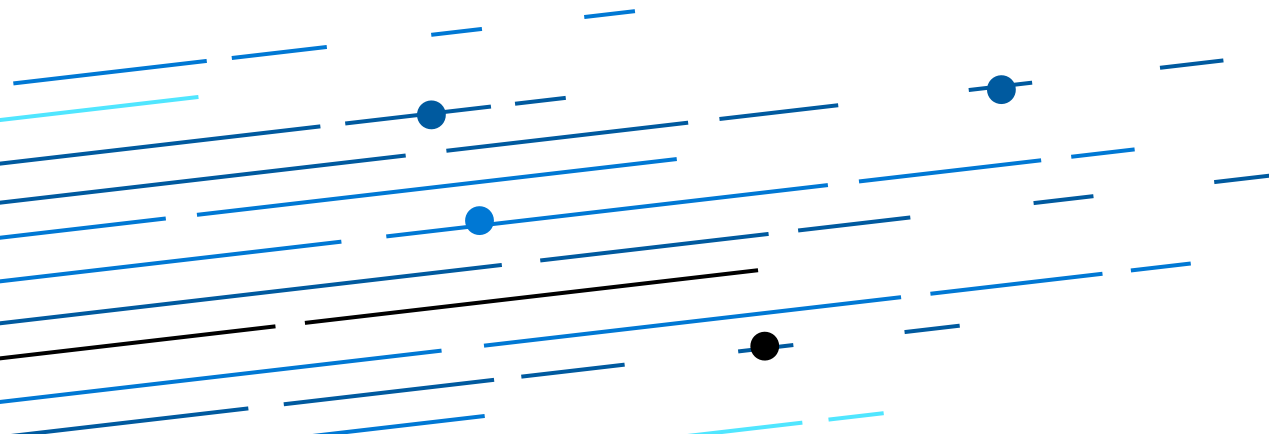


Envisioning Workshop Overview

Rudy Dillenseger, Director of Customer Engagement



Envisioning Workshop



Purpose

Define current challenges and uncover rapid solution prototyping possibilities



Audience

Business Decision Makers within our customers, aiming to “break” executives out of a fixed mindset.



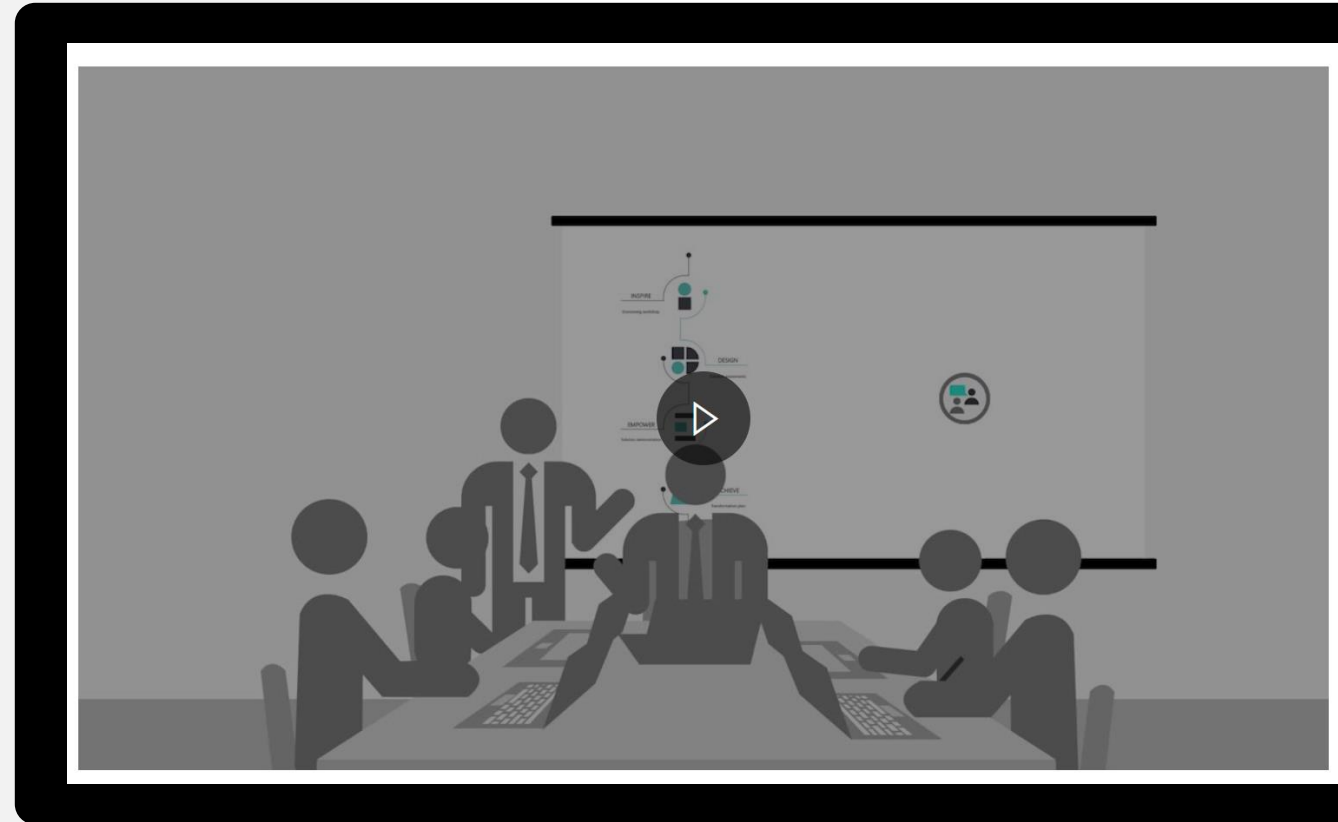
Delivery

A one-day or two-day single location gathering of stakeholders

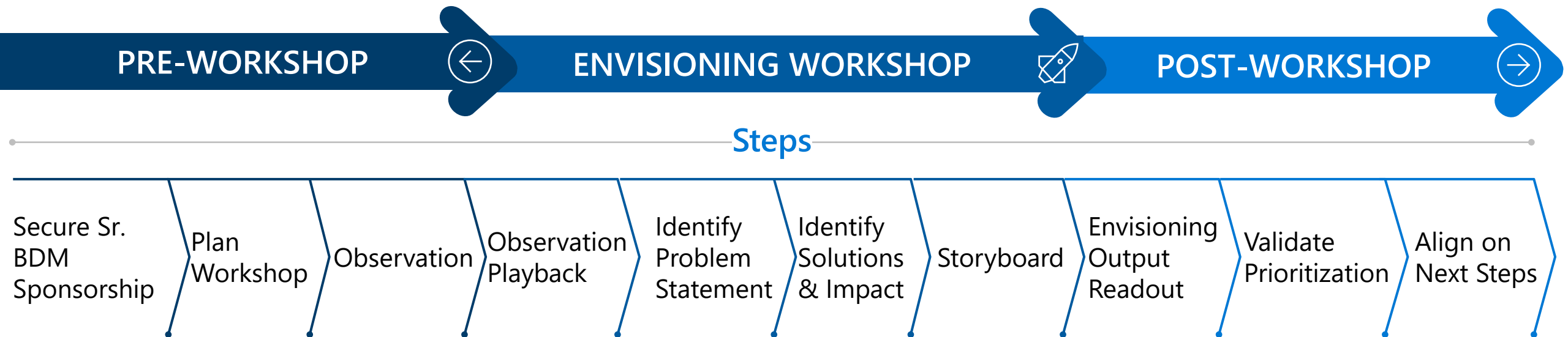


Outcome

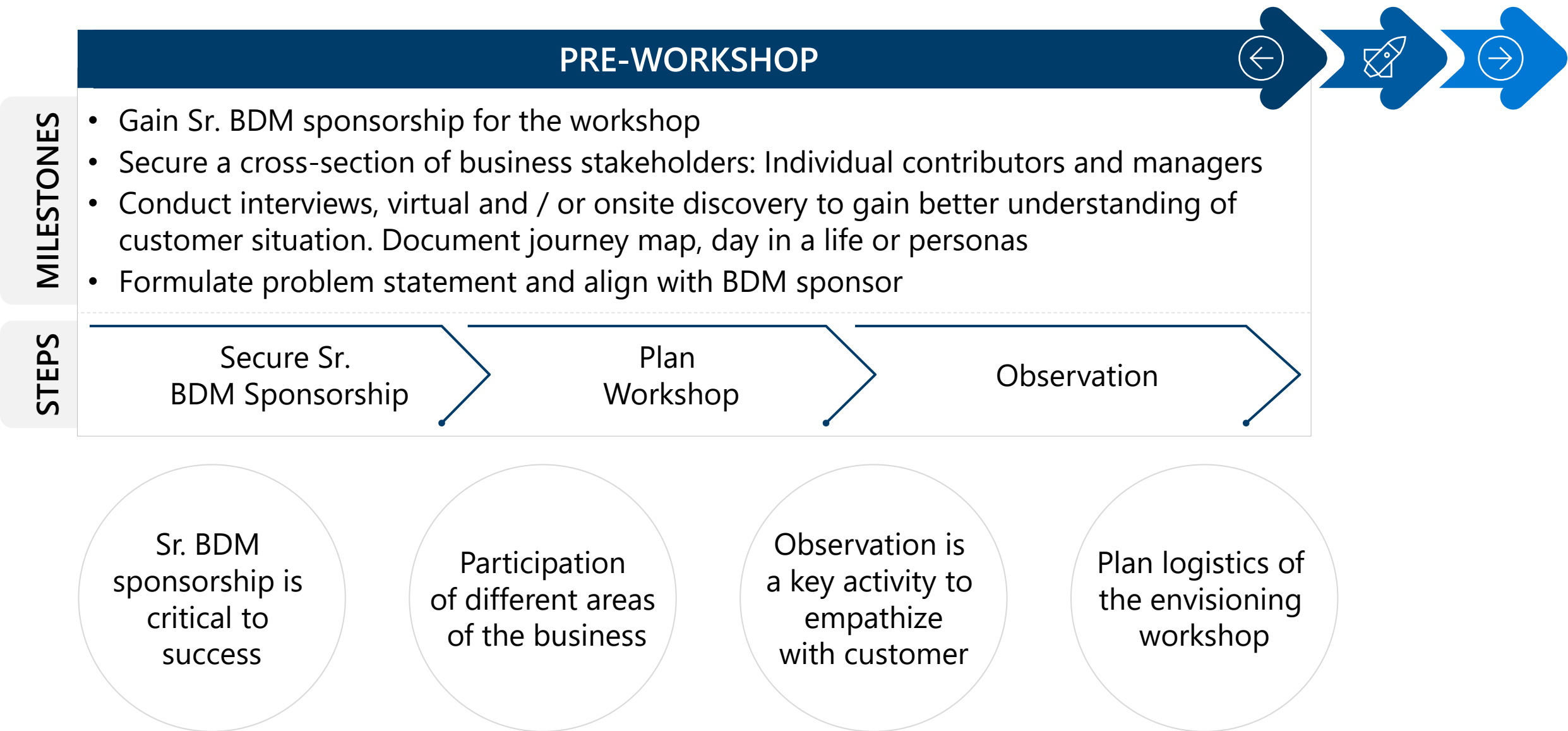
A collection of new ideas and a roadmap of next actions



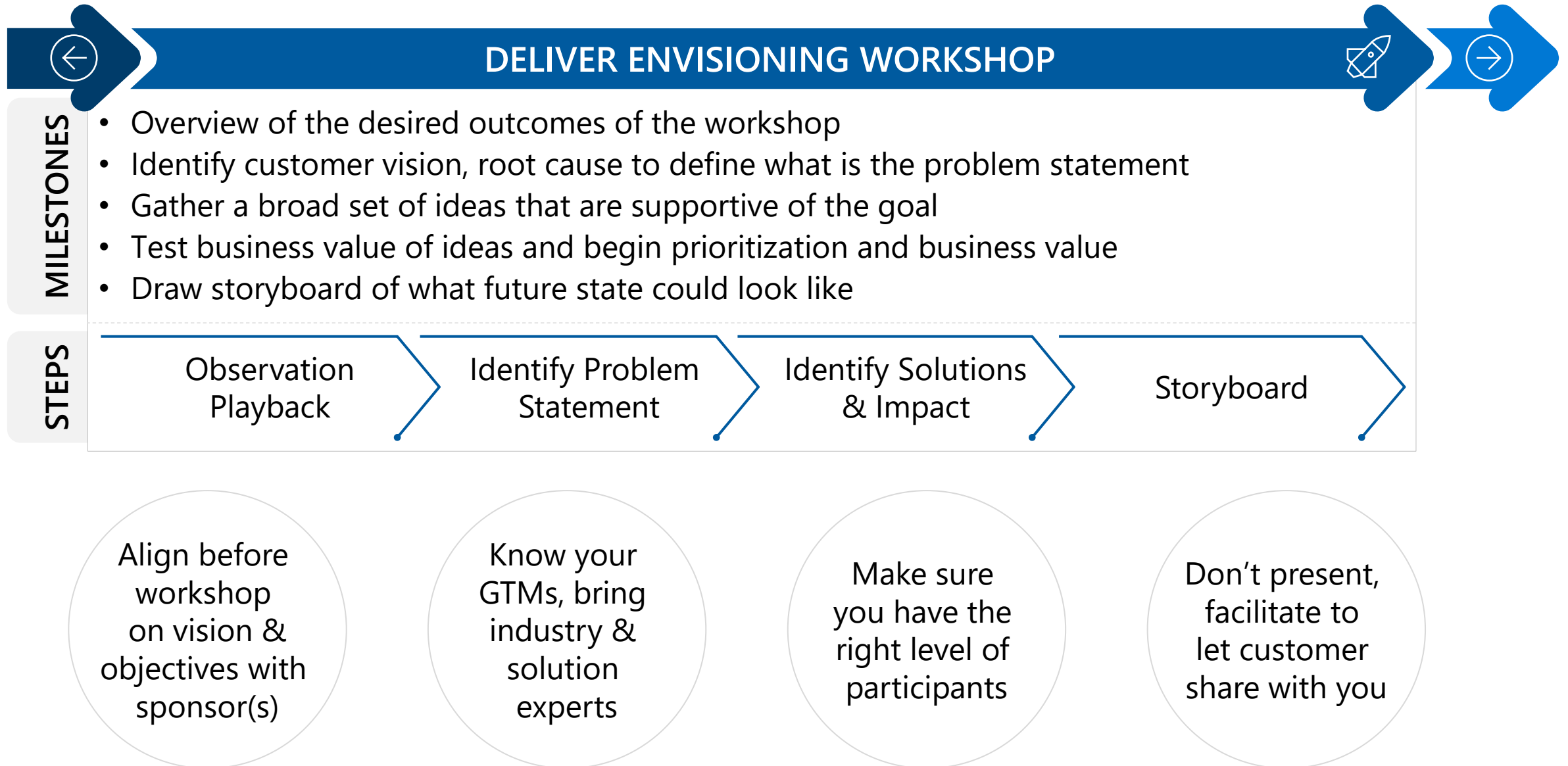
Envisioning workshop overview



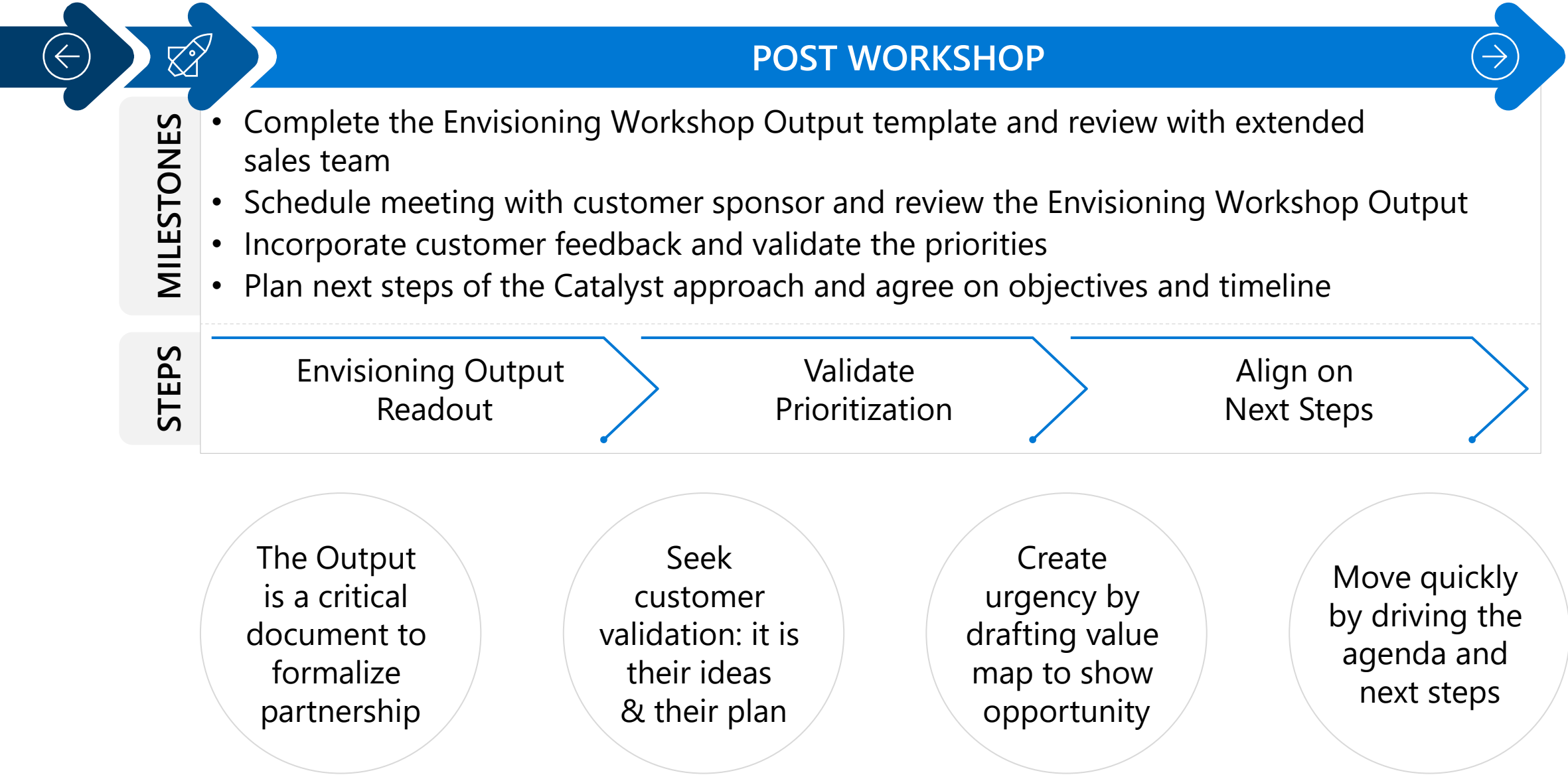
Envisioning workshop | Pre-Workshop overview



Envisioning workshop overview



Envisioning workshop overview

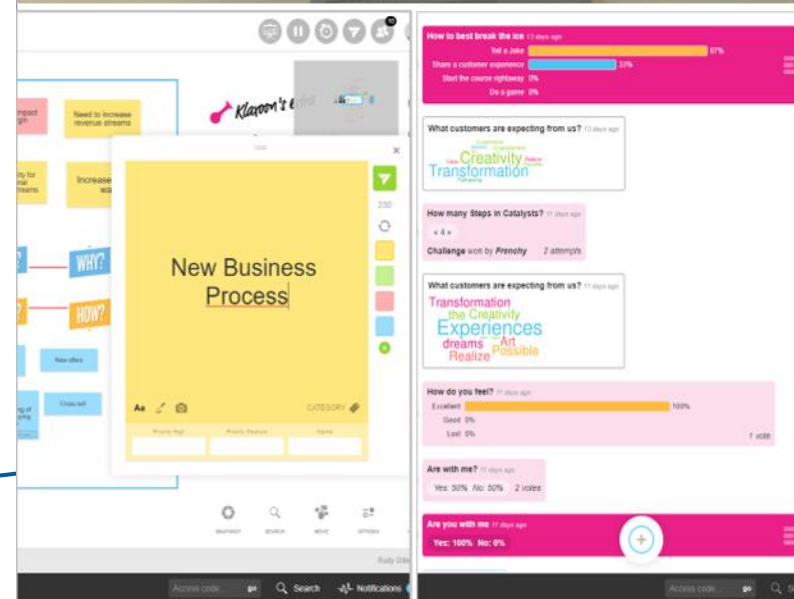


The In-Person Way



The Digital Way

Microsoft Teams + [Klaxoon](#)



Weight this topic

asked to 0 people 13 days ago



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3 votes • [change vote](#)

Example : Transform Customer Engagement (1/2)

	MARKETING	SALES BRANCHES	CALL CENTER	FIELD TECHNICIANS	CUSTOMER SERVICE
ACQUISITION	Market Planning Channel Propensity High Propensity List Purchase Lead Scoring 360 Customer Profile w/ Interaction History Forecasting Resource Budgeting AI Segmentation	Field Sales RSO Neighborhood Centric Door Hanger/ Landing Page 360 Customer Profile w/ Interaction History	360 Customer Profile w/ Interaction History	360 Customer Profile w/ Interaction History Intelligent Upsell	360 Customer Profile w/ Interaction History Intelligent Upsell
CONVERSION	Campaign Branching Multi-channel Campaign Activities Lead Scoring Real Time Campaign Perf Data Real Time Reporting Visibility and Resource Pooling	Lead Scoring QR Codes AI Image Rec Remote Assist Guided Sales Tool Automated Mobile CPO Real Time Reporting Visibility and Resource Pooling Guided 'Self Wdy' Optimized routing	Automated Mobile CPO Lead Scoring Call Scripts Property Calc w/ exception handling Real Time Reporting Visibility and Resource Pooling Next Best Action	Automated Mobile CPO	
RETENTION	Churn Propensity Input to Campaign Do Not Contact Advocacy Identification 360 Customer Profile w/ Interaction History	360 Customer Profile w/ Interaction History More knocks w/ optimized routing Automated Mobile CPO	360 Customer Profile w/ Interaction History Next Best Action	360 Customer Profile w/ Interaction History Property Health Scoring Remote Assist	360 Customer Profile w/ Interaction History Contextual Knowledge Customer Insight Churn Propensity Customer Service Insights
COST REDUCTION	Channel Optimization Reduced Disconnected Analytics Tools Application Rationalization	Application Rationalization Reduce Onboarding Time w/ Guided App Reduce Staffing w/ Optimized Routing	Application Rationalization Reduce Onboarding Time w/ Guided App	Application Rationalization Reduce Onboarding Time w/ Guided App Reduce Planner Time w/ automated FS	Application Rationalization Reduce Onboarding Time w/ Guided App Decreased AHT w/ Customer 360 Inbound Digital Channel Optimization

Example : Transform Customer Engagement (2/2)

CREATIVE MATRIX	MARKETING		SALES BRANCHES		CALL CENTER		FIELD TECHNICIANS		CUSTOMER SERVICE	
	Acquisition	Conversion	Retention	Cost Reduction	Acquisition	Conversion	Retention	Cost Reduction	Acquisition	Conversion
	Lead Generation	Lead Scoring	Lead Nurturing	Lead Conversion	Lead Generation	Lead Scoring	Lead Nurturing	Lead Conversion	Lead Generation	Lead Scoring
	Lead Scoring	Lead Nurturing	Lead Conversion	Lead Retention	Lead Scoring	Lead Nurturing	Lead Conversion	Lead Retention	Lead Scoring	Lead Nurturing
	Lead Conversion	Lead Retention	Lead Scoring	Lead Nurturing	Lead Conversion	Lead Retention	Lead Scoring	Lead Nurturing	Lead Conversion	Lead Retention



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