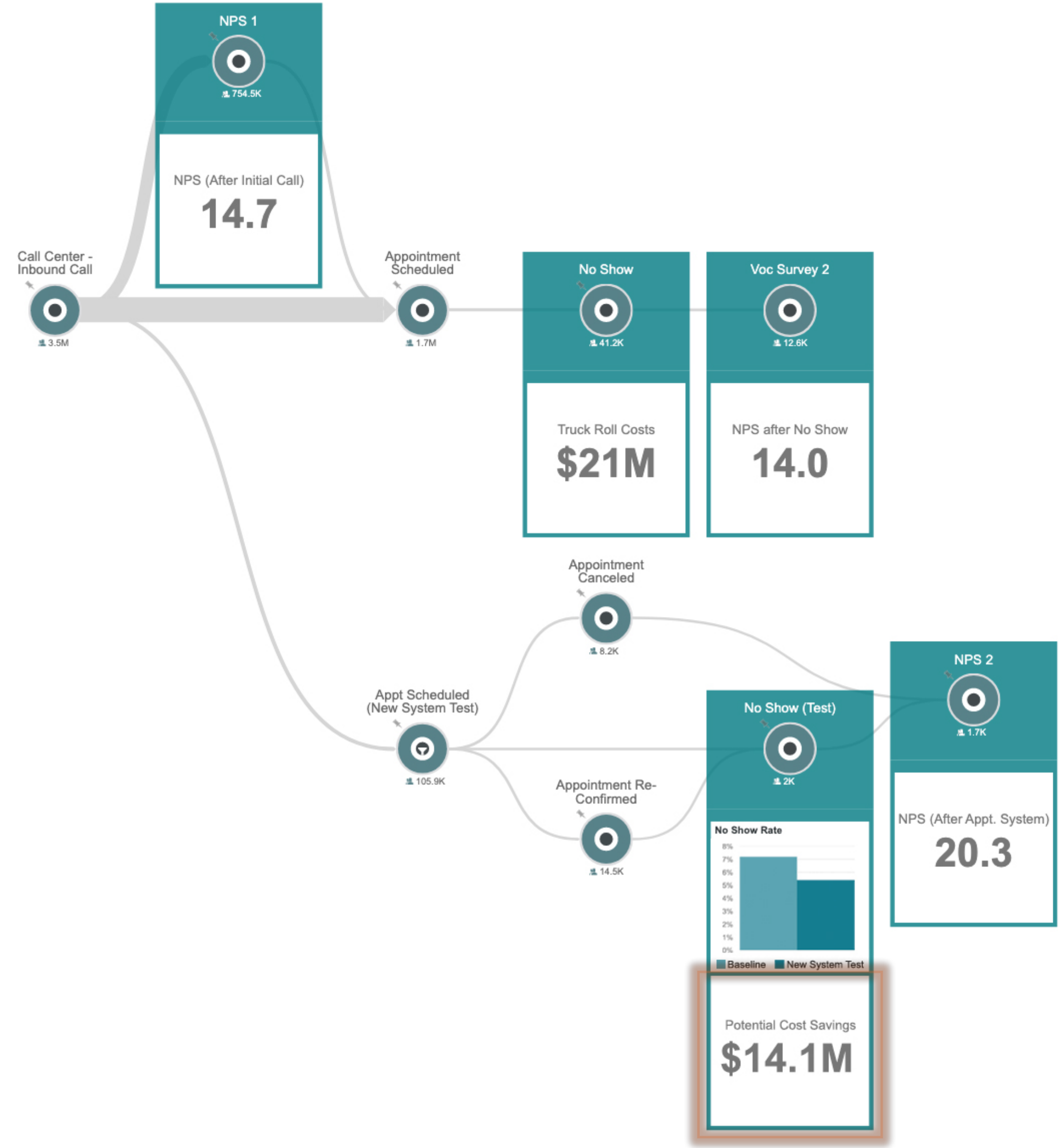
In addition to an increase in NPS, the no show rate for customers using the new system drops from 7.2% to 5.4%.

CX Measurement & Improvement

Measure the Impact of CX Initiatives

CX Measurement & Improvement

Measure the Impact of CX Initiatives


NPS 1
754.5K
NPS (After Initial Call)
14.7
Call Center - Inbound Call
3.5M
Appointment Scheduled
1.7M
No Show
41.2K
Truck Roll Costs
$21M
Voc Survey 2
12.6K
NPS after No Show
14.0
Appointment Canceled
8.2K
NPS 2
1.7K
NPS (After Appt. System)
20.3
Appt Scheduled (New System Test)
105.9K
No Show (Test)
2K
Appointment Re-Confirmed
14.5K
No Show Rate
8%
7%
6%
5%
4%
3%
2%
1%
0%
Baseline
New System Test
Potential Cost Savings
$14.1M

Potential Cost Savings
$14.1M

The team estimates that rolling out the new automated system to all customers could save $14.1M due to the decrease in the No Show rate.

CX Measurement & Improvement

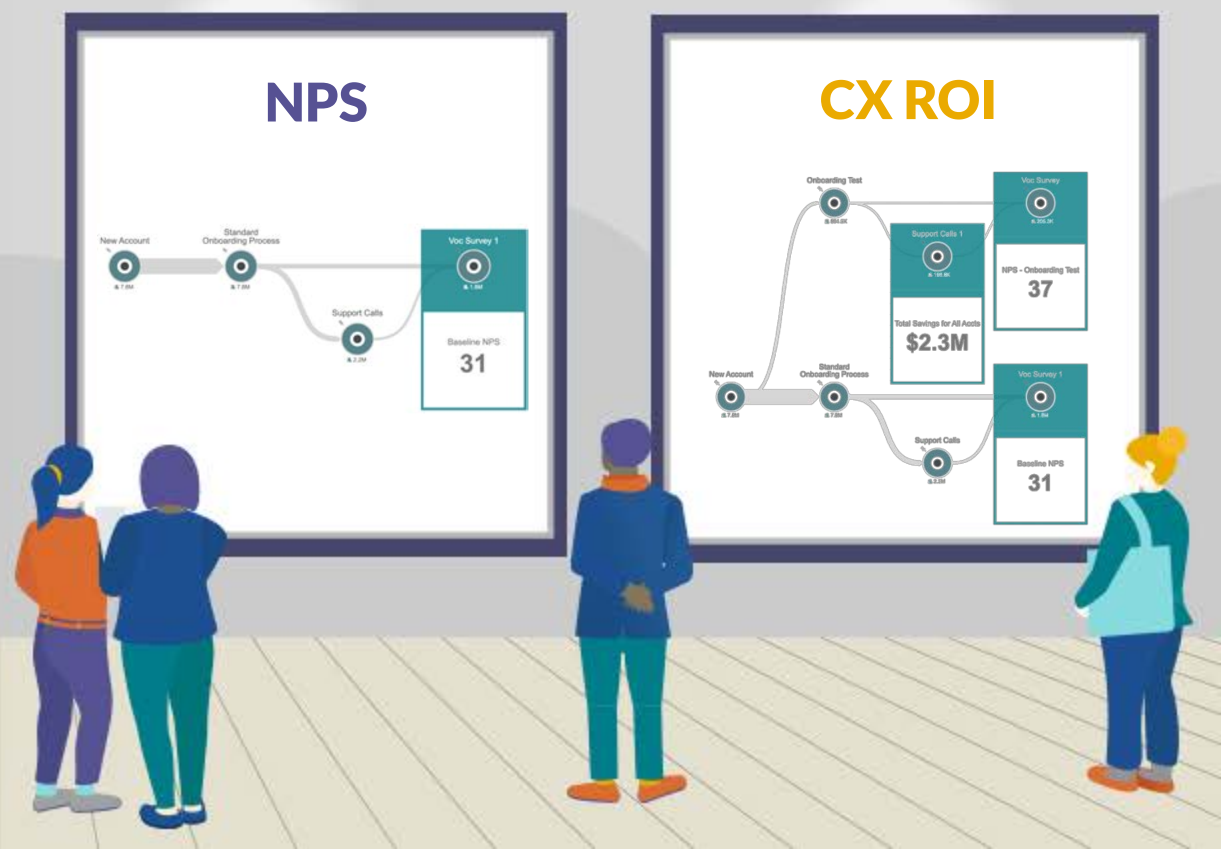
Make NPS Actionable & Quantify the ROI of CX Initiatives

Industry:

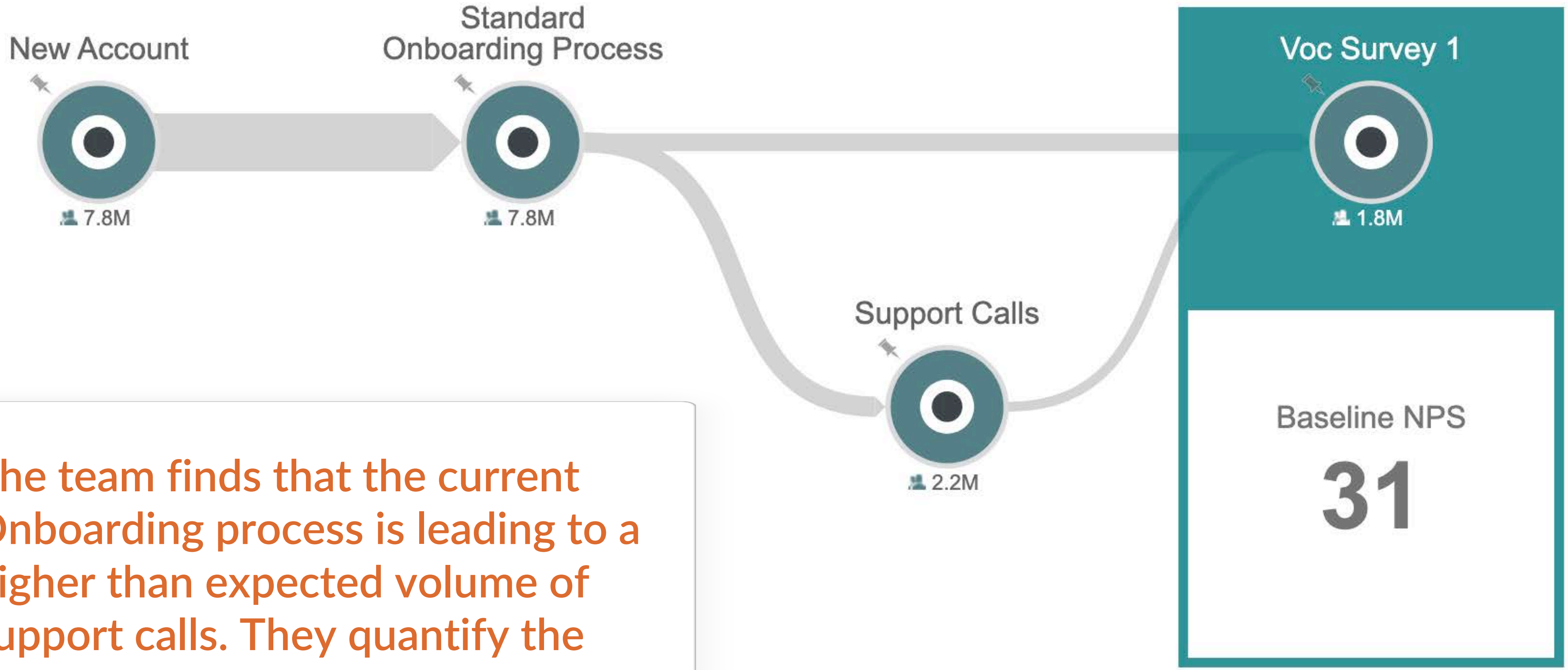
Financial Services

Summary:

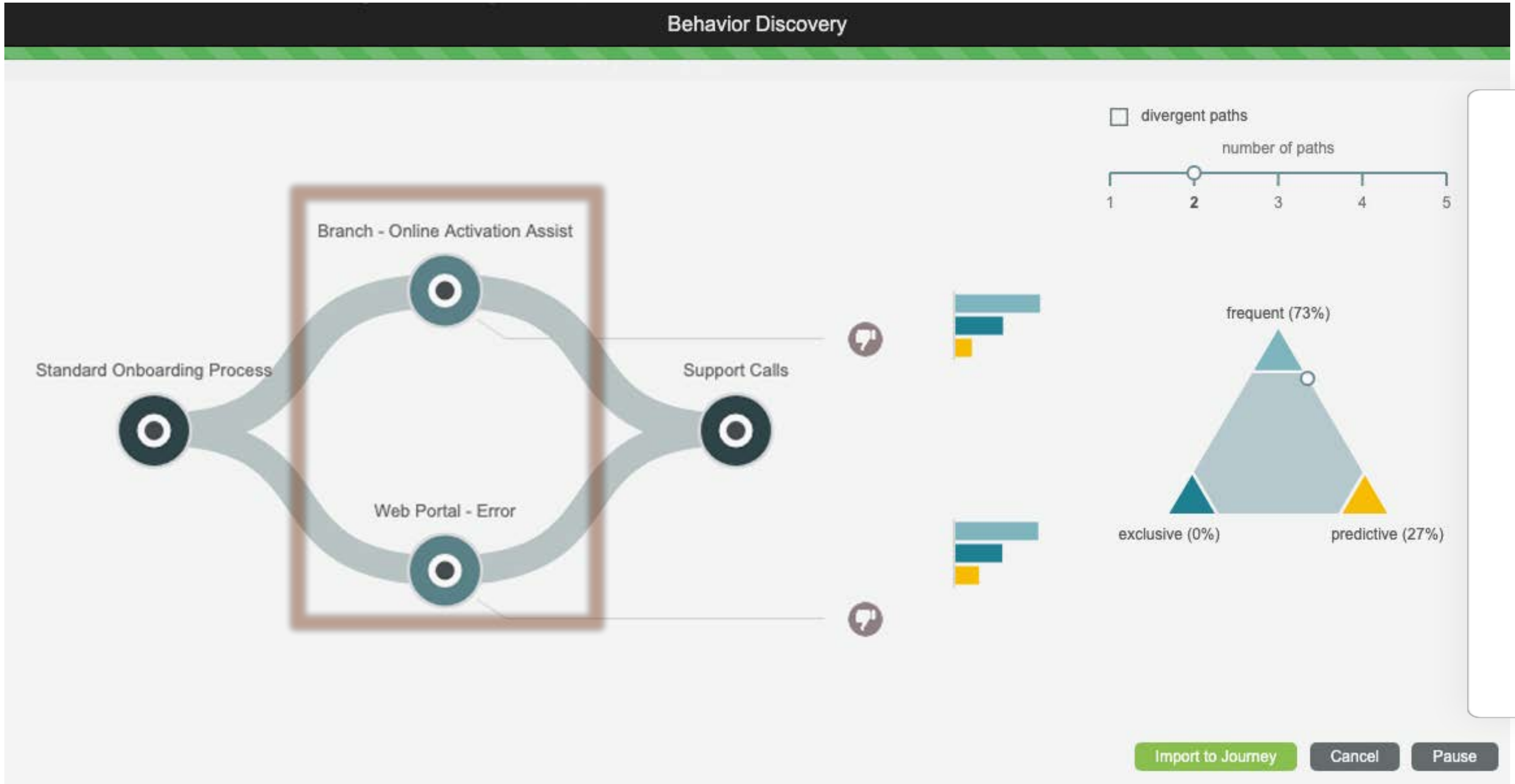
A CX team at a leading bank uses Pointillist to identify CX issues in their customer onboarding process, launch a test initiative to improve the process, and determine it's impact and ROI.


NPS
New Account
7.8M
Standard Onboarding Process
7.8M
Support Calls
2.2M
Voc Survey 1
1.8M
Baseline NPS
31
CX ROI
Onboarding Test
Voc Survey
Support Calls 1
NPS - Onboarding Test
37
Total Savings for All Accts
$2.3M
New Account
7.8M
Standard Onboarding Process
7.8M
Support Calls
2.2M
Voc Survey 1
1.8M
Baseline NPS
31

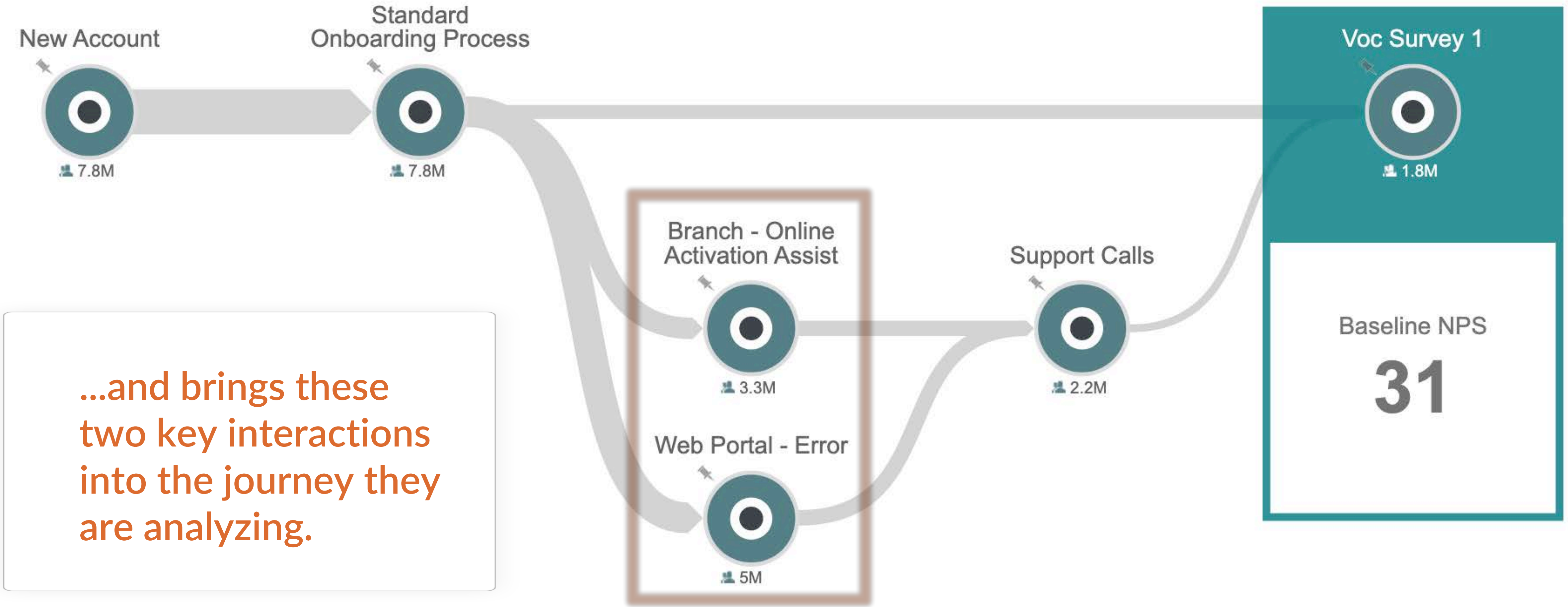
@PointillistView


New Account
7.8M
Standard Onboarding Process
7.8M
Support Calls
2.2M
Voc Survey 1
1.8M
Baseline NPS
31

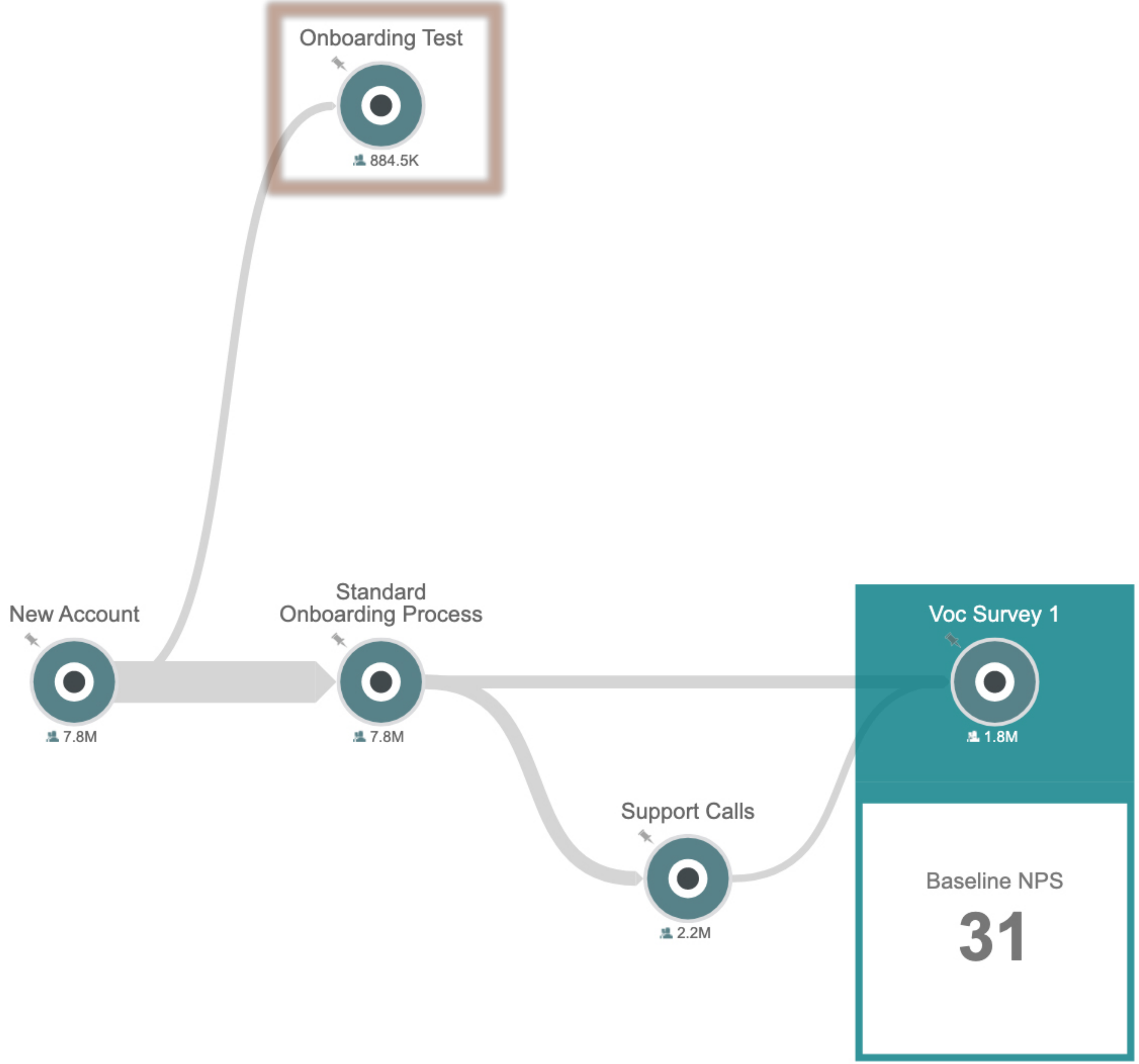
The team finds that the current Onboarding process is leading to a higher than expected volume of support calls. They quantify the Onboarding experience using NPS.


Behavior Discovery
☐ divergent paths
number of paths
1
2
3
4
5
Branch - Online Activation Assist
Standard Onboarding Process
Support Calls
Web Portal - Error
frequent (73%)
exclusive (0%)
predictive (27%)
Import to Journey
Cancel
Pause

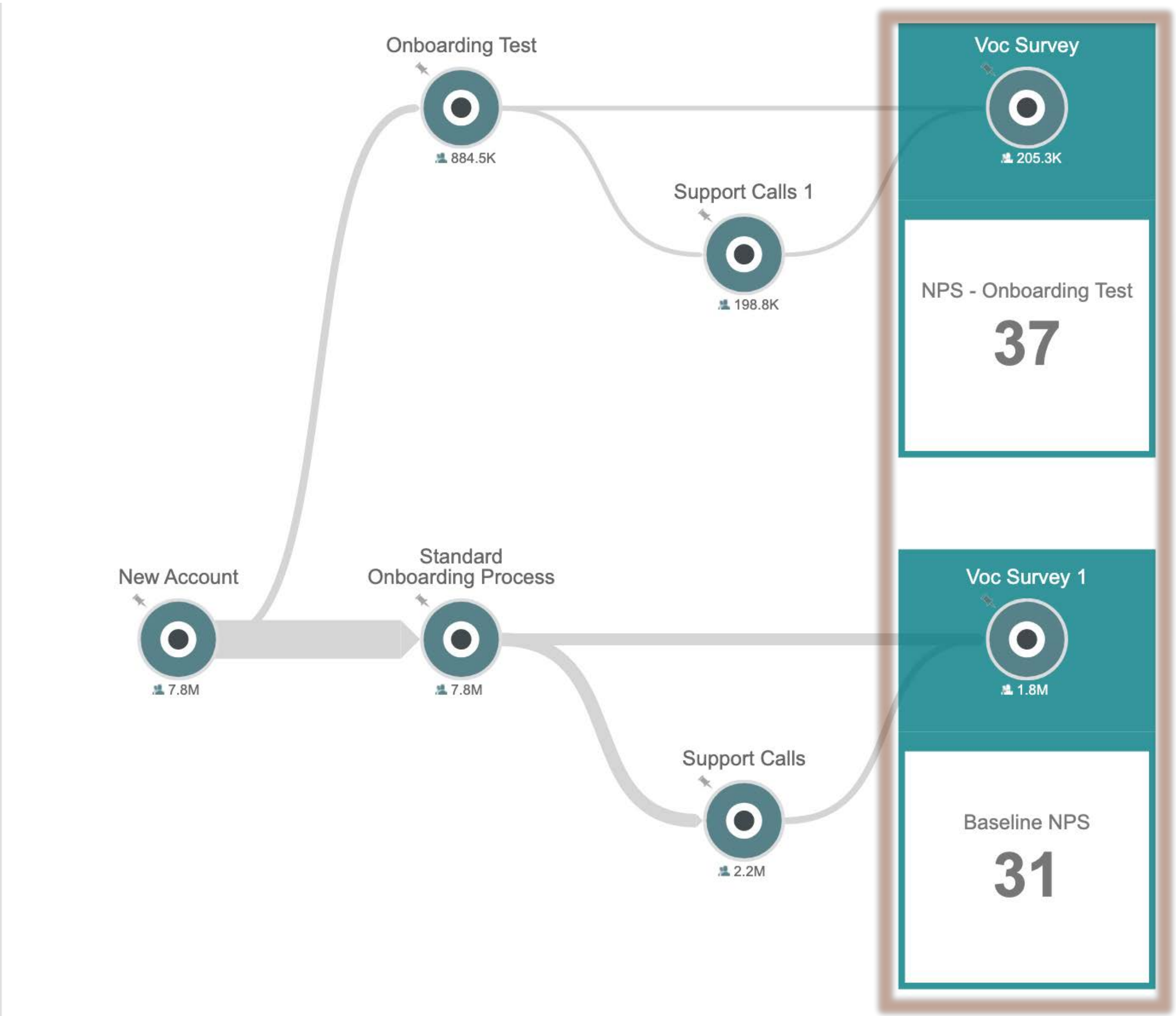
Using machine learning, the team discovers that the majority of support calls are coming from customers that asked for assistance at a branch location or had received an error while using the web portal...


New Account
7.8M
Standard Onboarding Process
7.8M
Branch - Online Activation Assist
3.3M
Web Portal - Error
5M
Support Calls
2.2M
Voc Survey 1
1.8M
Baseline NPS
31

...and brings these two key interactions into the journey they are analyzing.


Onboarding Test
884.5K
New Account
7.8M
Standard Onboarding Process
7.8M
Voc Survey 1
1.8M
Support Calls
2.2M
Baseline NPS
31

The team launches a new project to improve the onboarding process by addressing these two issues. After the new onboarding process is tested, the team analyzes its impact.


Onboarding Test
884.5K
Support Calls 1
198.8K
Voc Survey
205.3K
New Account
7.8M
Standard Onboarding Process
7.8M
Support Calls
2.2M
Voc Survey 1
1.8M

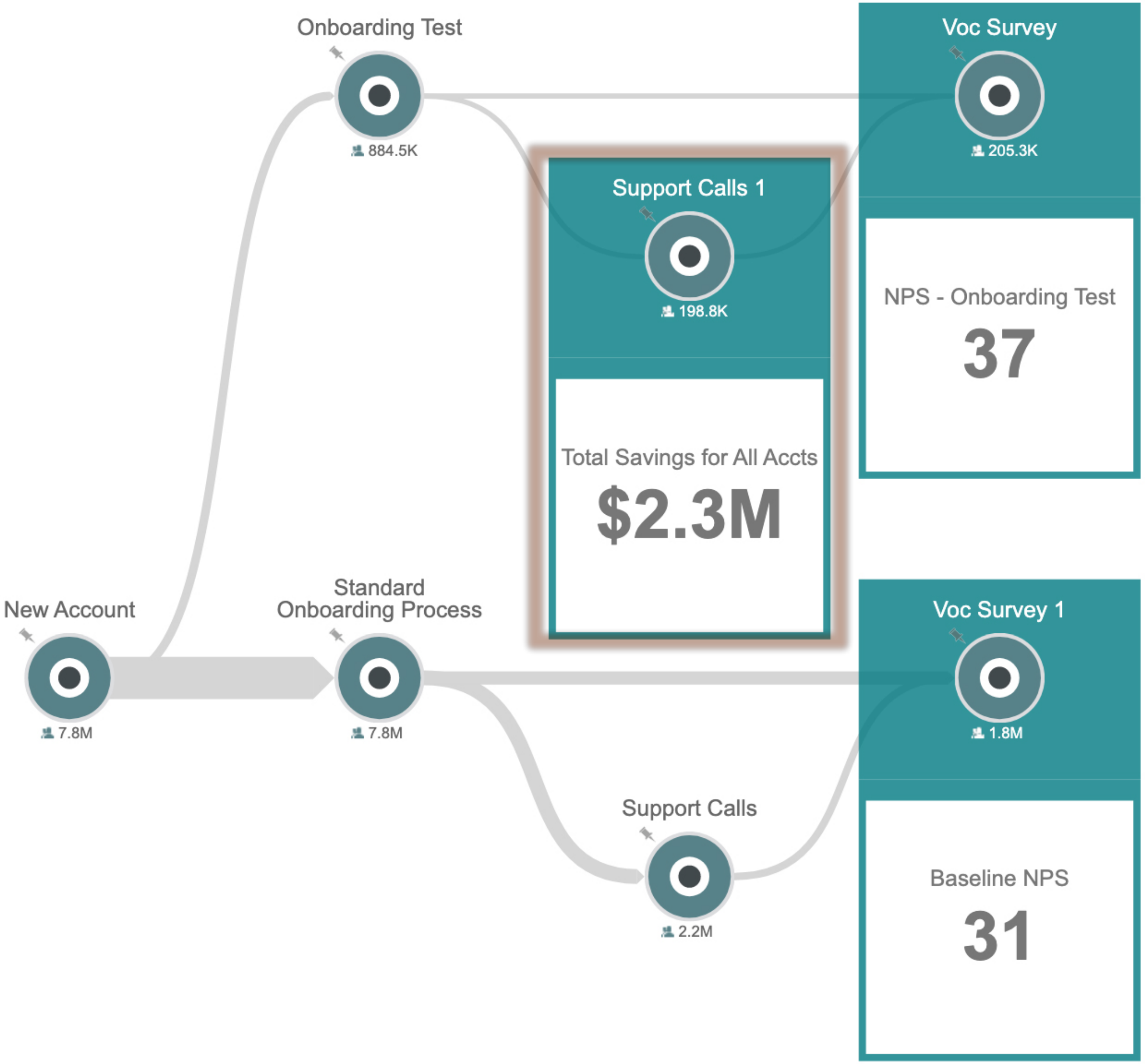
NPS - Onboarding Test

37

Baseline NPS

31

They quickly find that the new onboarding process test results in a 6-point increase in NPS...


Onboarding Test
884.5K
Voc Survey
205.3K
Support Calls 1
198.8K
New Account
7.8M
Standard Onboarding Process
7.8M
Voc Survey 1
1.8M
Support Calls
2.2M

Total Savings for All Accts

$2.3M

NPS - Onboarding Test

37

Baseline NPS

31

...and leads to a reduction in the rate of support calls that could yield a $2.3M savings in support call costs if applied to all new customers.

CX Measurement & Improvement

Make NPS Actionable & Quantify the ROI of CX Initiatives

Pointillist

Revenue Growth

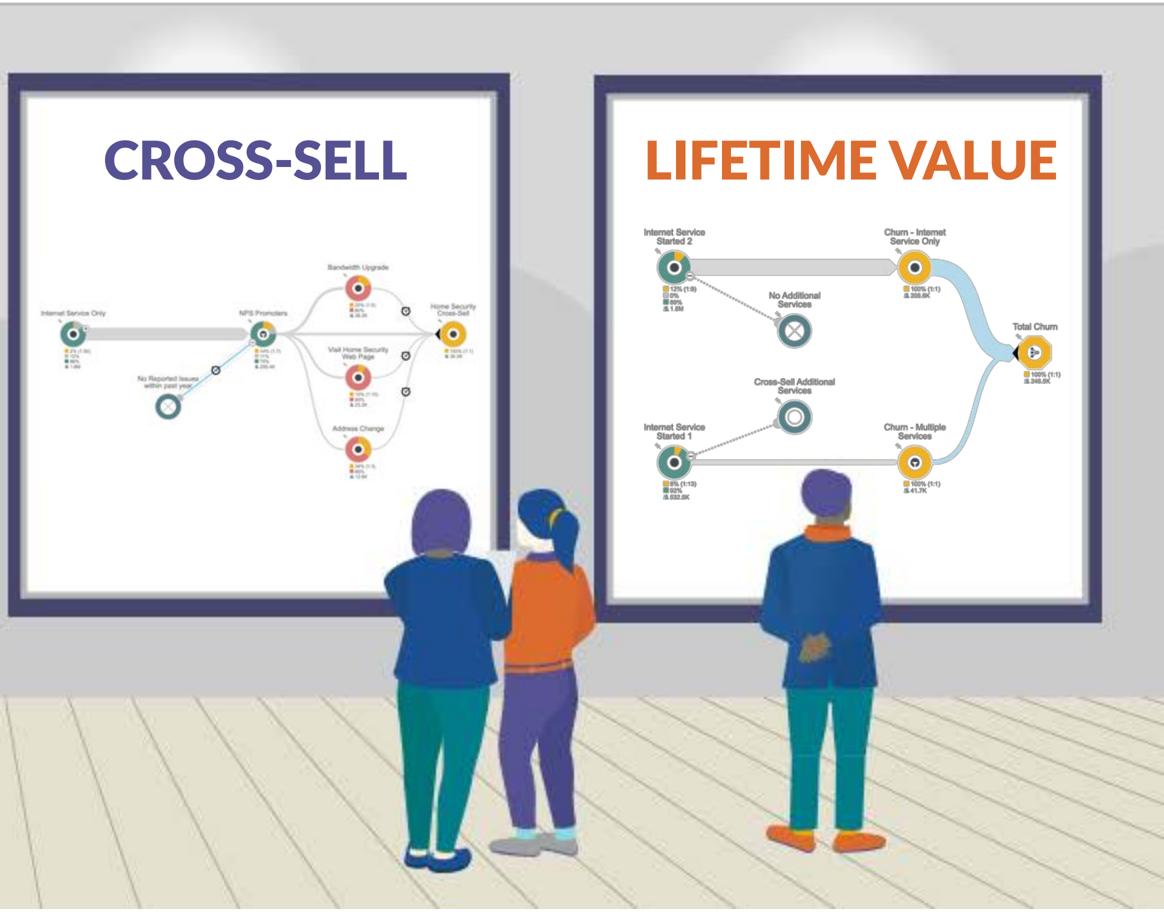
Pointillist

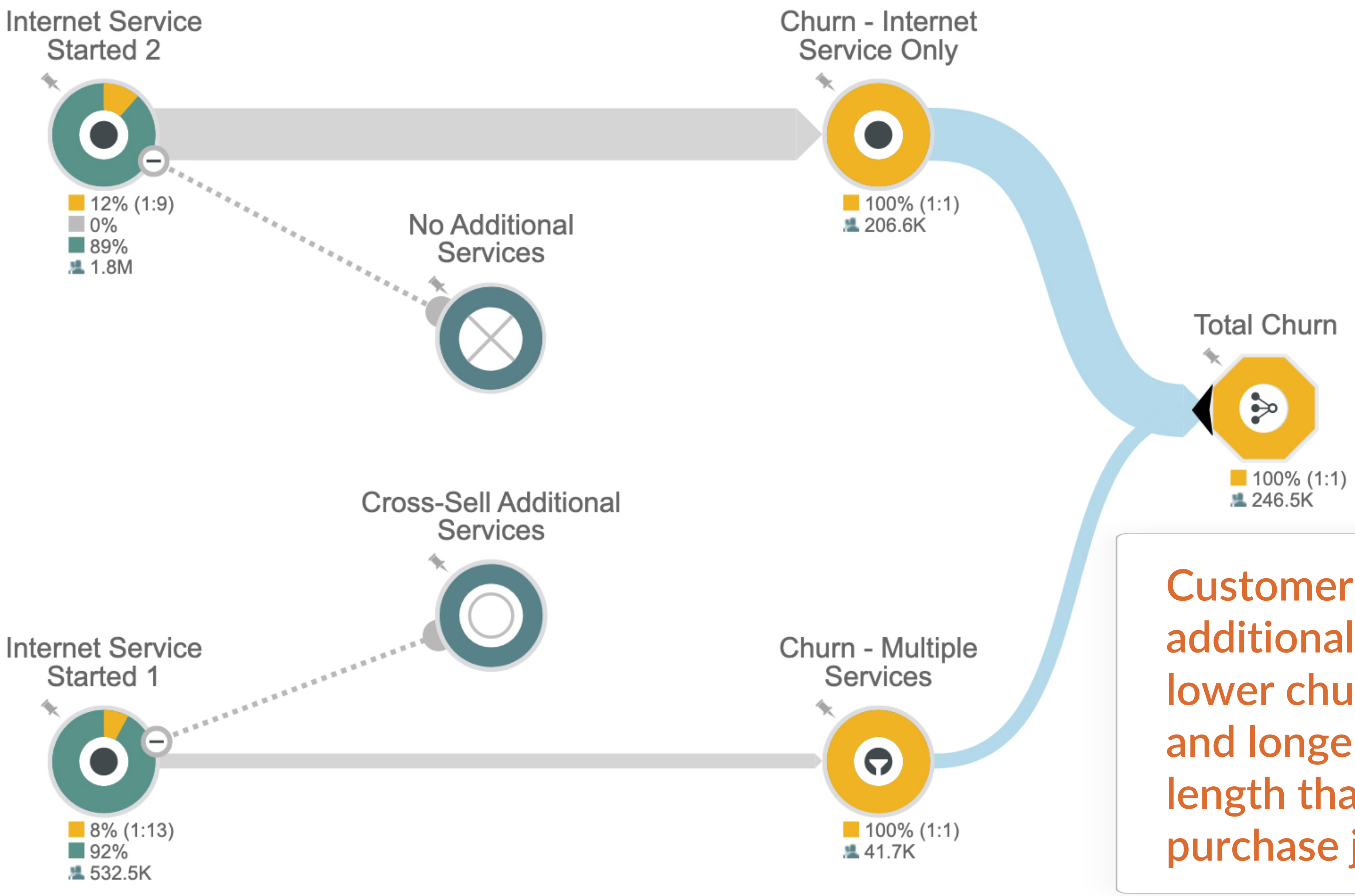
Revenue Growth

Increase Cross-Sell Rates

Industry:
Telecommunications

Summary:
A global telecom provider uses Pointillist to increase cross-sell of mobile, home phone and home security products to internet customers.

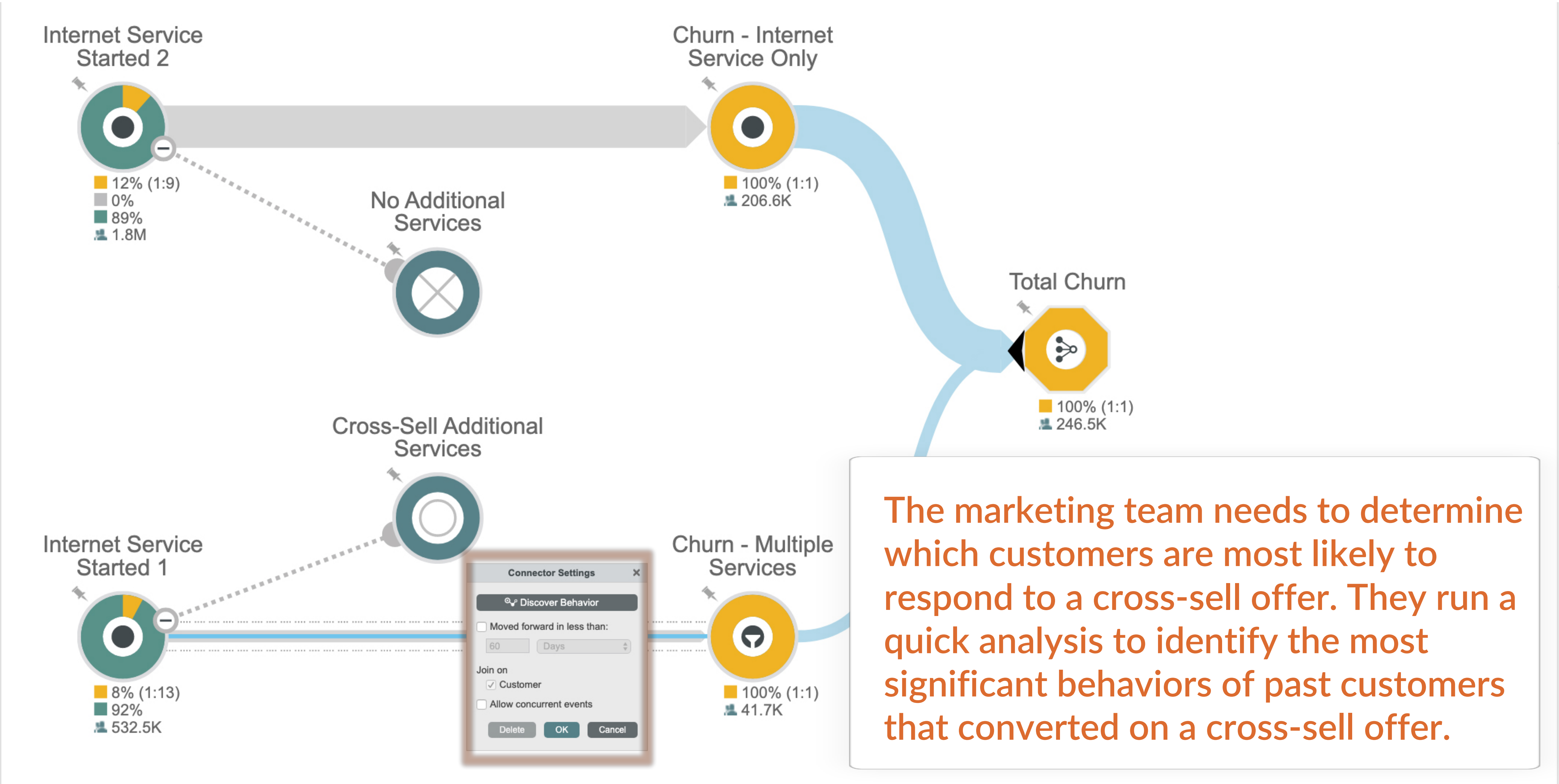

CROSS-SELL
Internet Service Only
No Reported Issues within past year
NPS Promoters
Bandwidth Upgrade
Visit Home Security Web Page
Address Change
Home Security Cross-Sell
LIFETIME VALUE
Internet Service Started 2
No Additional Services
Churn - Internet Service Only
Total Churn
Cross-Sell Additional Services
Internet Service Started 1
Churn - Multiple Services


Internet Service Started 2
12% (1:9)
0%
89%
1.8M
Churn - Internet Service Only
100% (1:1)
206.6K
No Additional Services
Total Churn
100% (1:1)
246.5K
Cross-Sell Additional Services
Internet Service Started 1
8% (1:13)
92%
532.5K
Churn - Multiple Services
100% (1:1)
41.7K

Customers that are cross-sold additional services have a much lower churn rate, higher CLTV, and longer average subscription length than customers who purchase just one service.

Revenue Growth

Increase Cross-Sell Rates


Internet Service Started 2
12% (1:9)
0%
89%
1.8M
Churn - Internet Service Only
100% (1:1)
206.6K
No Additional Services
Total Churn
100% (1:1)
246.5K
Cross-Sell Additional Services
Internet Service Started 1
8% (1:13)
92%
532.5K
Churn - Multiple Services
100% (1:1)
41.7K

Connector Settings ×

Discover Behavior

☐ Moved forward in less than: 60 Days

Join on

☑ Customer

☐ Allow concurrent events

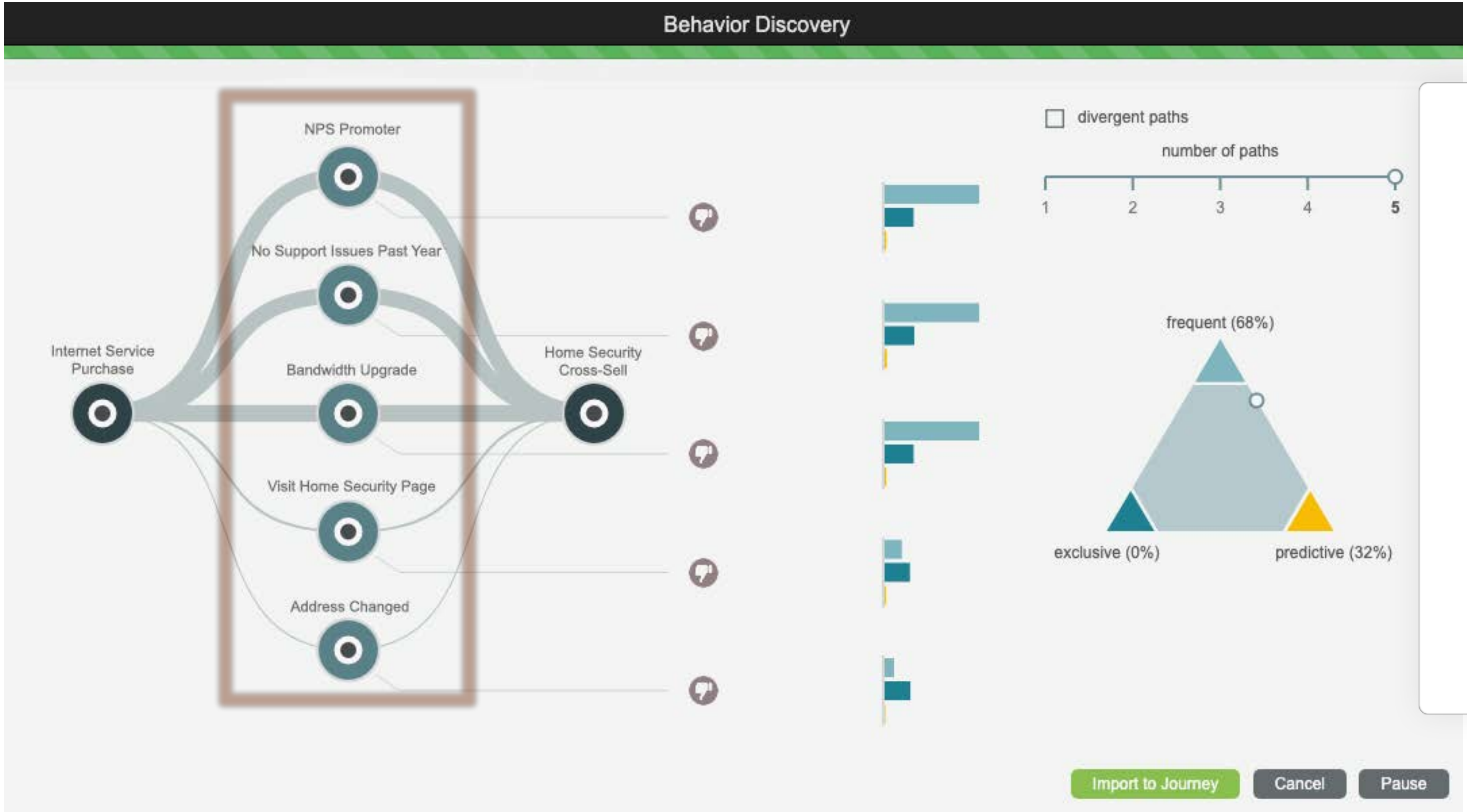
Delete | OK | Cancel

The marketing team needs to determine which customers are most likely to respond to a cross-sell offer. They run a quick analysis to identify the most significant behaviors of past customers that converted on a cross-sell offer.

Revenue Growth

Increase Cross-Sell Rates

Pointillist

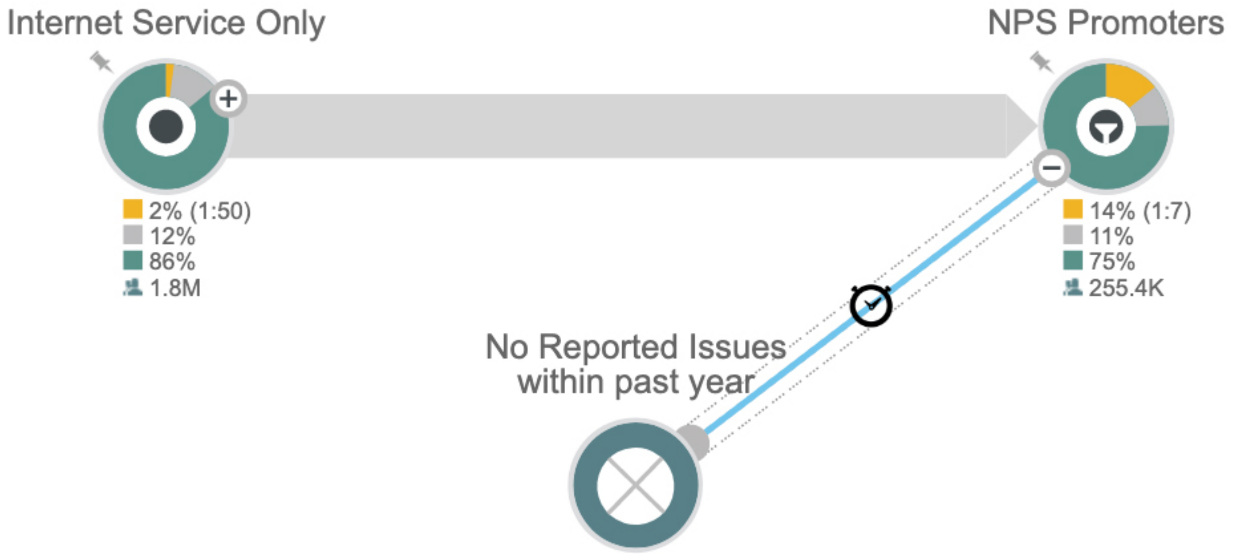

Behavior Discovery
NPS Promoter
No Support Issues Past Year
Internet Service Purchase
Bandwidth Upgrade
Home Security Cross-Sell
Visit Home Security Page
Address Changed
☐ divergent paths
number of paths
1
2
3
4
5
frequent (68%)
exclusive (0%)
predictive (32%)
Import to Journey
Cancel
Pause

Using machine learning, they find the most frequent and predictive behaviors shown by Internet Service customers that later went on to purchase a home security subscription.

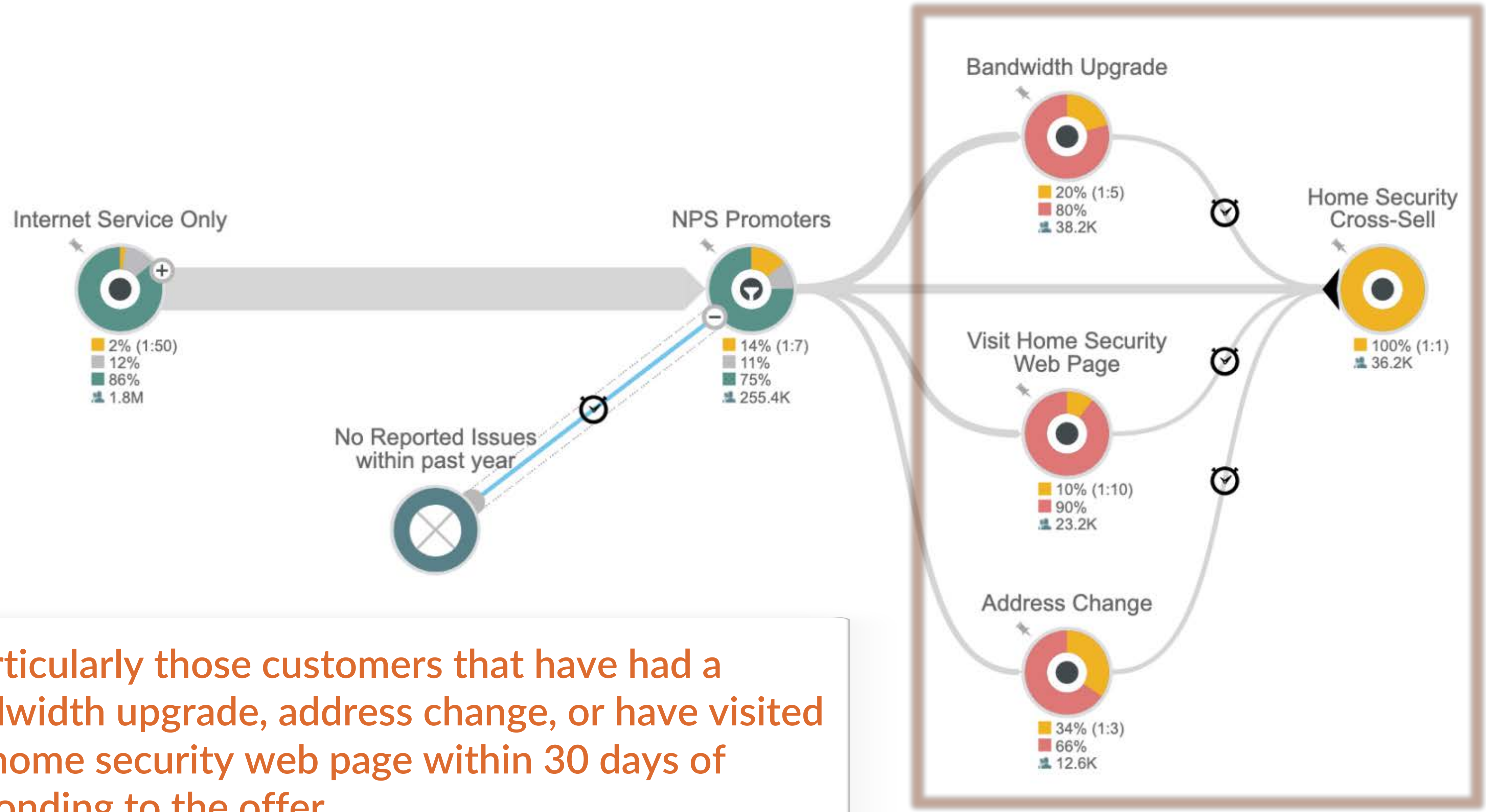
Revenue Growth

Increase Cross-Sell Rates

Pointillist


Internet Service Only
2% (1:50)
12%
86%
1.8M
NPS Promoters
14% (1:7)
11%
75%
255.4K
No Reported Issues
within past year

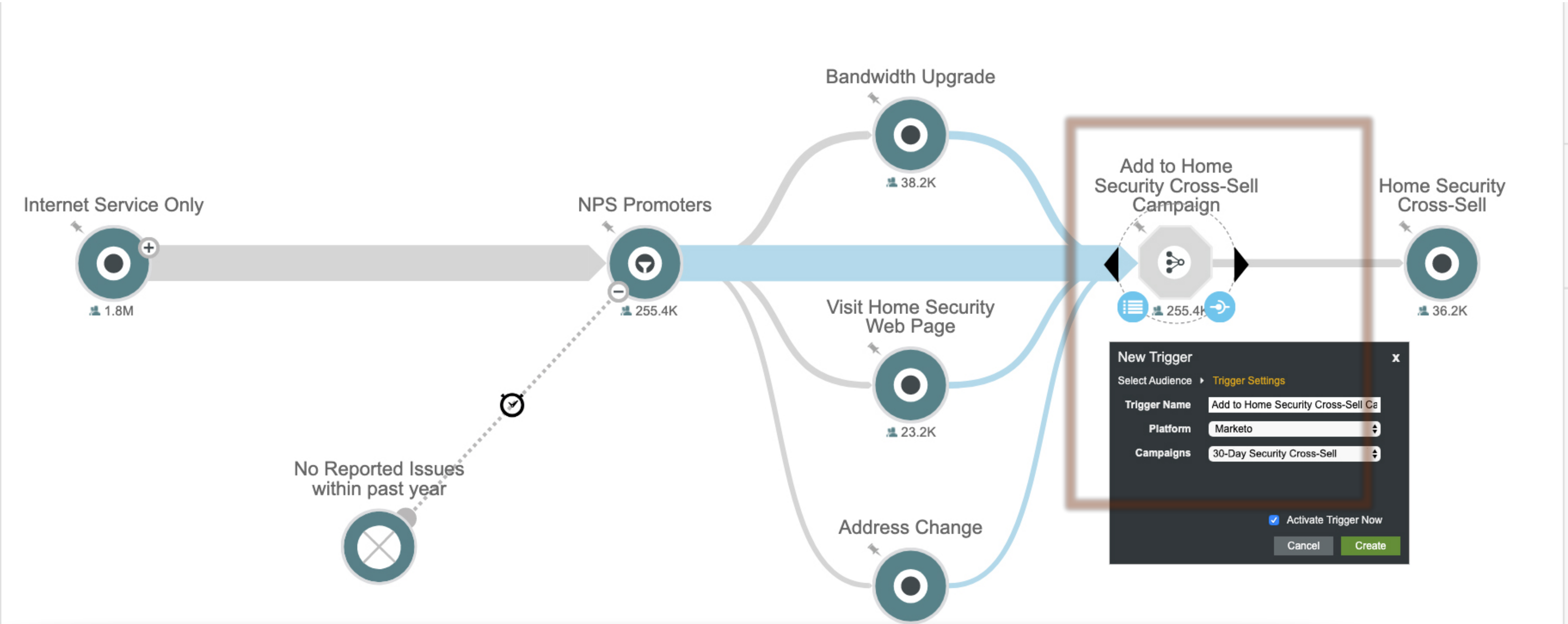
Customers that are Promoters and haven't reported any issues in the past year are much more likely to convert on a cross-sell offer...


Internet Service Only
🟧 2% (1:50)
▨ 12%
🟩 86%
1.8M
NPS Promoters
🟧 14% (1:7)
▨ 11%
🟩 75%
255.4K
No Reported Issues within past year
Bandwidth Upgrade
🟧 20% (1:5)
🟥 80%
38.2K
Visit Home Security Web Page
🟧 10% (1:10)
🟥 90%
23.2K
Address Change
🟧 34% (1:3)
🟥 66%
12.6K
Home Security Cross-Sell
🟧 100% (1:1)
36.2K

...particularly those customers that have had a bandwidth upgrade, address change, or have visited the home security web page within 30 days of responding to the offer.

Revenue Growth

Increase Cross-Sell Rates


Bandwidth Upgrade
38.2K
Internet Service Only
1.8M
NPS Promoters
255.4K
Add to Home Security Cross-Sell Campaign
255.4K
Home Security Cross-Sell
36.2K
Visit Home Security Web Page
23.2K
No Reported Issues within past year
Address Change
x
Cancel
Create

New Trigger

Select Audience ▸ Trigger Settings

Trigger Name Add to Home Security Cross-Sell Ca

Platform Marketo

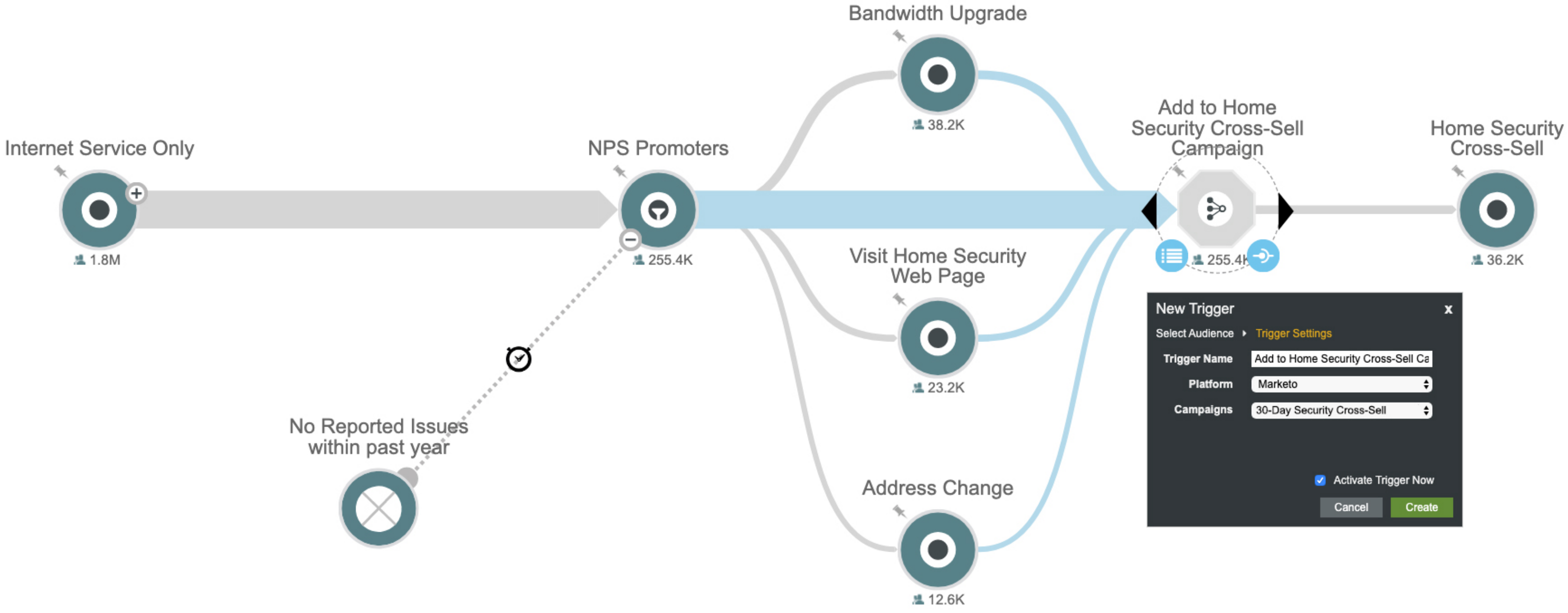
Campaigns 30-Day Security Cross-Sell

☑ Activate Trigger Now

The team sets up a trigger in Pointillist to automatically add Promoters that haven't had any support issues in the past year to a cross-sell campaign within 30 days after they exhibit any of the predetermined behaviors.

Revenue Growth

Increase Cross-Sell Rates


Internet Service Only
1.8M
NPS Promoters
255.4K
No Reported Issues within past year
Bandwidth Upgrade
38.2K
Visit Home Security Web Page
23.2K
Address Change
12.6K
Add to Home Security Cross-Sell Campaign
255.4K
Home Security Cross-Sell
36.2K

New Trigger x

Select Audience ▸ Trigger Settings

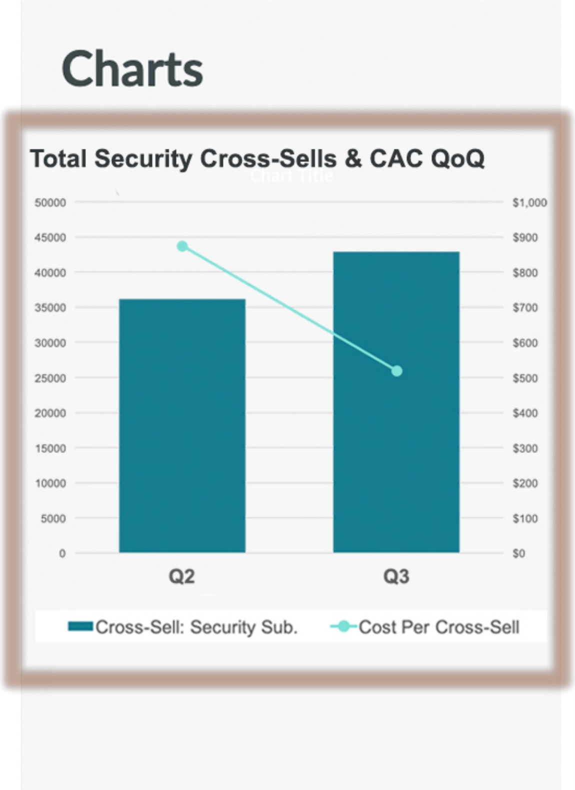
Trigger Name Add to Home Security Cross-Sell Ca

Platform Marketo

Campaigns 30-Day Security Cross-Sell

☑ Activate Trigger Now

Cancel Create



As a result, Home Security cross-sells increase by 18.5% over the previous quarter, while decreasing the cost per conversion by 39%

Revenue Growth

Increase Cross-Sell Rates

Pointillist

Revenue Growth

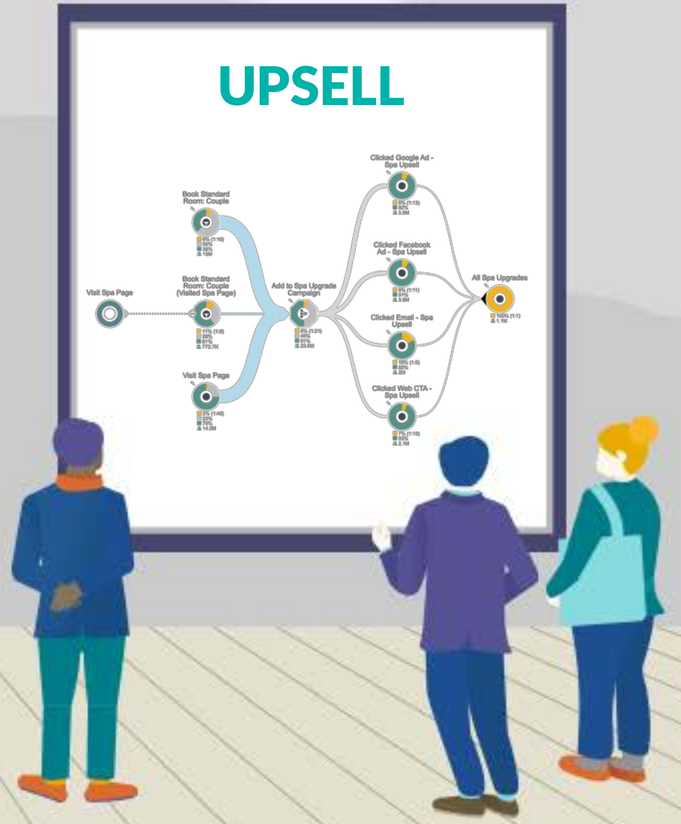
Discover Upsell Opportunities

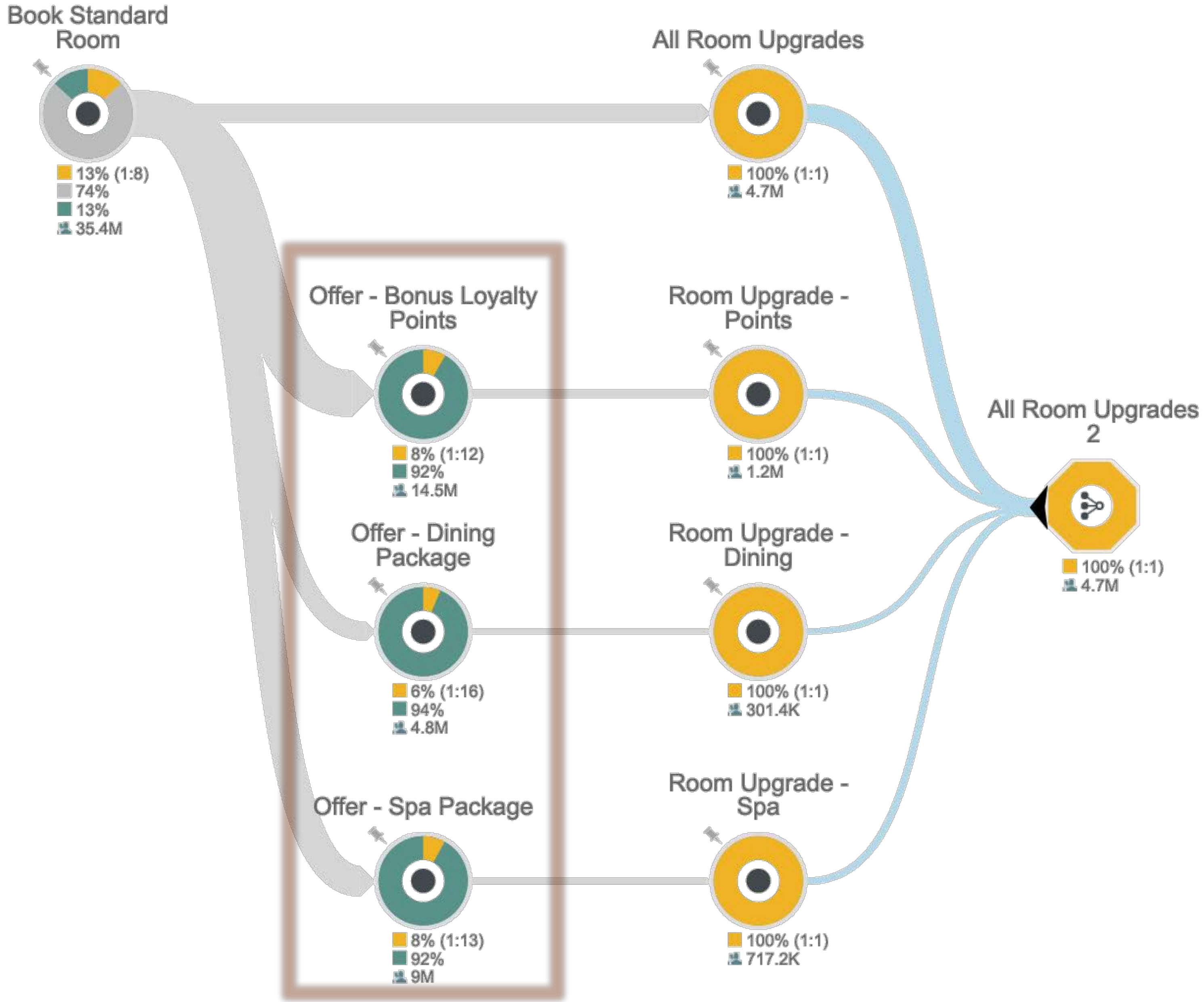
Industry:

Hospitality

Summary:

A luxury hotel and resort company uses Pointillist to identify customers to target with the right upsell offers, and orchestrate a personalized, cross-channel campaign to increase upsell conversions


UPSELL
Visit Spa Page
Book Standard Room: Couple
Book Standard Room: Couple (Visited Spa Page)
Visit Spa Page
Add to Spa Upgrade Campaign
Clicked Google Ad - Spa Upsell
Clicked Facebook Ad - Spa Upsell
Clicked Email - Spa Upsell
Clicked Web CTA - Spa Upsell
All Spa Upgrades

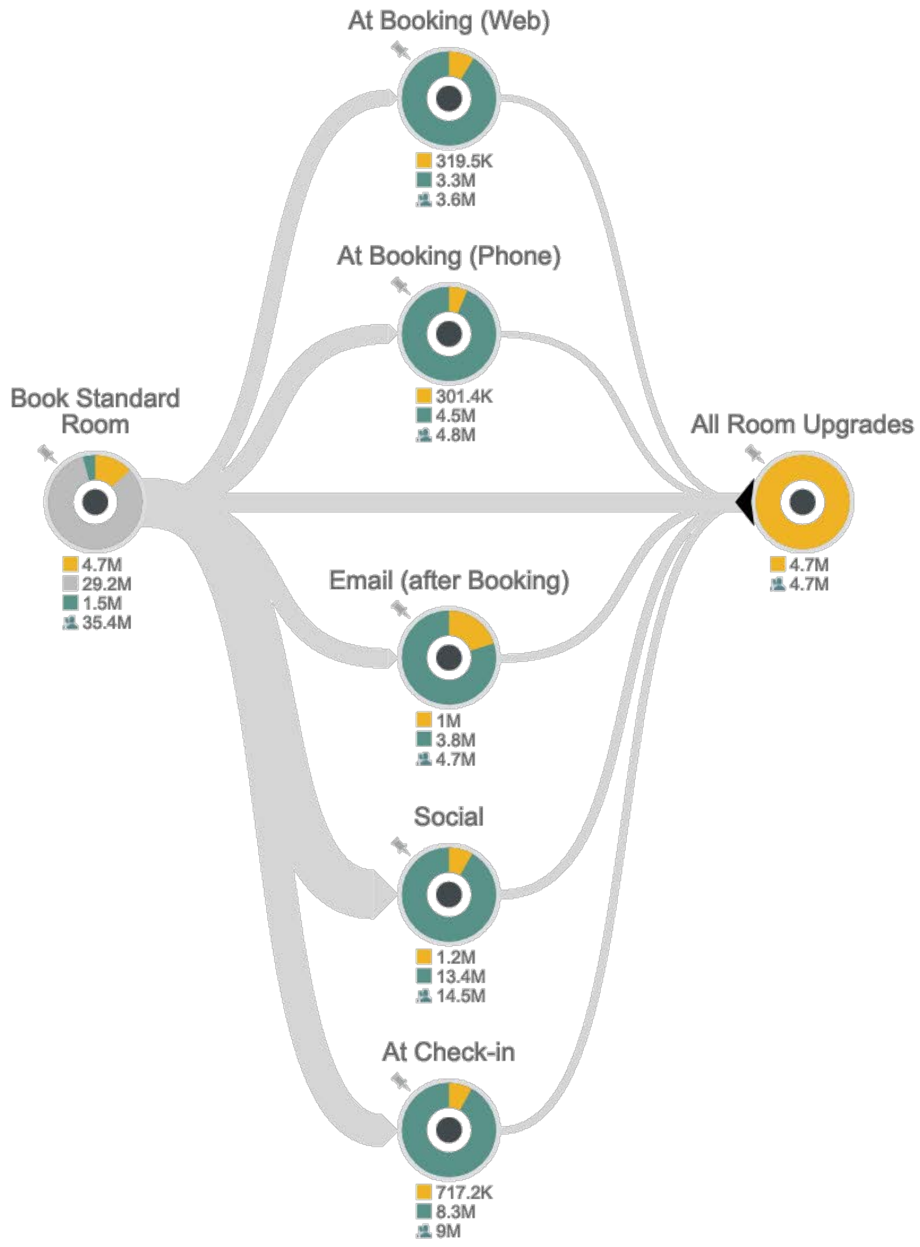

Book Standard Room
13% (1:8)
74%
13%
35.4M
All Room Upgrades
100% (1:1)
4.7M
Offer - Bonus Loyalty Points
8% (1:12)
92%
14.5M
Room Upgrade - Points
100% (1:1)
1.2M
All Room Upgrades 2
100% (1:1)
4.7M
Offer - Dining Package
6% (1:16)
94%
4.8M
Room Upgrade - Dining
100% (1:1)
301.4K
Offer - Spa Package
8% (1:13)
92%
9M
Room Upgrade - Spa
100% (1:1)
717.2K

The team first assesses the effectiveness of their existing upsell offers and finds that while more customers are offered extra loyalty points, the spa package converts at the same rate.

Revenue Growth

Discover Upsell Opportunities

Pointillist

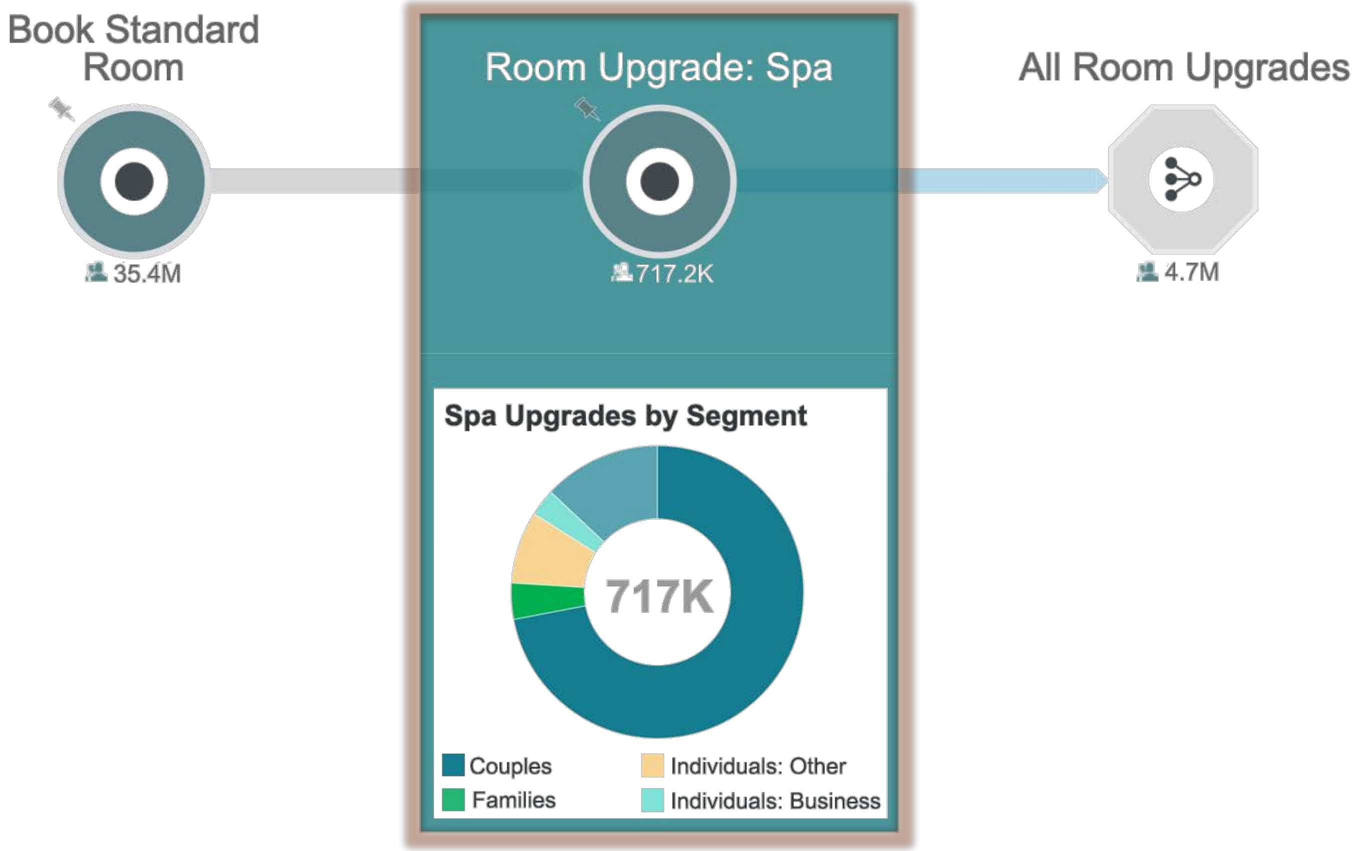

At Booking (Web)
319.5K
3.3M
3.6M
At Booking (Phone)
301.4K
4.5M
4.8M
Book Standard Room
4.7M
29.2M
1.5M
35.4M
All Room Upgrades
4.7M
4.7M
Email (after Booking)
1M
3.8M
4.7M
Social
1.2M
13.4M
14.5M
At Check-in
717.2K
8.3M
9M

Next, the team determines which channels and timing are most effective. Sending the upgrade offer via email after the initial room has been booked is converting at the highest rate, while the largest number of upsells are being generated using social ads.

Revenue Growth

Discover Upsell Opportunities

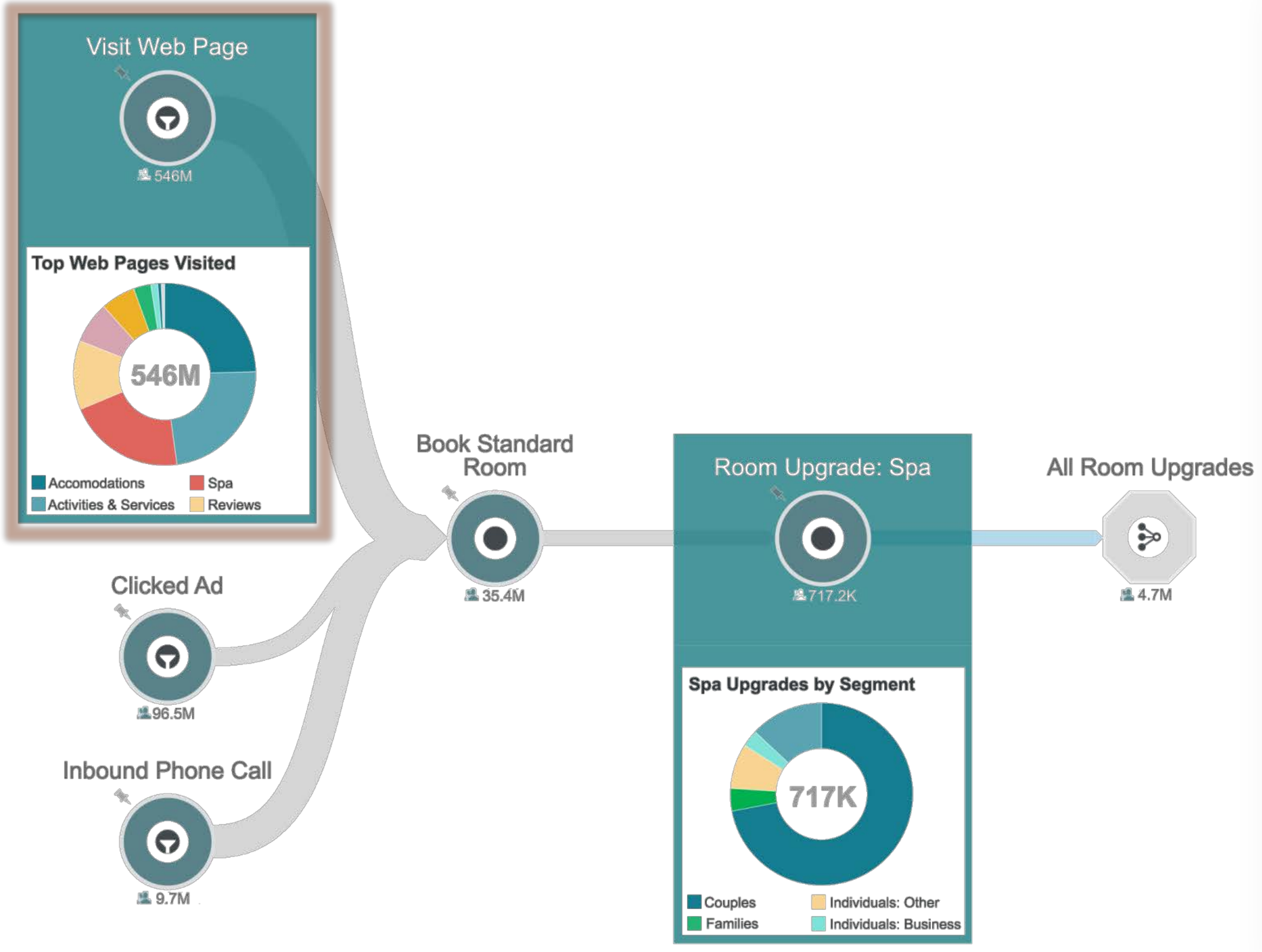
Pointillist

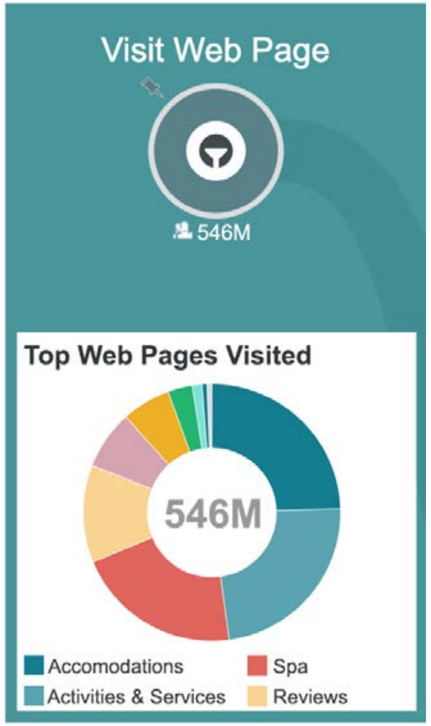

Book Standard Room
35.4M
Room Upgrade: Spa
717.2K
All Room Upgrades
4.7M
Spa Upgrades by Segment
717K
Couples
Individuals: Other
Families
Individuals: Business

Further analysis reveals that 72% of guests that upgraded via the spa package were couples.

Revenue Growth

Discover Upsell Opportunities


Visit Web Page
546M
Top Web Pages Visited
546M
Accomodations
Spa
Activities & Services
Reviews
Clicked Ad
96.5M
Inbound Phone Call
9.7M
Book Standard Room
35.4M
Room Upgrade: Spa
717.2K
Spa Upgrades by Segment
717K
Couples
Individuals: Other
Families
Individuals: Business
All Room Upgrades
4.7M

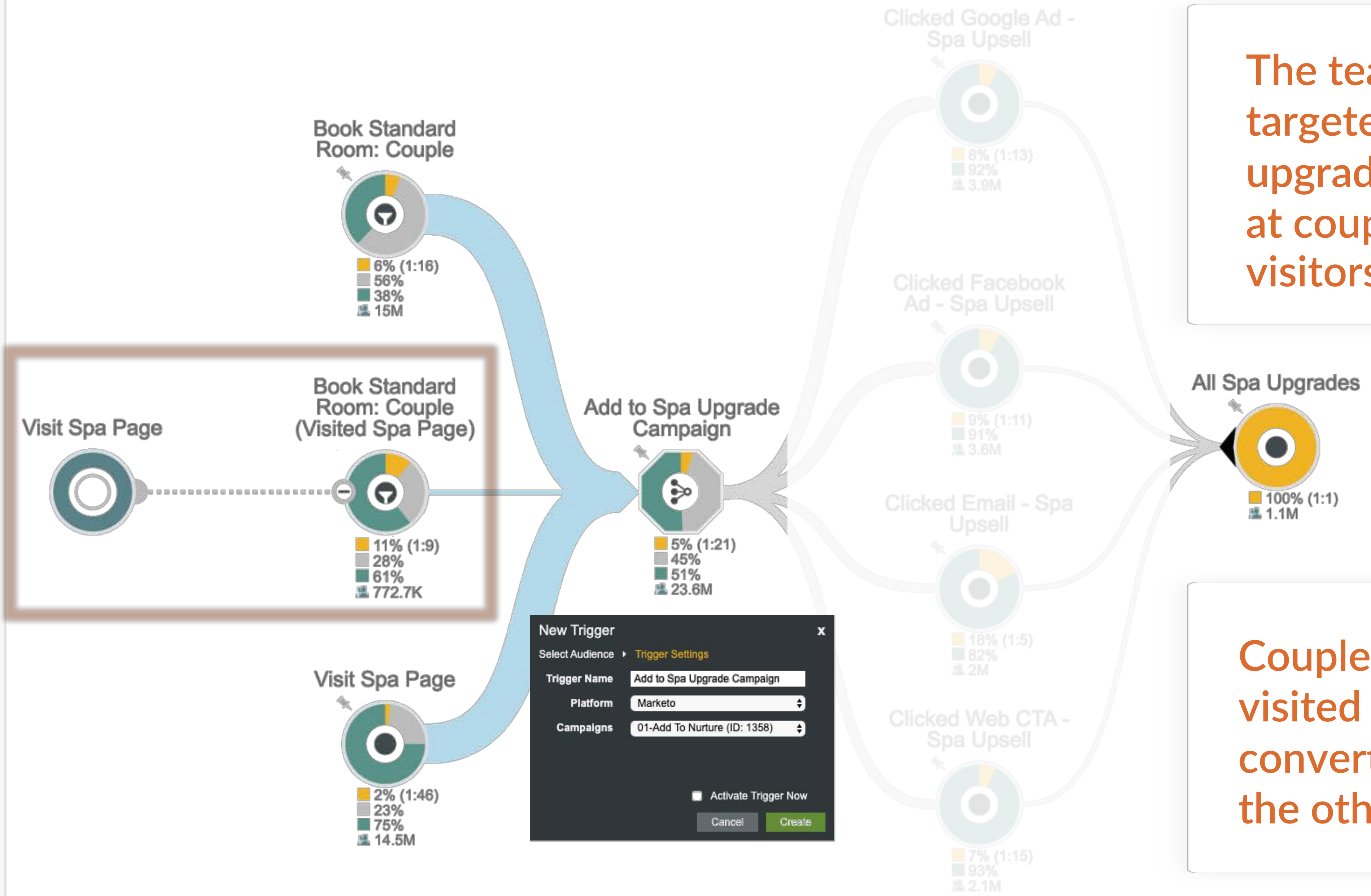


Many of these customers had also visited the spa web page as an anonymous visitor before booking their standard room.

Revenue Growth

Discover Upsell Opportunities

Pointillist


Clicked Google Ad - Spa Upsell
8% (1:13)
92%
3.9M
Book Standard Room: Couple
6% (1:16)
56%
38%
15M
Clicked Facebook Ad - Spa Upsell
9% (1:11)
91%
3.6M
All Spa Upgrades
100% (1:1)
1.1M
Visit Spa Page
Book Standard Room: Couple (Visited Spa Page)
11% (1:9)
28%
61%
772.7K
Add to Spa Upgrade Campaign
5% (1:21)
45%
51%
23.6M
Clicked Email - Spa Upsell
18% (1:5)
82%
2M
Visit Spa Page
2% (1:46)
23%
75%
14.5M
Clicked Web CTA - Spa Upsell
7% (1:15)
93%
2.1M
New Trigger
x
Select Audience
Trigger Settings
Cancel
Create

Trigger Name: Add to Spa Upgrade Campaign

Platform: Marketo

Campaigns: 01-Add To Nurture (ID: 1358)

☐ Activate Trigger Now

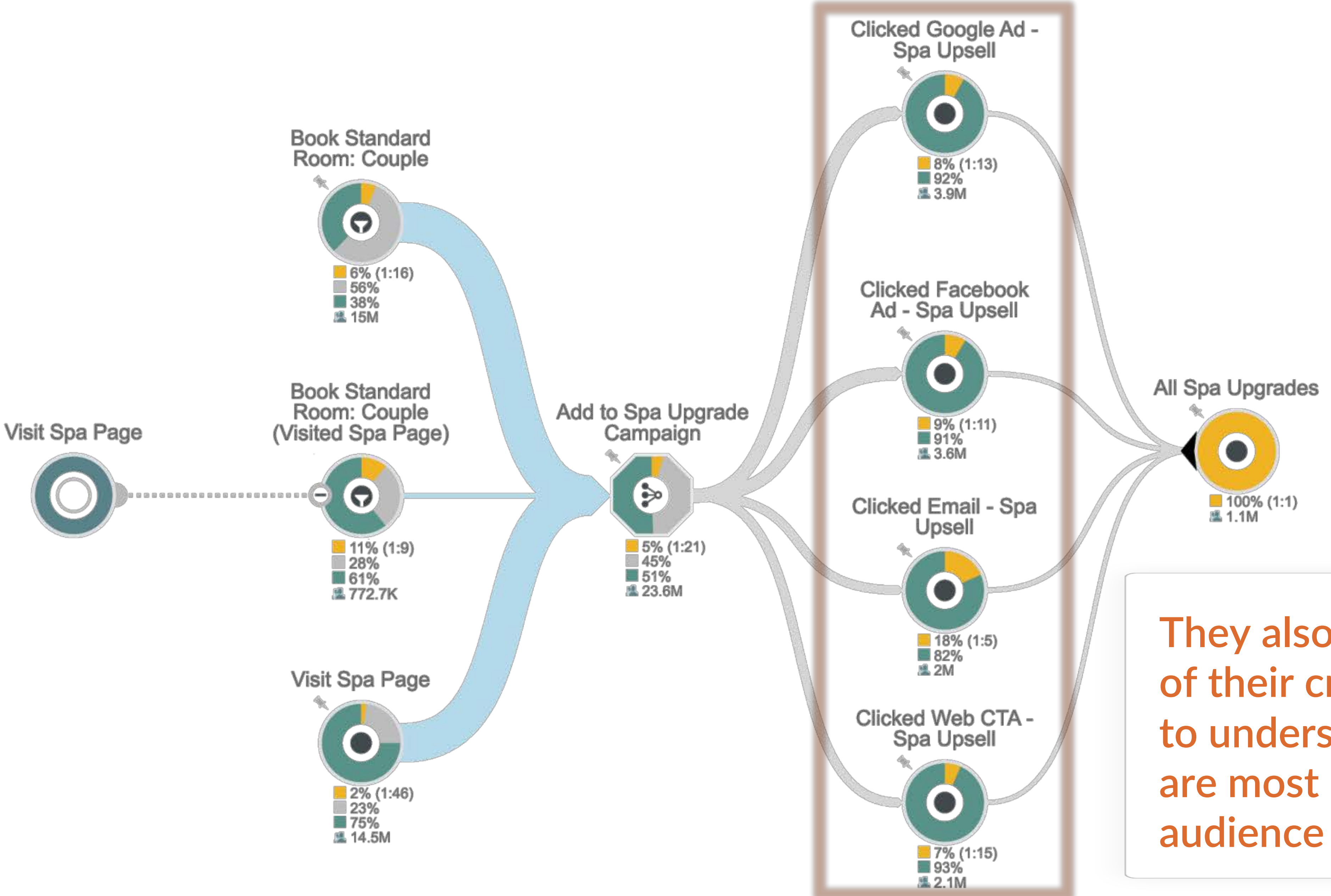
The team orchestrates a targeted cross-channel spa upgrade campaign targeted at couples and spa page visitors.

Couples that had previously visited the spa page converted 2-5X higher than the other segments.

Revenue Growth

Discover Upsell Opportunities

Pointillist


Visit Spa Page
Book Standard Room: Couple
6% (1:16)
56%
38%
15M
Book Standard Room: Couple (Visited Spa Page)
11% (1:9)
28%
61%
772.7K
Visit Spa Page
2% (1:46)
23%
75%
14.5M
Add to Spa Upgrade Campaign
5% (1:21)
45%
51%
23.6M
Clicked Google Ad - Spa Upsell
8% (1:13)
92%
3.9M
Clicked Facebook Ad - Spa Upsell
9% (1:11)
91%
3.6M
Clicked Email - Spa Upsell
18% (1:5)
82%
2M
Clicked Web CTA - Spa Upsell
7% (1:15)
93%
2.1M
All Spa Upgrades
100% (1:1)
1.1M

They also assessed the impact of their cross-channel campaign to understand which channels are most effective for each audience and cross-sell offer.

Revenue Growth

Discover Upsell Opportunities

Pointillist

Customer Loyalty: Retention & Churn

Pointillist

Customer Loyalty: Retention & Churn

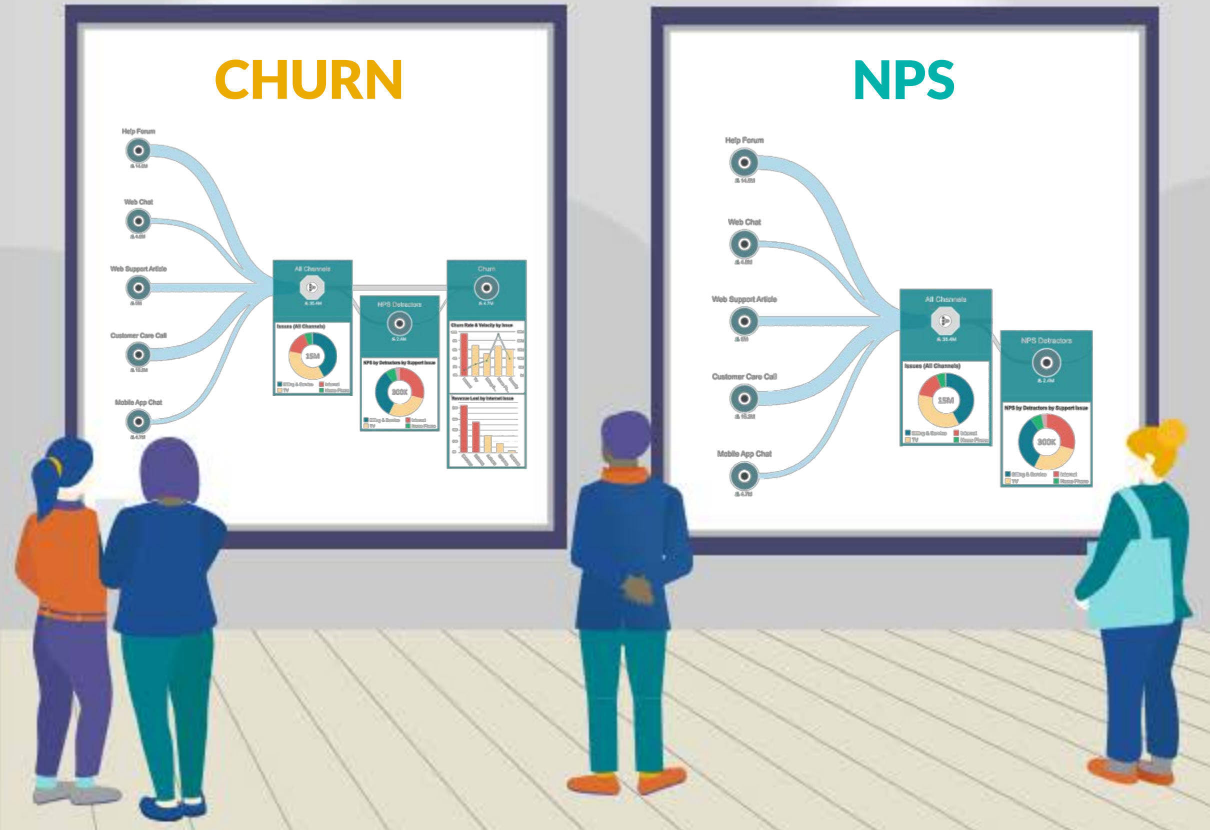
Identify & Prioritize High Impact CX Issues Leading to Churn

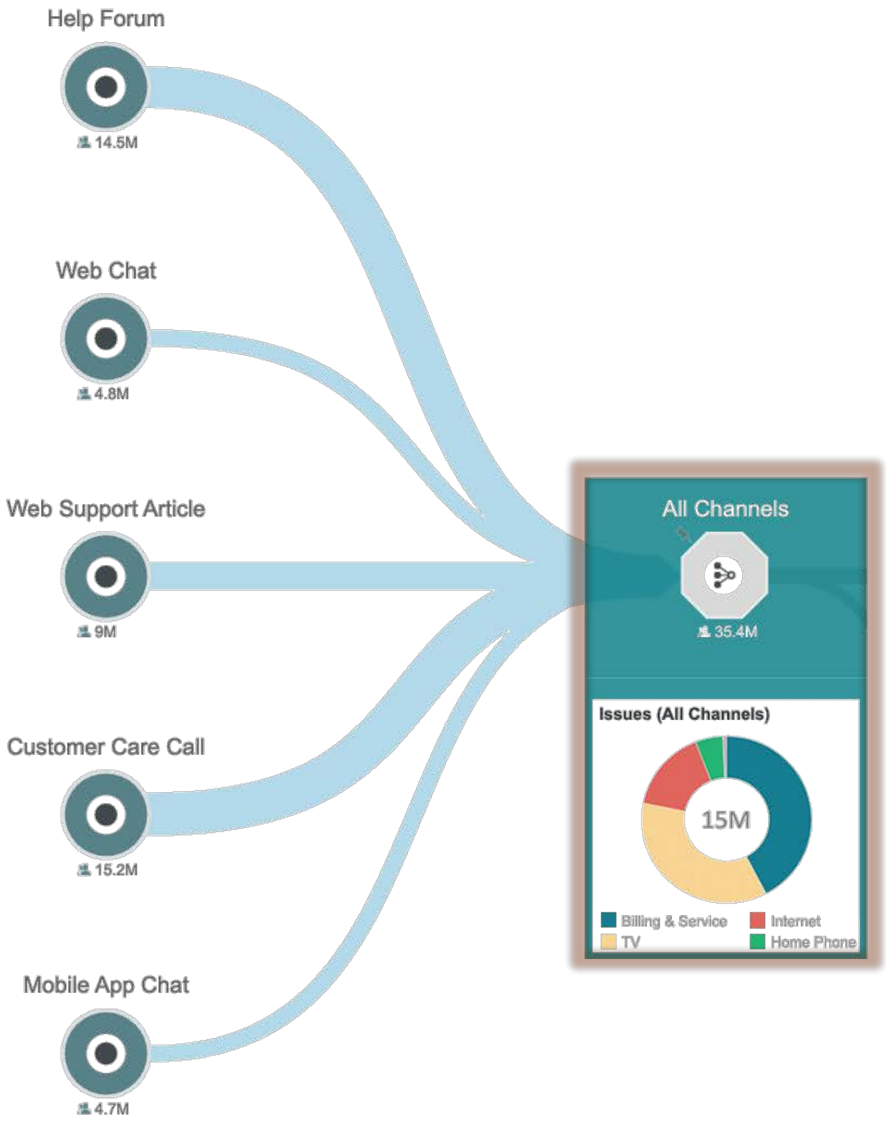
Industry:

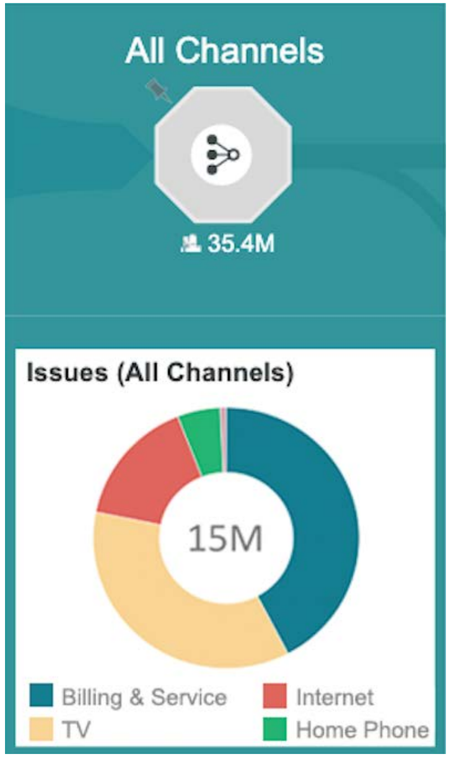
Telecommunications

Summary:

A leading telecom provider uses Pointillist to understand the drivers of churn, so they can identify and prioritize CX initiatives that will have the largest impact on reducing churn.


CHURN
Help Forum
Web Chat
Web Support Article
Customer Care Call
Mobile App Chat
All Channels
Issues (All Channels)
15M
NPS Detractors
NPS by Detractors by Support Issue
300K
Churn
Churn Rate & Velocity by Issue
Revenue Lost by Internet Issue
NPS
Help Forum
Web Chat
Web Support Article
Customer Care Call
Mobile App Chat
All Channels
Issues (All Channels)
15M
NPS Detractors
NPS by Detractors by Support Issue
300K

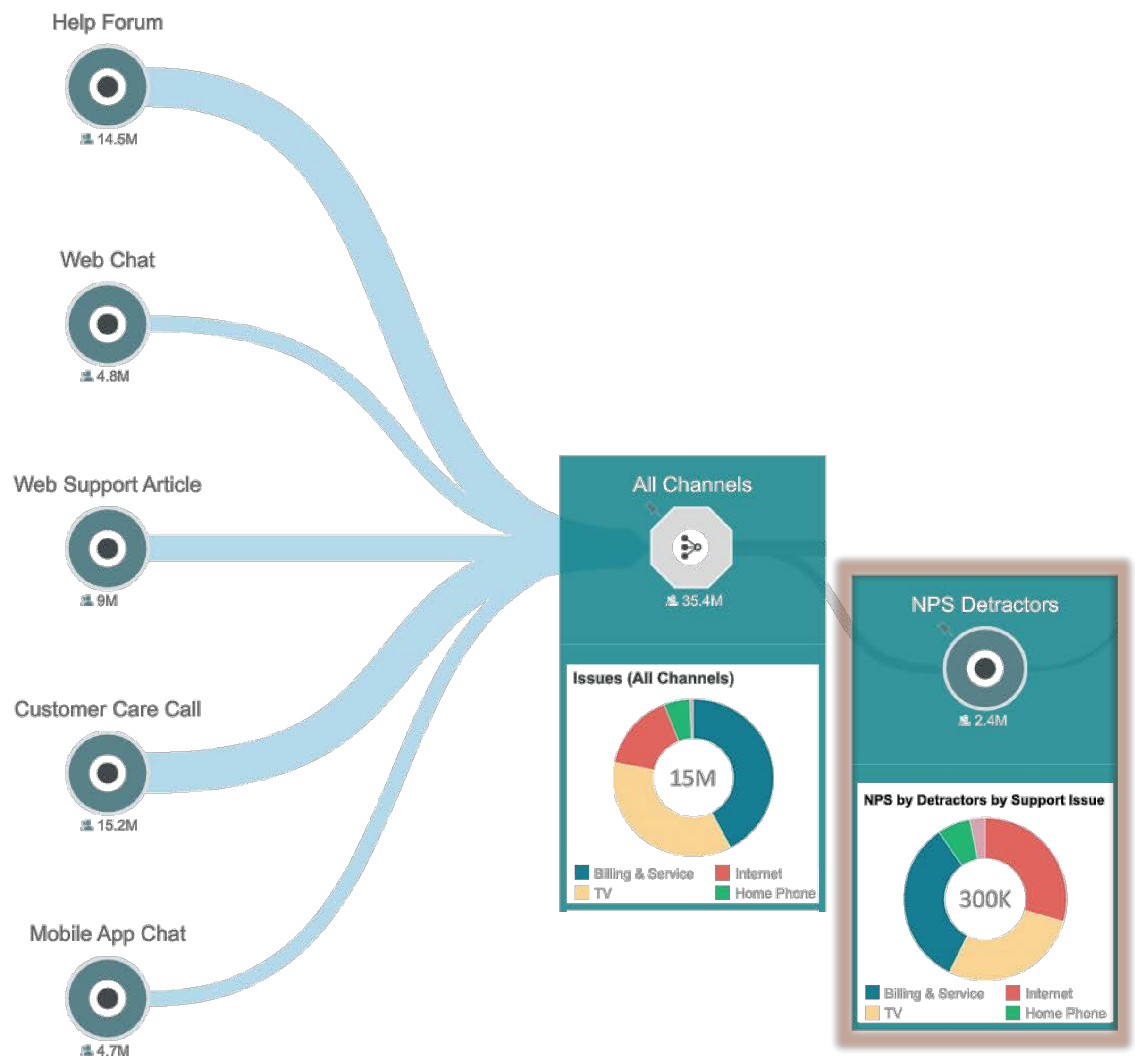

Help Forum
14.5M
Web Chat
4.8M
Web Support Article
9M
Customer Care Call
15.2M
Mobile App Chat
4.7M
All Channels
35.4M
Issues (All Channels)
15M
Billing & Service
Internet
TV
Home Phone



The team assesses the volume of support issues across all their support channels and finds that TV & billing issues are the most prevalent.

Customer Loyalty: Retention & Churn

Identify & Prioritize High Impact CX Issues Leading to Churn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300K
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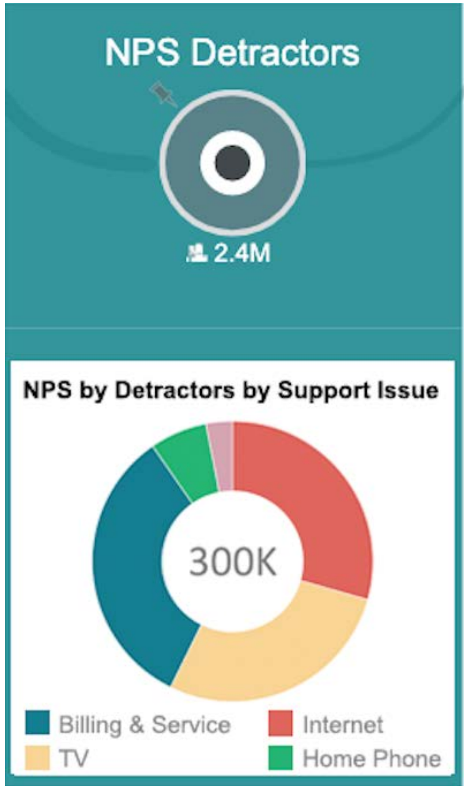


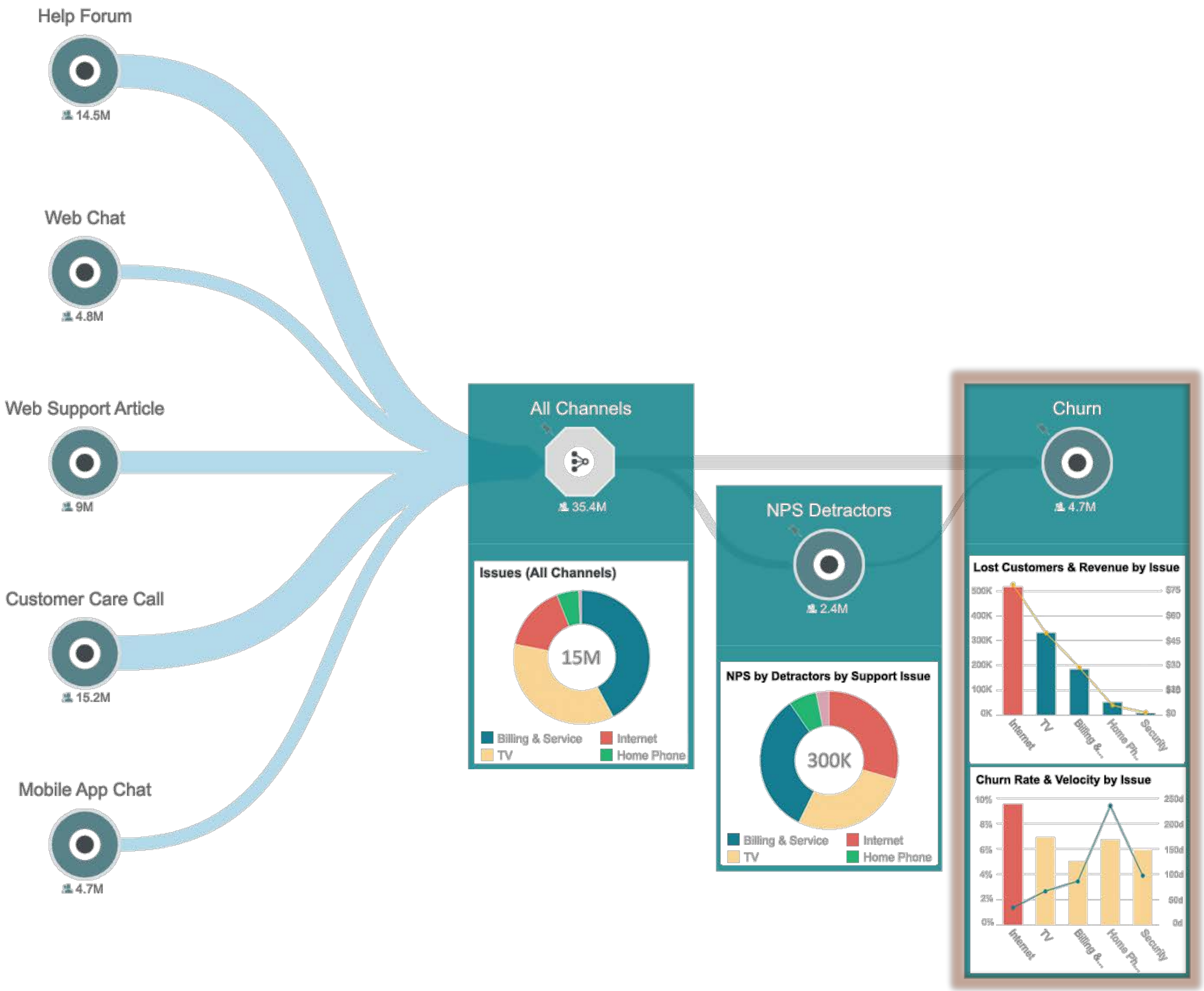
TV, billing and internet issues are also leading to the highest number of NPS detractors

Customer Loyalty: Retention & Churn

Identify & Prioritize High Impact CX Issues Leading to Churn

Customer Loyalty: Retention & Churn

Identify & Prioritize High Impact CX Issues Leading to Churn


Help Forum
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Web Support Article
9M
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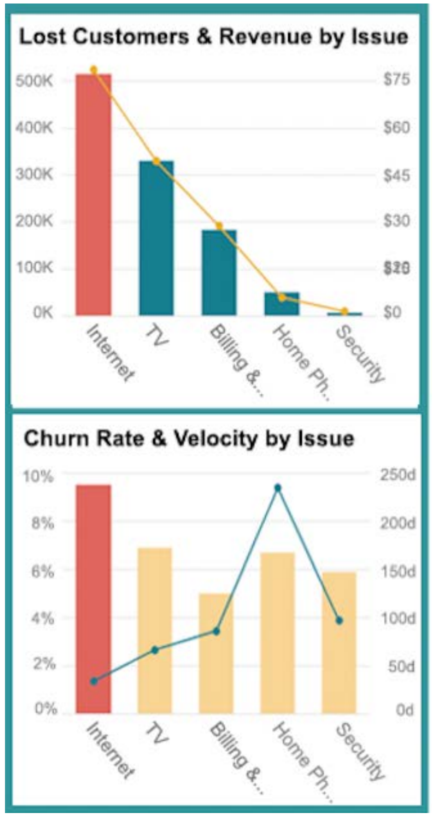
15.2M
Mobile App Chat
4.7M
All Channels
35.4M
Issues (All Channels)
15M
Billing & Service
Internet
TV
Home Phone
NPS Detractors
2.4M
NPS by Detractors by Support Issue
300K
Billing & Service
Internet
TV
Home Phone
Churn
4.7M
Lost Customers & Revenue by Issue
Churn Rate & Velocity by Issue



But internet issues have the greatest impact on revenue, the largest churn rate and the highest churn velocity.

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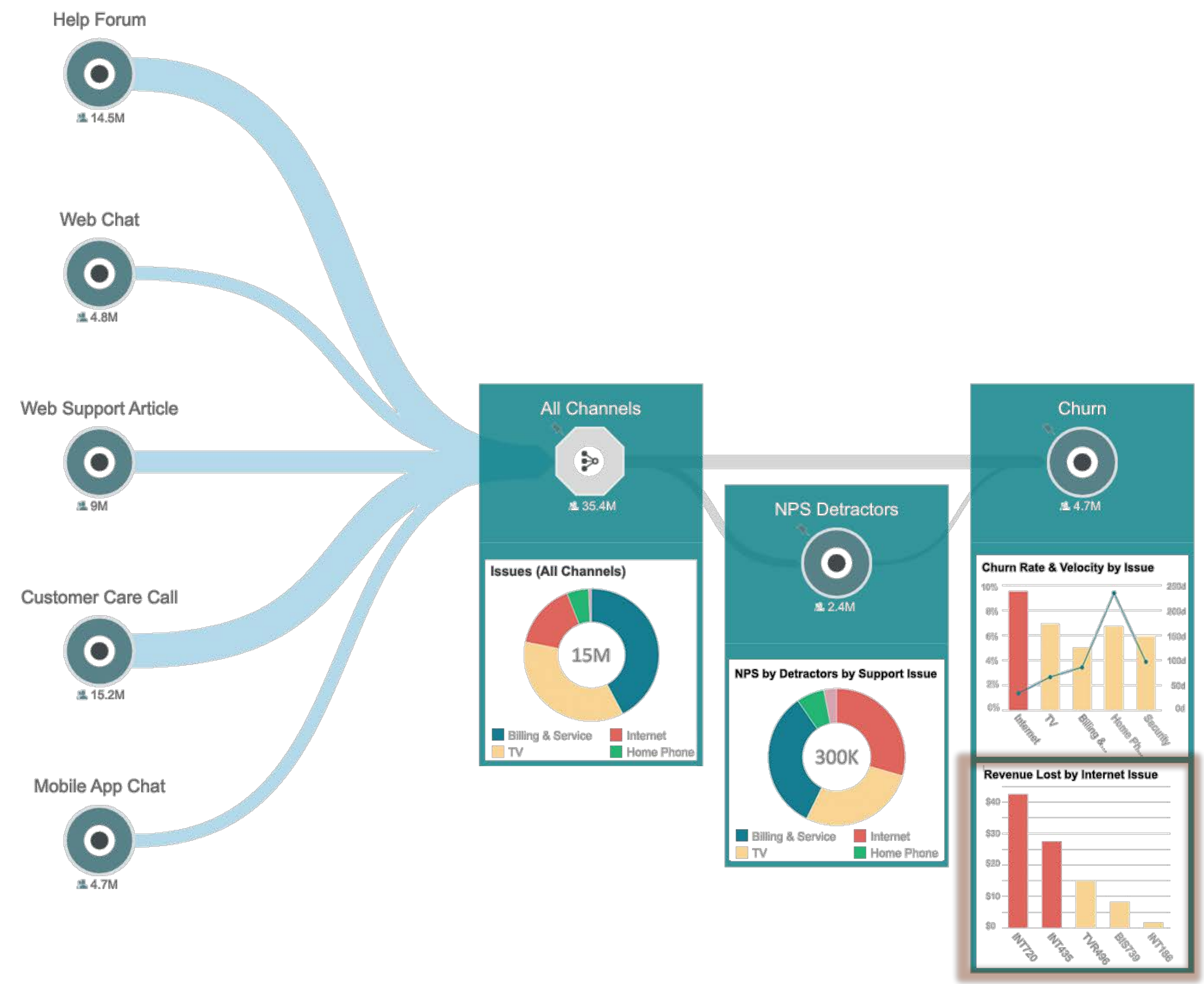
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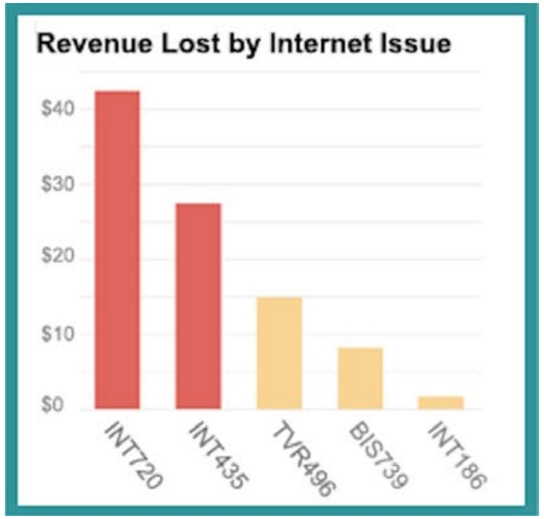
NPS by Detractors by Support Issue
300K
Billing & Service
Internet
TV
Home Phone
Churn
4.7M
Churn Rate & Velocity by Issue
10%
8%
6%
4%
2%
0%
250d
200d
150d
100d
50d
0d
Internet
TV
Billing &...
Home Ph...
Security
Revenue Lost by Internet Issue
$40
$30
$20
$10
$0
INT720
INT435
TVR496
BIS739
INT186



They also identify two specific internet issues that have the largest impact on churn and revenue loss.

Customer Loyalty: Retention & Churn

Identify & Prioritize High Impact CX Issues Leading to Churn

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Customer Loyalty: Retention & Churn

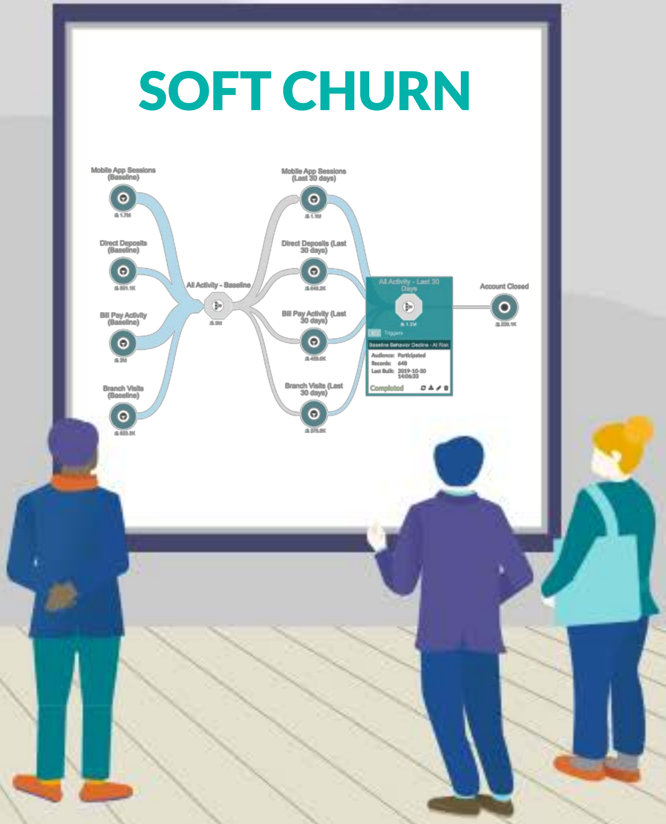
Identify Customers at Risk of Soft Churn

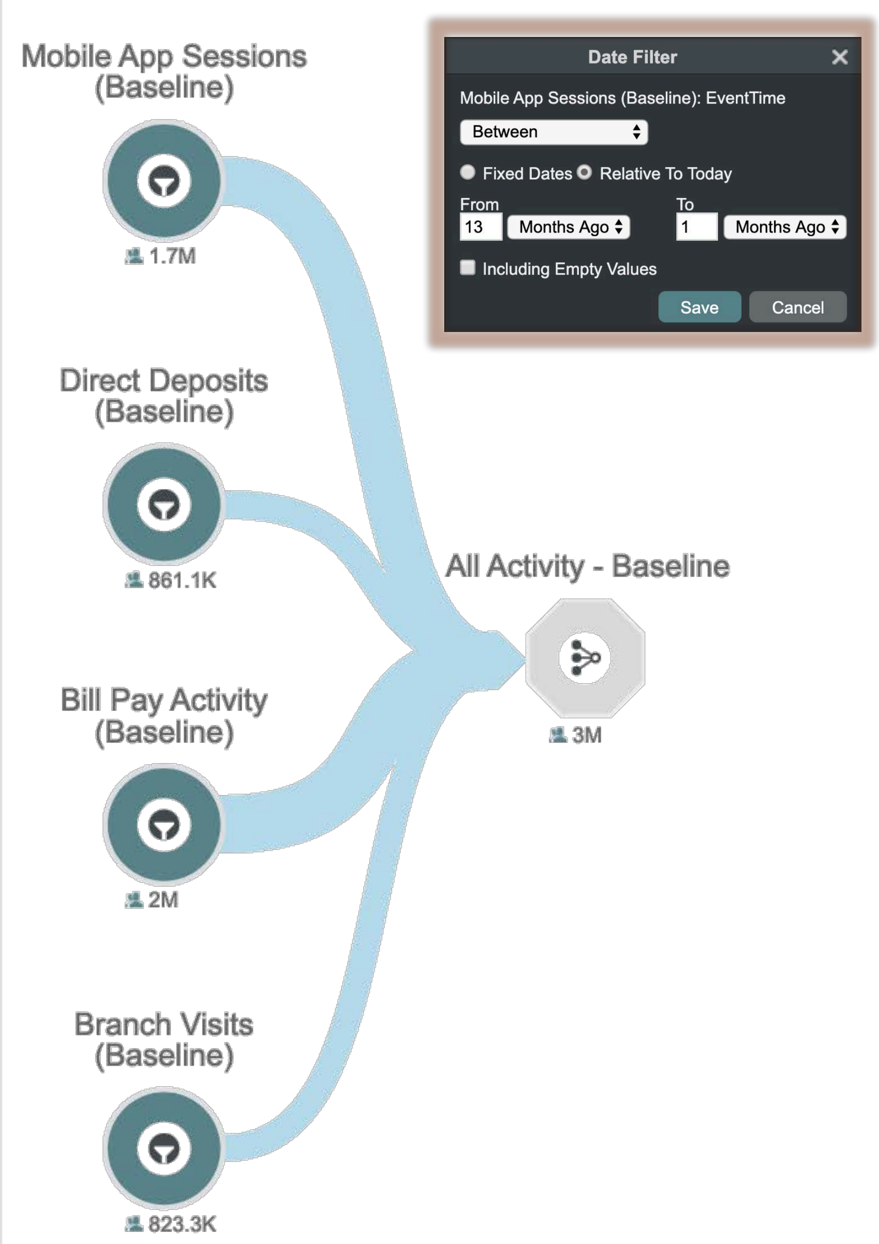
Industry:

Financial Services

Summary:

A retail bank uses Pointillist to understand customer behaviors that are predictive of soft churn to identify at-risk customers, and understand the most significant indicators of impending soft churn.


SOFT CHURN
Mobile App Sessions (Baseline)
Direct Deposits (Baseline)
Bill Pay Activity (Baseline)
Branch Visits (Baseline)
All Activity - Baseline
Mobile App Sessions (Last 30 days)
Direct Deposits (Last 30 days)
Bill Pay Activity (Last 30 days)
Branch Visits (Last 30 days)
All Activity - Last 30 Days
Triggers
Baseline Behavior Decline - At Risk
Audience: Participated
Records: 648
Last Built: 2019-10-30 14:06:33
Completed
Account Closed


Mobile App Sessions (Baseline)
1.7M
Direct Deposits (Baseline)
861.1K
Bill Pay Activity (Baseline)
2M
Branch Visits (Baseline)
823.3K
All Activity - Baseline
3M

Date Filter ✕

Mobile App Sessions (Baseline): EventTime

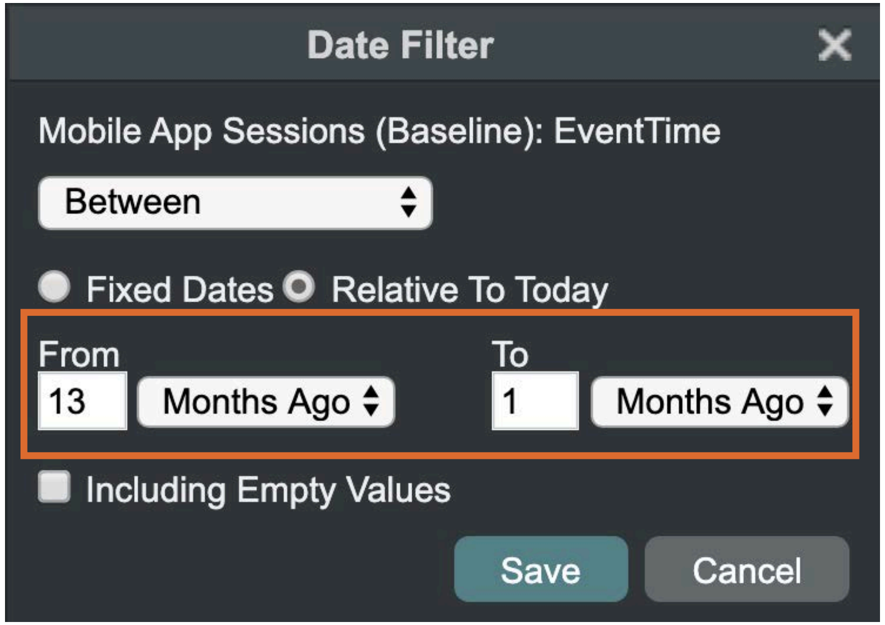
Between

○ Fixed Dates ● Relative To Today

From 13 Months Ago — To 1 Months Ago

☐ Including Empty Values

Save
Cancel


Date Filter ✕

Mobile App Sessions (Baseline): EventTime

Between

○ Fixed Dates ● Relative To Today

From 13 Months Ago — To 1 Months Ago

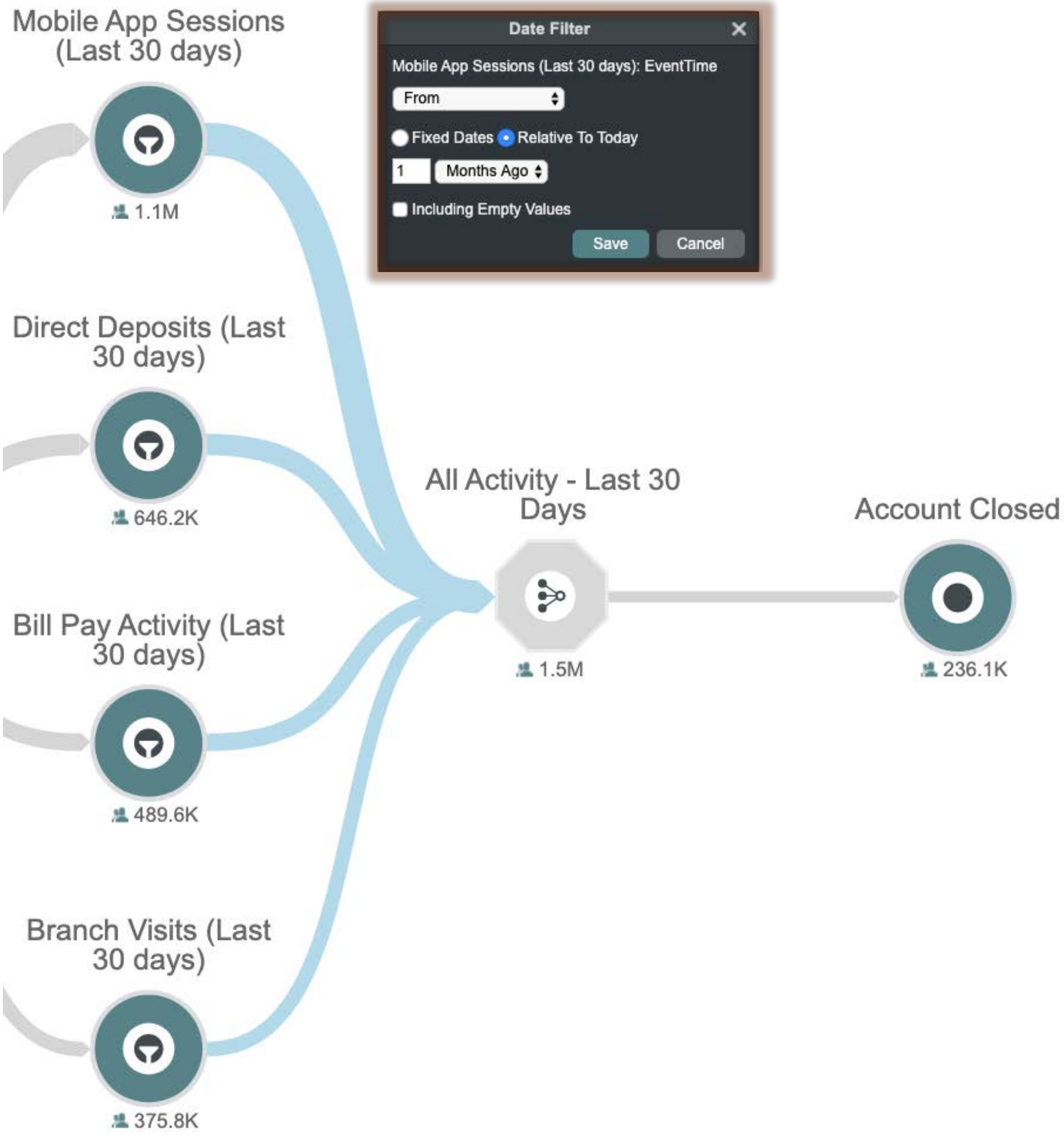
☐ Including Empty Values
Save
Cancel

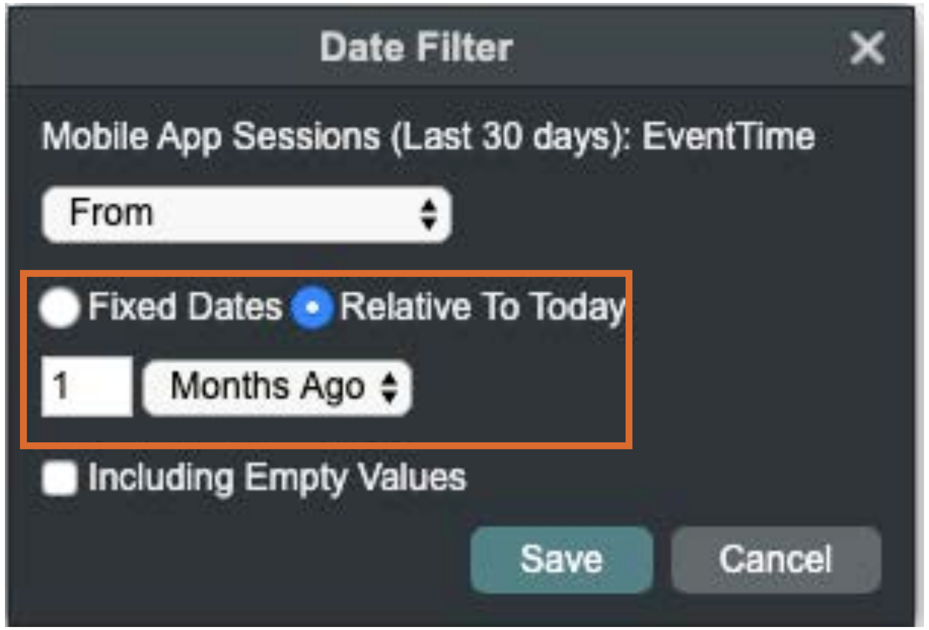
First, the team creates a rolling 12-month baseline of customer behavior that may be predictive of soft churn, including mobile app sessions, direct deposits, bill pay activity and branch visits.

Customer Loyalty: Retention & Churn

Identify Customers At Risk of Soft Churn

Pointillist


Mobile App Sessions (Last 30 days)
1.1M
Direct Deposits (Last 30 days)
646.2K
Bill Pay Activity (Last 30 days)
489.6K
Branch Visits (Last 30 days)
375.8K
All Activity - Last 30 Days
1.5M
Account Closed
236.1K
Date Filter
Save
Cancel


Date Filter

Mobile App Sessions (Last 30 days): EventTime

From

○ Fixed Dates ● Relative To Today

1 Months Ago

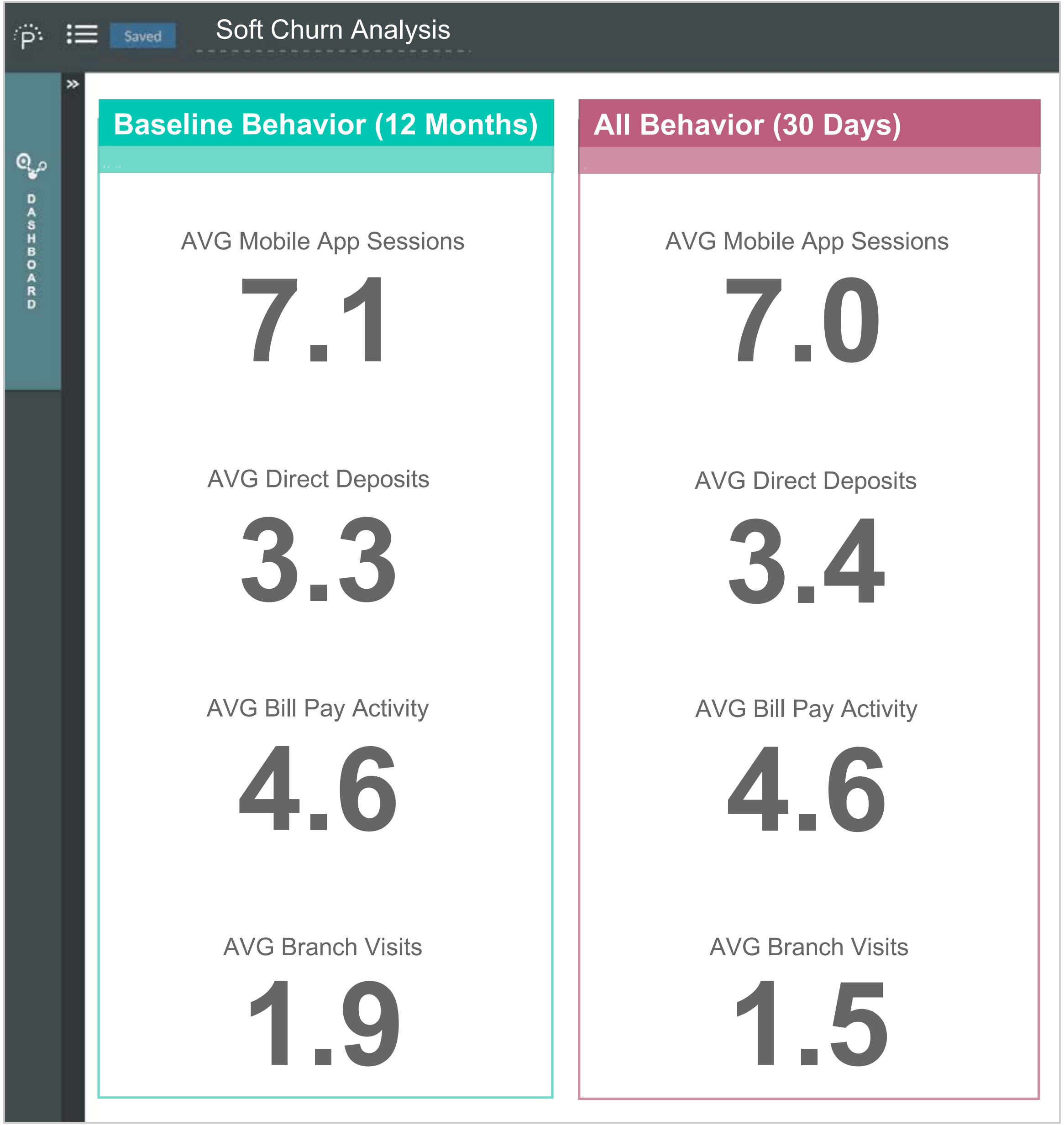
☐ Including Empty Values

Save
Cancel

Then they assess the same behaviors over the past month to compare the most recent behavior with behavior over the previous 12 months.

Customer Loyalty: Retention & Churn

Identify Customers At Risk of Soft Churn



Soft Churn Analysis

Baseline Behavior (12 Months)	All Behavior (30 Days)
AVG Mobile App Sessions 7.1	AVG Mobile App Sessions 7.0
AVG Direct Deposits 3.3	AVG Direct Deposits 3.4
AVG Bill Pay Activity 4.6	AVG Bill Pay Activity 4.6
AVG Branch Visits 1.9	AVG Branch Visits 1.5

Not surprisingly, each behavior is fairly constant at an aggregate level across the entire customer base.

Customer Loyalty: Retention & Churn

Identify Customers At Risk of Soft Churn

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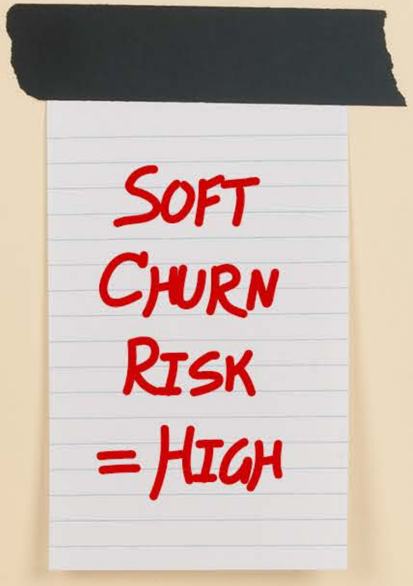
CHRIS FIELD


SOFT
CHURN
RISK
= HIGH

Chris’ Baseline Behavior	Chris’ 30 Days Behavior
AVG Mobile App Sessions 6.4	Mobile App Sessions 1
AVG Direct Deposits 2	Direct Deposits 0
AVG Bill Pay Activity 4	Bill Pay Activity 0
AVG Branch Visits 1.7	AVG Branch Visits 0

But what the bank really wants to find is the *individual* customers whose behaviors have significantly changed.

Customer Loyalty: Retention & Churn

Identify Customers At Risk of Soft Churn

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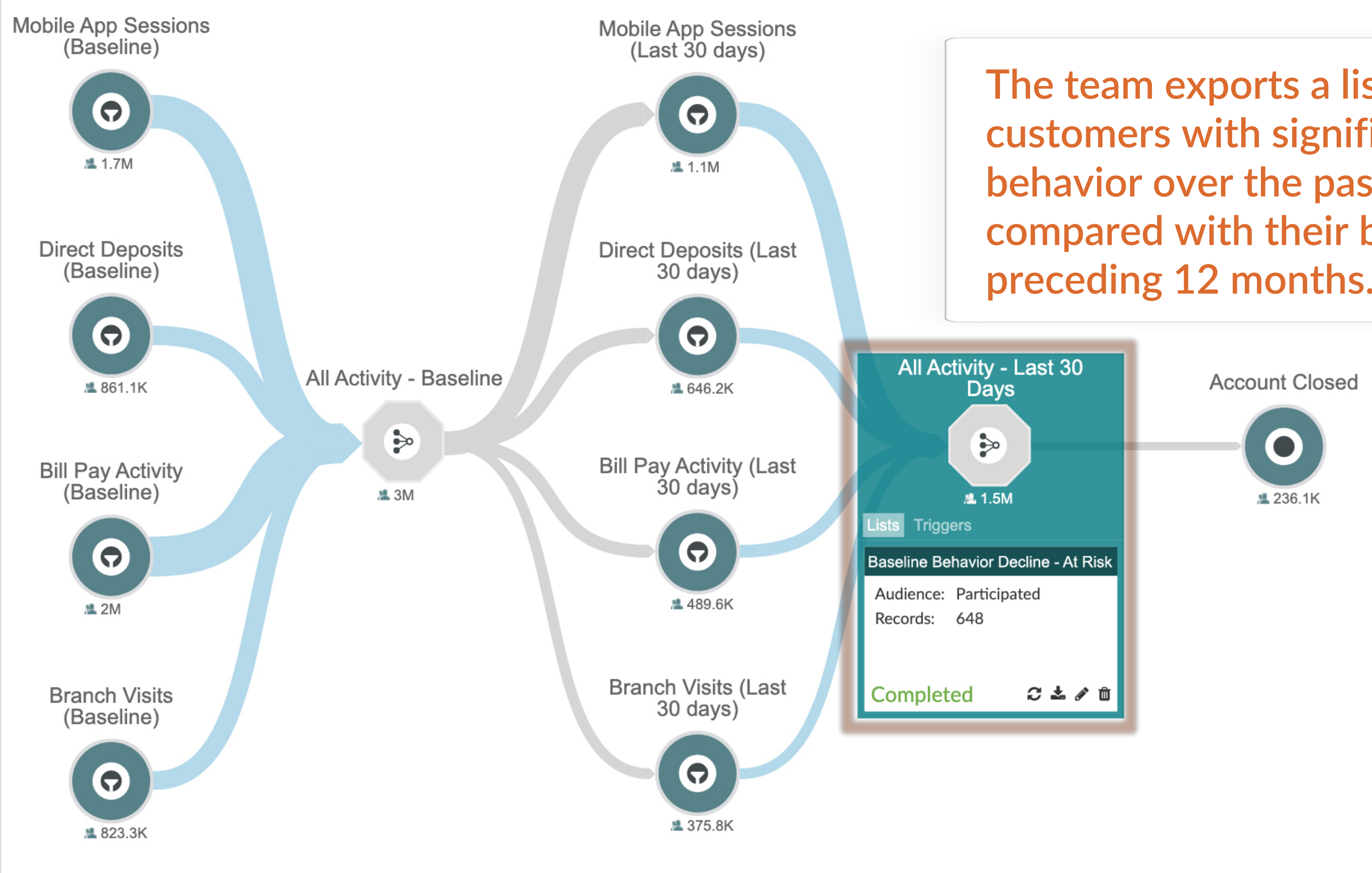
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Bill Pay Activity (Last 30 days)
489.6K
Branch Visits (Last 30 days)
375.8K
All Activity - Last 30 Days
1.5M
Lists
Triggers
Account Closed
236.1K

Baseline Behavior Decline - At Risk

Audience: Participated

Records: 648

Completed

The team exports a list of all individual customers with significant changes in behavior over the past 30 days, as compared with their behavior over the preceding 12 months.

Customer Loyalty: Retention & Churn

Identify Customers At Risk of Soft Churn

Recap: Primary Customer Journey Analytics Use Cases

Operational Efficiency			CX Improvement	Revenue Growth		Customer Loyalty
Cost Savings	**CX Efficiency**	**Process Improvement**	**VoC Measurement**	**Customer Acquisition**	**Customer Lifetime Value**	**Retention & Churn**
Example: • Decrease call volume & cost to serve	Example: • Measure & improve self-help effectiveness	Example: • Optimize communication channels	Examples: • Prioritize initiatives to improve CX • Pinpoint drivers behind your CX metrics • Quantify the ROI of CX	Example: • Improve conversion & customer acquisition cost	Examples: • Increase cross-sell • Increase upsell	Examples: • Identify issues that lead to churn • Analyze behavior associated with high customer lifetime value

Thank You!

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Journey Visioning Platforms

Powerful Insights. Visualized. Actionable.

Pointillist customer journey analytics software rapidly uncovers customer insights, so you can dramatically improve marketing and customer experience.

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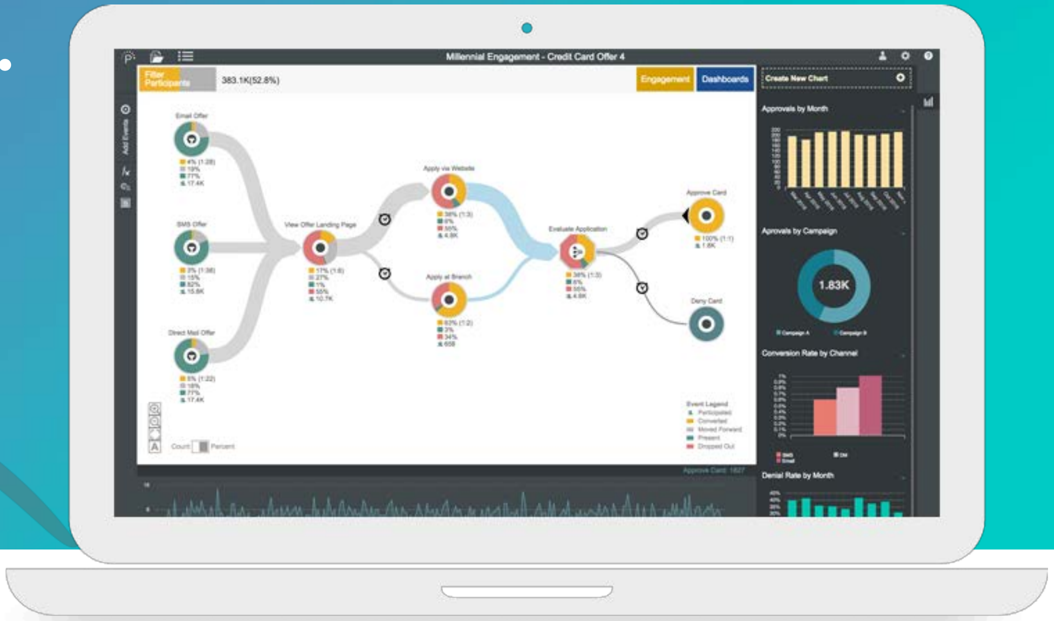
Millennial Engagement - Credit Card Offer 4
Filter Participants
383.1K(52.8%)
Engagement
Dashboards
Create New Chart
Email Offer
SMS Offer
Direct Mail Offer
View Offer Landing Page
Apply via Website
Apply at Branch
Evaluate Application
Approve Card
Deny Card
Approvals by Month
Approvals by Campaign
1.83K
Conversion Rate by Channel
Denial Rate by Month

COMCAST

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NISSAN

xfinity mobile

GameStop

Canadian Red Cross