



## Customer Experience and Analytics Maturity Model

Microsoft  
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Gold Cloud Customer Relationship Management  
Gold Enterprise Resource Planning  
Gold Cloud Platform  
Gold Data Analytics  
Gold Data Platform

# Topics

Customer Engagement Maturity Model

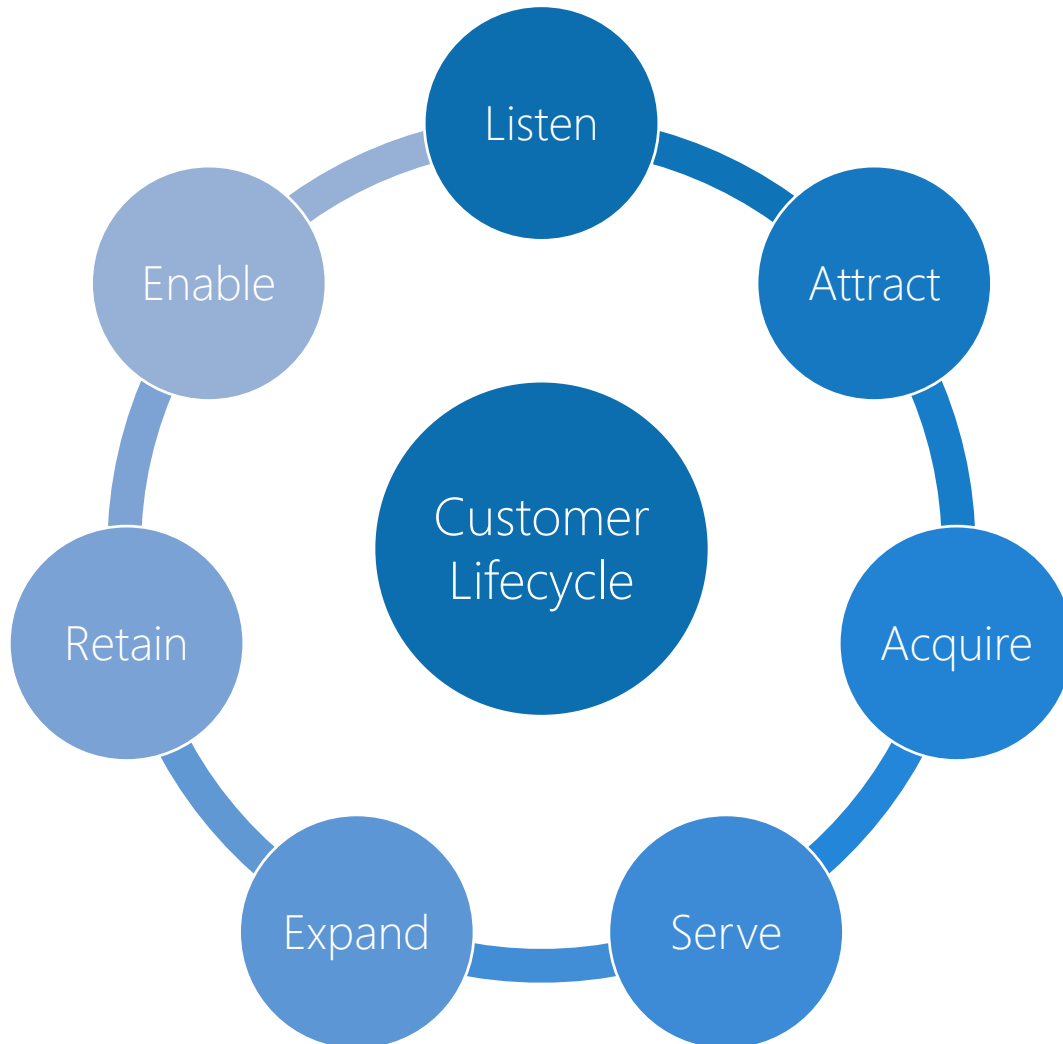
BI & Analytics Maturity Model





# Customer Engagement Maturity Model





Listen

- Build Fans, Surveys, Social Media, Email, Sentiment Analysis, NPS

Attract

- Marketing Automation, Web, Social, Email, In-Person Events

Acquire

- Lead & Opportunity management & ML Scoring, Quoting, Knowledge Base

Serve

- Service Management, Case Management, Field Service, Portals

Expand

- Marketing Automation – Web, Social, Email, Cross/Up Sell

Retain

- Surveys, Follow-ups, Touch Points, Marketing Automation

Enable

- Portals, Self Service, Reporting, Feedback



## **Engaging Customers**

We help you rethink customer engagement, build fans of your products and services and engagement through the full 360-degree customer lifecycle



## **Empower Employees**

Empowerment of employees, operational information in productivity applications, delivering engaging HR experience



## **Optimize Operations**

Rethink operational optimization, improve utilization with IoT, leverage predictive and prescriptive analytics



## **Transform Products & Services**

Rethink product and service transformation, utilize data to enter new markets, prioritize agility

## Level 1 - Interested 19% of Organizations

- Customer experience is important, but funding and upper-level support is minimal.

## Level 2 - Invested 22% of Organizations

- Customer experience is important and initial programs are being put in place -- but the effort is still not connected with profitability for the organization.

## Level 3 - Committed 11% of Organizations

- Customer experience is critical to the company and executives understand how it's connected to fundamental results: It's not customer experience for customer experience's sake.

## Level 4 - Engaged 8% of Organizations

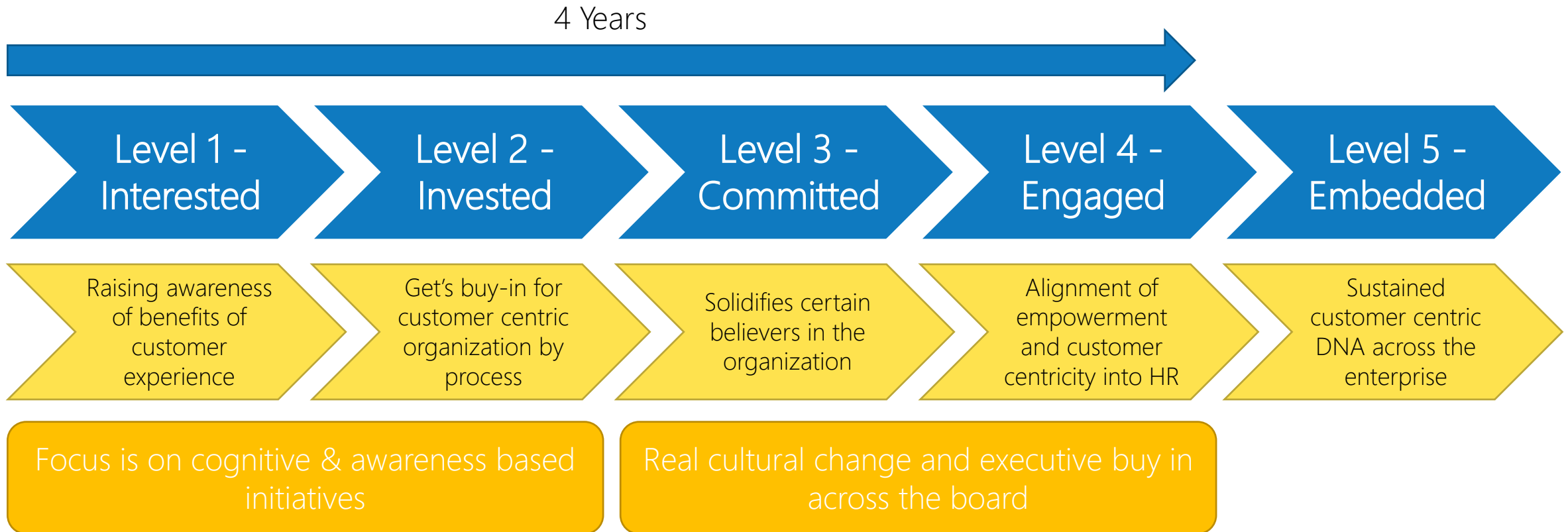
- Customer experience is a core part of the company's strategy and objectives.

## Level 5 - Embedded 4% of Organizations

- It's in the company's DNA, the essence of everything and anything the company does.

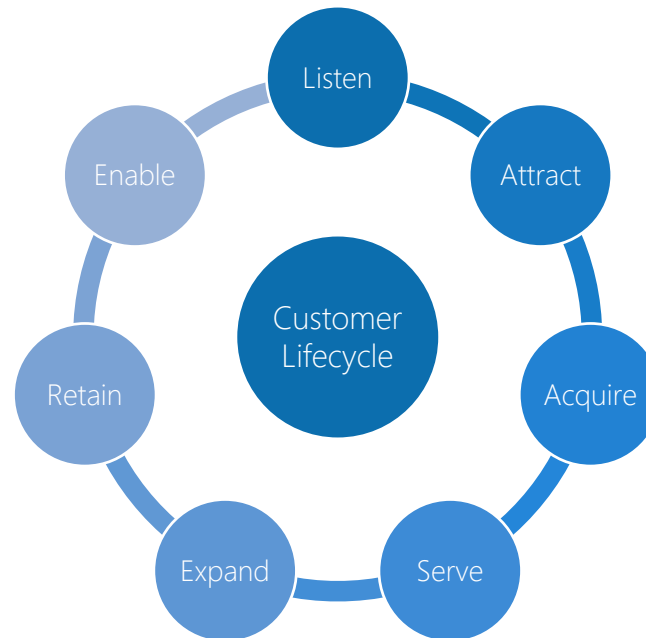
36% of  
Organizations are  
not yet at Level 1!

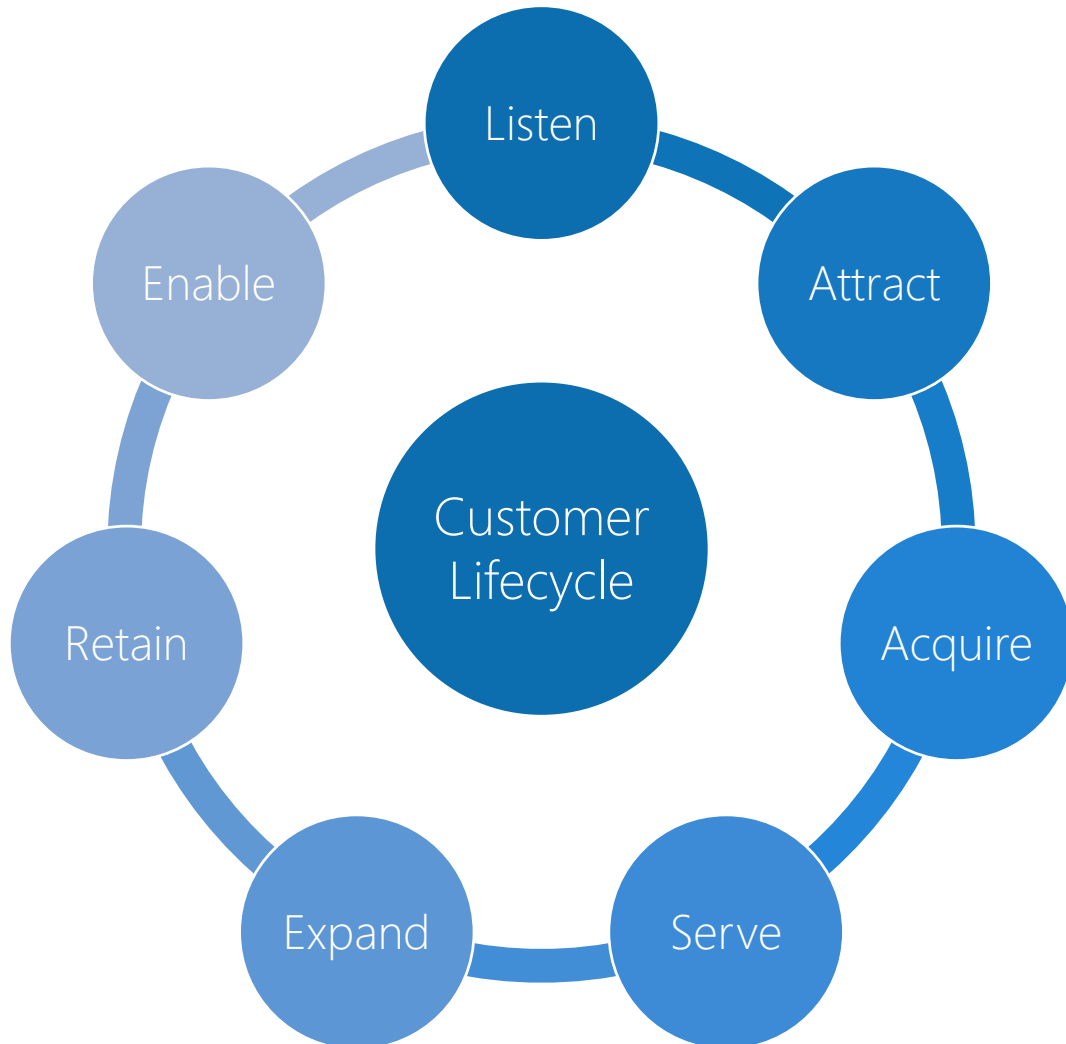
Category	Interested Level 1	Invested Level 2	Committed Level 3	Engaged Level 4	Embedded Level 5
Organizational Culture	Raising awareness of benefits of customer experience	Get's buy-in for customer centric organization by process	Solidifies certain believers in the organization	Alignment of empowerment and customer centricity into HR	Sustained customer centric DNA across the enterprise
Measurement & Analytics	Limited KPI's around customer	Starting to utilize KPI's in Listen through Serve	KPI's for specific projects and departments	KPI's driven across all levels of customer experience leading to better decisions and training need identification	KPI's linked to growth strategy, investment funding & compensation
Customer Journey Mapping	Typically focused on Listen - Attract – Acquire - Serve	Starting to look at the full lifecycle of the customer from Listen to Enable	Tailored programs for each of the lifecycles elements with the customer.	Employee behaviors mapped at each phase and automation included into processes	Fully actualized customer journey integrated across the enterprise.
VoC	Evaluate different customer listening posts	Consolidate customer experience metrics & processes for fixing problems	VoC tailored for each different organization	VoC integrated into key processes	Customer insight prevalent in very process across the enterprise
Central Customer Experience	Evangelism and collection of customer insights	Manage VoC processes, internal communication and smaller number of projejcts	Provide consultative support to and build network of customer experience advocates across the organization	Best practice sharing across the organization	Reinforcing of customer experience across the organization
Senior Leadership Role	Thinks customer experience is important	Believe customer experience is very important and add goals to their direct reports	Understand the link between customer experience and business results & willing to make significant investments	Incorporate customer experience s a core tenant of the overall business strategy	View their role as the keeper of customer-centric culture











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## VoC – Voice of Customer

“Term used in business and IT to describe the in-depth process of capturing a customer’s expectations, preferences and aversions.”

- Relationship Tracking
- Interaction Monitoring
- Continuous Listening
- Project Infusion
- Periodic Immersion

- **Capture:** It's important to identify customer listening posts both internally and externally. Surveys are the easiest and most common way to establish listening posts across all customer touch-points and departments.
- **Analyze:** After capturing key insights, you can then analyze feedback in real-time. It's important to deliver clear and actionable insight to the right employee stakeholders.
- **Act:** Successful VoC programs put you in the best position to act on real-time insight. Knowing where the problem areas are, allows you and your team to take corrective action.
- **Monitor:** Continuous monitoring helps you to track your results over time. Having a real-time pulse on your customers helps you uncover patterns to see where you are making improvements across the enterprise.





- CRM applications provide the perfect repository of all customer related information
- 360 degree view of the customer
- Empowerment of agents to act across the organization
- Easily hand-off between customer interaction points





# BI & Analytics Maturity Model



## Organization

- Organizations structure, culture, leadership, skills and funding support the analytics program.
- How widespread are analytics across the organization for daily decision making?
- Are analytics roadmaps in place guiding the delivery of analytics across the organization?

## Infrastructure

- How advanced and clear is the architecture to support analytics?
- How widespread is the architecture to support analytics?
- What technologies are in place & how mainstream vs. siloed are they?
- What involvement is there of skilled resources such as Data Scientists for insight?

## Data Management

- What types of structured and unstructured data are required and how widespread are they?
- What is the frequency requirements for the data?
- How do you support the analytics from a data management perspective?
- What data quality & integration initiatives are in place to support the data?
- How are integrations supported from multiple sources?

## Analytics

- What is the scope of analytics that are used today?
- How widespread is analytics based decision making across the organizations culture?
- What is the consistency and method of delivery of the analytics?
- How integrated are analytics into your LOB applications?
- What types of analytics are in place from descriptive to prescriptive?

## Governance

- How clear is the companies data governance initiatives and who in the organization is involved?
- How restrictive are the companies policies for self discovery to arrive at insights?
- What security policies are in place around data access and availability?

Category	Ad-Hoc Level 1	Siloed Level 2	Tactical Level 3	Strategic Level 4	Pervasive Level 5
Org Structure	<ul style="list-style-type: none"> <li>Unaware of Analytics Power for Decision Making</li> <li>IT not involved in assisting business with analytics unless it's under their control</li> </ul>	<ul style="list-style-type: none"> <li>Heroic efforts by individuals in analytic based decision making</li> <li>Silos of analytics happening independently</li> <li>Analytics discussions starting – some level of sponsorship at exec level but lack of buy-in across the organization</li> </ul>	<ul style="list-style-type: none"> <li>IT and Business starting to work together on analytics platform</li> <li>Executive sponsor recognizes IT not supporting the initiative</li> <li>Determination of business questions trying to be answered</li> </ul>	<ul style="list-style-type: none"> <li>Analytics plays big part in competitive differentiation</li> <li>Proven analytic success stories with-in the organization</li> <li>Strategy deeply rooted in analytics</li> </ul>	<ul style="list-style-type: none"> <li>Full executive buy in to analytics</li> <li>It's the cornerstone of the companies competitive analysis</li> </ul>
Org Culture	<ul style="list-style-type: none"> <li>Some individuals using spreadsheets or other Ad-Hoc Solutions</li> <li>Lack of collaboration on analytics</li> </ul>	<ul style="list-style-type: none"> <li>Heroic users leveraging analytics for decision making</li> </ul>	<ul style="list-style-type: none"> <li>Organization as a whole has not bought into analytics</li> <li>Not part of typical decision making processes</li> </ul>	<ul style="list-style-type: none"> <li>Analytics culture is the norm and growing</li> </ul>	<ul style="list-style-type: none"> <li>Analytics used for more than strategy &amp; insight</li> <li>Analytics is pervasive and people need to think out of the box</li> <li>Analytics is part of the daily life</li> </ul>
Analytics Roadmap	<ul style="list-style-type: none"> <li>Complete lack of roadmap</li> </ul>	<ul style="list-style-type: none"> <li>Individual business units have plans for their analytics while others remain with no roadmap</li> </ul>	<ul style="list-style-type: none"> <li>Team starting to be established to look at analytics scope across the enterprise</li> </ul>	<ul style="list-style-type: none"> <li>Think about how to expand use of analytics across the organization in few remaining parts of the company not utilizing it</li> </ul>	<ul style="list-style-type: none"> <li>Analytics is accessible across all devices</li> </ul>

Category	Ad-Hoc Level 1	Siloed Level 2	Tactical Level 3	Strategic Level 4	Pervasive Level 5
Development	<ul style="list-style-type: none"> <li>Individuals doing spot reporting with little to no support</li> </ul>	<ul style="list-style-type: none"> <li>Individual(s) in departments driving demand and individuals with prior skill sets utilizing analytics</li> <li>No formal training</li> </ul>	<ul style="list-style-type: none"> <li>Formal training and development being put in place</li> <li>Executive sponsorship for analytics but not wide spread</li> </ul>	<ul style="list-style-type: none"> <li>Data scientists integrating analytics in processes</li> <li>Analytics development tools and training well managed</li> <li>Executive sponsorship across key departments for analytics</li> </ul>	<ul style="list-style-type: none"> <li>Data Scientists providing incremental value in processes and interacting on results</li> <li>Executive sponsorship across enterprise</li> <li>Tools/Training well established</li> </ul>
Technologies	<ul style="list-style-type: none"> <li>No dedicated platform</li> <li>Shared data sets</li> <li>Individual spreadsheets and light Visualization tools</li> </ul>	<ul style="list-style-type: none"> <li>No dedicated platform</li> <li>Shared data sets</li> <li>Individual spreadsheets and light Visualization tools</li> </ul>	<ul style="list-style-type: none"> <li>No dedicated platform</li> <li>Cloud infrastructure being considered</li> <li>Hadoop being evaluated for flexibility</li> </ul>	<ul style="list-style-type: none"> <li>Many technologies in place including non-sql, Hadoop and DW's</li> <li>Some hybrid analytics between cloud and on premise</li> <li>Standardized analytical tools across enterprise</li> </ul>	<ul style="list-style-type: none"> <li>More cloud technology for advanced analytics</li> <li>Mobility utilized with analytics</li> </ul>
Architecture	<ul style="list-style-type: none"> <li>Individually managed data sets and extracts</li> </ul>	<ul style="list-style-type: none"> <li>Department may share some basic extracts in excel</li> </ul>	<ul style="list-style-type: none"> <li>Thinking of unified architecture to access multiple data sources of structured and unstructured data</li> </ul>	<ul style="list-style-type: none"> <li>* Unified architecture</li> </ul>	<ul style="list-style-type: none"> <li>Company wide unified architecture</li> <li>Supports legacy and newer systems</li> </ul>



Category	Ad-Hoc Level 1	Siloed Level 2	Tactical Level 3	Strategic Level 4	Pervasive Level 5
Standards & Quality	<ul style="list-style-type: none"> <li>No data management strategy related to meta data and naming standards</li> </ul>	<ul style="list-style-type: none"> <li>Errors in analytics are determined due to inconsistency of measurement</li> <li>Lack of data management strategy</li> </ul>	<ul style="list-style-type: none"> <li>Still a lot of spreadsheets but now off common data source</li> <li>Data Integrity and consistency is important</li> <li>Meta data definition in siloed departments</li> <li>Management Strategy is missing</li> </ul>	<ul style="list-style-type: none"> <li>Strong Governance policy allows sharing of data in a consistent manner</li> <li>Platform, Semantic and Meta Data level mappings are in place</li> <li>Data lifecycle, auditability and lineage management is also established</li> </ul>	<ul style="list-style-type: none"> <li>Data access is managed more effectively</li> </ul>
Reach of Data	<ul style="list-style-type: none"> <li>Siloed to individuals</li> <li>Minor databases</li> </ul>	<ul style="list-style-type: none"> <li>Execs and leaders see value of combining multiple data sources</li> <li>Need is identified for infrastructure</li> <li>Disparate sources of data</li> </ul>	<ul style="list-style-type: none"> <li>Departmental based</li> <li>Lack of Governance</li> </ul>	<ul style="list-style-type: none"> <li>Analytics used for more than just BI – used for predictive, AI as well</li> <li>Company looks for more data internally and externally to enrich their data points</li> </ul>	<ul style="list-style-type: none"> <li>Prevalent across the organization and external sources</li> </ul>
Data Volume & Integration	<ul style="list-style-type: none"> <li>Low</li> <li>Disconnected</li> </ul>	<ul style="list-style-type: none"> <li>Low</li> <li>Starting to define DW / Data Mart</li> </ul>	<ul style="list-style-type: none"> <li>Establishment of DW / Data Mart – structured data</li> </ul>	<ul style="list-style-type: none"> <li>Use of many forms of data and take on new data sources easily</li> <li>Unified view of data across all data sources</li> </ul>	<ul style="list-style-type: none"> <li>High data volume and unification across departments and divisions.</li> </ul>

Category	Ad-Hoc Level 1	Siloed Level 2	Tactical Level 3	Strategic Level 4	Pervasive Level 5
Scope	<ul style="list-style-type: none"> <li>Slicing and Dicing of spreadsheets</li> <li>Departmental or LOB</li> </ul>	<ul style="list-style-type: none"> <li>Pockets of advancement are developing – Siloed in marketing, sales etc.</li> </ul>	<ul style="list-style-type: none"> <li>Pockets of BI and Predictive more advanced</li> </ul>	<ul style="list-style-type: none"> <li>Large amounts of data from across the organization</li> <li>Analytics and AI is integrated into business processes for better decision making</li> <li>Unstructured Structured, GeoSpatial data all utilized</li> </ul>	<ul style="list-style-type: none"> <li>Continued evolution of structured, unstructured, geospatial and real-time data</li> </ul>
Culture	<ul style="list-style-type: none"> <li>Siloed</li> <li>Best practices not shared</li> <li>No broad analytics culture established</li> </ul>	<ul style="list-style-type: none"> <li>Siloed</li> <li>Departments are starting to ask questions that require analytics to answer</li> <li>Heroic users assist in getting analytics started</li> <li>IT/Business need to start coming together before gets out of control</li> </ul>	<ul style="list-style-type: none"> <li>Key users drive adoption of analytics and predictive tools based on past history</li> <li>3<sup>rd</sup> party consultants assisting with analytics</li> </ul>	<ul style="list-style-type: none"> <li>CoE around analytics</li> <li>In house Data Scientists</li> <li>Training other groups on analytics</li> </ul>	<ul style="list-style-type: none"> <li>Continually looking for ways to advance analytics</li> <li>CoE is working to delivery more advanced analytics and machine learning into the business</li> <li>Joint business and IT team to advanced analytics quickly</li> </ul>
Delivery	<ul style="list-style-type: none"> <li>Spreadsheet is the main tool</li> <li>Heavy manual merging of data from multiple sources</li> </ul>	<ul style="list-style-type: none"> <li>Low cost visualization tools being used by certain departments</li> </ul>	<ul style="list-style-type: none"> <li>Pockets of BI, Data Discovery and Analytics Tools</li> </ul>	<ul style="list-style-type: none"> <li>Across multiple sources and business processes</li> </ul>	<ul style="list-style-type: none"> <li>CoE works to delivery across the enterprise</li> </ul>
Analytics	<ul style="list-style-type: none"> <li>Reporting</li> </ul>	<ul style="list-style-type: none"> <li>Reporting, Analysis, Monitoring</li> </ul>	<ul style="list-style-type: none"> <li>Reporting, Analysis, Monitoring, Forecasting</li> </ul>	<ul style="list-style-type: none"> <li>Reporting, Analysis, Monitoring, Forecasting, Predictive</li> </ul>	<ul style="list-style-type: none"> <li>Reporting, Analysis, Monitoring, Forecasting, Predictive, Prescriptive</li> </ul>

# Levels of Maturity Across Analytics Governance

Category	Ad-Hoc Level 1	Siloed Level 2	Tactical Level 3	Strategic Level 4	Pervasive Level 5
Policies	<ul style="list-style-type: none"> <li>N/A</li> </ul>	<ul style="list-style-type: none"> <li>No official policies</li> </ul>	<ul style="list-style-type: none"> <li>Departmental level policies</li> </ul>	<ul style="list-style-type: none"> <li>Understanding that without company level governance analytics can be a liability</li> </ul>	<ul style="list-style-type: none"> <li>Policies in place to define changes to corporate meta data, change management</li> </ul>
Structure	<ul style="list-style-type: none"> <li>N/A</li> </ul>	<ul style="list-style-type: none"> <li>Structure is department level – individuals – no formalized process</li> </ul>	<ul style="list-style-type: none"> <li>May have steering committee established working with departments on governance but most likely departmental governance taking place</li> <li>IT often leading</li> </ul>	<ul style="list-style-type: none"> <li>PMO guidance on governance involving business and IT departments</li> <li>Roles around who owns the data, where is data going, how long will it survive, etc.</li> <li>Defined data strategy</li> </ul>	<ul style="list-style-type: none"> <li>PMO oversight on governance involving business and IT departments</li> <li>Roles around who owns the data, where is data going, how long will it survive, etc.</li> <li>Defined data strategy</li> </ul>
Compliance	<ul style="list-style-type: none"> <li>N/A</li> </ul>	<ul style="list-style-type: none"> <li>Departmental compliance standards</li> </ul>	<ul style="list-style-type: none"> <li>Departmental level compliance standards</li> </ul>	<ul style="list-style-type: none"> <li>Active monitoring of analytics policies and auditing taking place but not at the expense of advancement with analytics</li> </ul>	<ul style="list-style-type: none"> <li>Active monitoring of analytics policies and auditing taking place but not at the expense of advancement with analytics</li> </ul>
Stewardship	<ul style="list-style-type: none"> <li>N/A</li> </ul>	<ul style="list-style-type: none"> <li>No formalize stewardship</li> <li>Data definitions at departmental level</li> </ul>	<ul style="list-style-type: none"> <li>No formalize stewardship</li> <li>Data definitions at departmental level and some light integration between departments for common threads such as master data systems of record</li> </ul>	<ul style="list-style-type: none"> <li>Metadata is well established and data ownership</li> <li>Budgeting and Planning part of the governance process</li> </ul>	<ul style="list-style-type: none"> <li>Metadata is well established and data ownership</li> <li>Budgeting and Planning part of the governance process</li> <li>Solid integration between business and analytics resources at all levels to advance quickly</li> </ul>
Security	<ul style="list-style-type: none"> <li>N/A</li> </ul>	<ul style="list-style-type: none"> <li>Minor security concerns and done through limiting number of users</li> </ul>	<ul style="list-style-type: none"> <li>Minor security concerns and done through limiting number of users</li> </ul>	<ul style="list-style-type: none"> <li>Balance security, policy with needs for analytics</li> </ul>	<ul style="list-style-type: none"> <li>Security and Auditability integrated with policies</li> <li>All users have access to appropriate data</li> </ul>

- **Level 1: Ad-Hoc**
  - Total Lack of Awareness
  - Spreadsheet and Information Anarchy
  - One-off Report Requests
  - **What to do:**
    - Identify the business drivers
    - Get commitment and resources
    - Understand the data sources, data quality, architecture and systems
- **Level 2: Siloed**
  - No Business Sponsor, IT executive in charge
  - Limited Users - mainly managers and executives
  - Data Inconsistency and stovepipe systems
  - **What to do:**
    - Get funding for finance related BI initiatives from senior executives
    - Define metrics to analyze specific departmental or functional performances
    - Find out requirements for dashboards
    - Make case for BI Competency center
  - **Arbela Services / Product Offerings to Solve this**
    - Product
- **Level 3: Tactical**
  - Funding from business units on a project-by-project basis
  - Specific set of users is realizing value
  - Successful focus on a specific business need
  - BI Competency Center in place
- **What to do:**
  - Increase BI initiative scope across multiple departments
  - Find BI investment and commitment for non-financial data such as sales and product
  - Look for integrating the data and consolidate disparate analytic applications
  - Create an enterprise wide metrics framework
  - Expand the user base
- **Level 4: Strategic**
  - Establish a balanced portfolio of standards
  - Business objectives drive BI and performance management systems
  - Deploy an Enterprise metrics framework
  - Governance policies are defined and enforced
  - **What to do:**
    - Look to extend the BI application to supplies, customers and business partners
    - Determine how to use BI to support evolving business objectives and strategy
    - BICC should look at integrating BI Analytics with the business processes
- **Level 5: Pervasive**
  - Use of BI is extended to suppliers and customers
  - Analytics are inserted into and around the business processes
  - Information is trusted across the company

A woman with short dark hair and glasses, wearing a white blazer, is looking at a laptop. A man with curly hair, wearing a blue shirt, is gesturing with his hands while talking to her. They are in an office setting with shelves in the background.

# THANK YOU



arbelatech



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