XXXX Value Map

(Home Buyer)

CRM Salesforce : Customer Value Map

XXXXX Home Buyer Value Map – Objectives

INCREASE HOMEBUYING

IMPROVE CUSTOMER OUTCOMES

DECREASE COSTS

OBJECTIVES

Provide a 360 view of customer experience for all XXXXX Division Customers and Associates.

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XXXX Home Buyer Value Map – Goals

INCREASE HOMEBUYING

IMPROVE CUSTOMER OUTCOMES

DECREASE COSTS

ATTRACT
How might we grow our Customer visits?

SERVE
How might we improve our customer experience?

ENGAGE
How might we increase operational efficiencies?

INNOVATE
How might we mitigate business risk?

(TBD) Financial goals that align to the objectives & may correspond to one or more business units.

GOALS

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XXXX Home Buyer Value Map – Buyers

INCREASE HOMEBUYING

DECREASE COSTS

IMPROVE CUSTOMER OUTCOMES

Home Buyers

ATTRACT

How might we grow our Customer visits?

SERVE

How might we improve our customer experience?

ENGAGE

How might we increase operational efficiencies?

INNOVATE

How might we mitigate business risk?

HOME BUYERS

XXXXX

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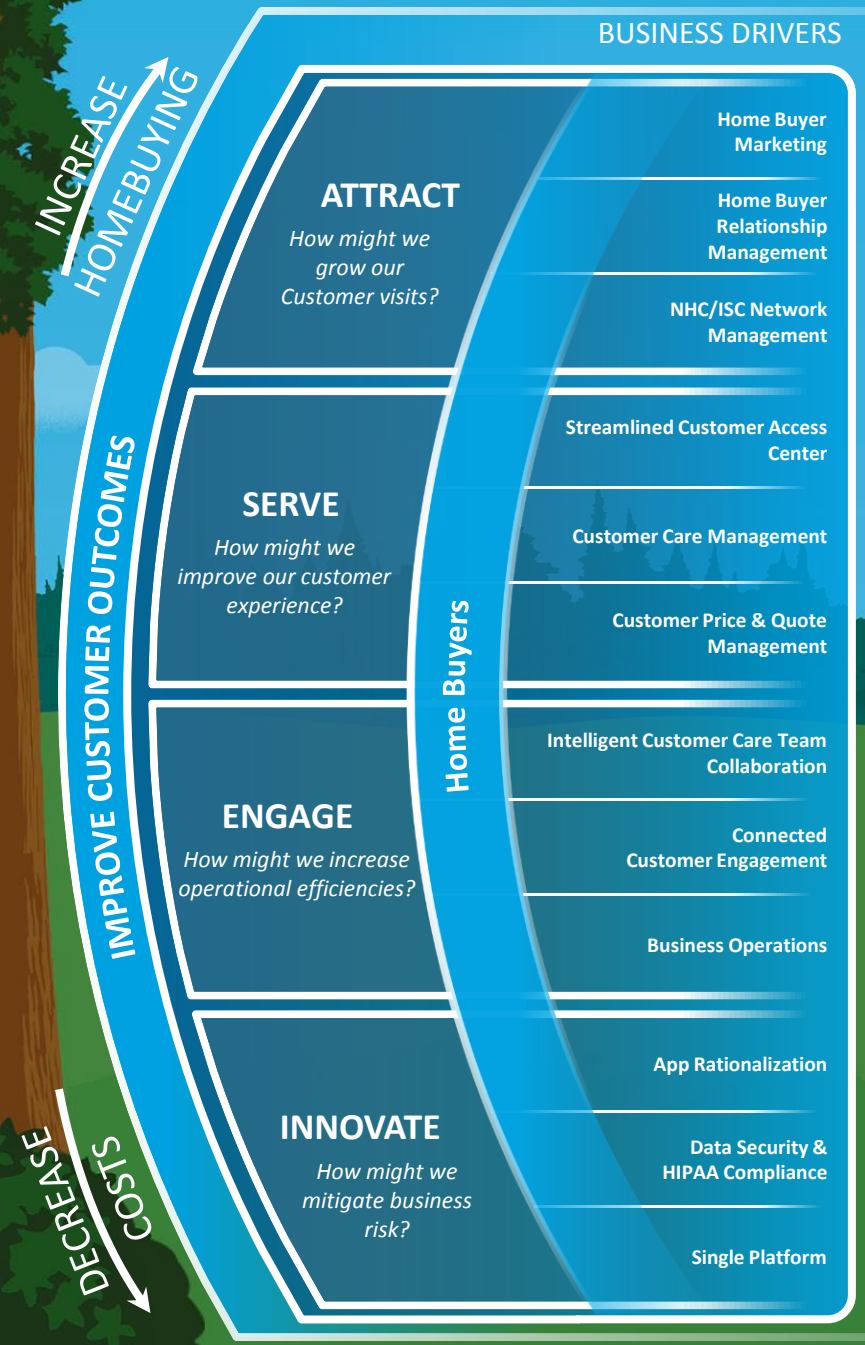
XXXX Home Buyer Value Map – Drivers



XXXX Home Buyer Value Map

INCREASE HOMEBUYING

IMPROVE CUSTOMER OUTCOMES

DECREASE COSTS

Home Buyers

BUSINESS DRIVERS	SOLUTIONS	
ATTRACT *How might we grow our Customer visits?*	**Home Buyer Marketing**	Create personalized connections with homebuyers across channels, driving increased attainment of the most valuable home buyers
	Home Buyer Relationship Management	Enable ISCs/NHCs to nurture homebuyer relationships and actively manage home buyer purchase pipeline and referral.
	NHC/ISC Network Management	Manage the end-to-end ISC/NHC journey for your Sales ecosystem from recruiting to onboarding to execution, increasing network strength and engagement.
SERVE *How might we improve our customer experience?*	**Streamlined Customer Access Center**	Equip customer care center agents with relevant homebuyer information and knowledge articles in a single console, enabling speed of call resolution and increased homebuyer satisfaction
	Customer Care Management	Provide an engagement platform for customer care coordinators to follow up with homebuyers, ensuring homebuyer satisfaction to customer care leading to better outcomes and reducing homebuyer re-work.
	Customer Price & Quote Management	Streamline purchase contracts, discounting and approvals in less time consistently across divisions
ENGAGE *How might we increase operational efficiencies?*	**Intelligent Customer Care Team Collaboration**	Drive effortless coordination and increased efficiencies with a holistic view of homebuyers available to relevant all teams.
	Connected Customer Engagement	Provide homebuyer with easy, consistent access to services and engage them on their preferred channel (traditional or social), creating increased homebuyer satisfaction and loyalty.
	Business Operations	Improve management of all aspects of the business, including employees, assets, vendors
INNOVATE *How might we mitigate business risk?*	**App Rationalization**	Allow IT to deliver high-performing business applications in less time with an agile and scalable platform
	Data Security	Equip users with configurable tools and built-in security safeguards to satisfy XXXX compliance
	Single Platform	Leverage data and insights from across lines of business on a single CRM platform

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XXXX Home Buyer Value Map -- Solutions

INCREASE HOMEBUYING

IMPROVE CUSTOMER OUTCOMES

DECREASE COSTS

Home Buyers

DELIVER A CONNECTED HOMEBUYER EXPERIENCE

BUSINESS DRIVERS	SOLUTIONS		BUSINESS IMPACT (KPIs)
ATTRACT *How might we grow our Customer visits?*			
	Home Buyer Marketing	Create personalized connections with homebuyers across channels, driving increased attainment of the most valuable home buyers	▲ New Homebuyer Acquisition ▲ Brand Management ▲ Marketing Productivity & ROI ▲ Homebuyer Lifetime Value
	Home Buyer Relationship Management	Enable ISCs/NHCs to nurture homebuyer relationships and actively manage home buyer purchase pipeline and referral.	▲ Referral Volume/Quality ▲ Liaison Productivity ▲ Customer Conversion ▲ Service Line Utilization
	NHC/ISC Network Management	Manage the end-to-end ISC/NHC journey for your Sales ecosystem from recruiting to onboarding to execution, increasing network strength and engagement.	▲ # of ISCs/NHCs ▲ ISC/NHC Engagement ▲ Retention of Top Talent ▲ Administrative Productivity
SERVE *How might we improve our customer experience?*			
	Streamlined Customer Access Center	Equip customer care center agents with relevant homebuyer information and knowledge articles in a single console, enabling speed of call resolution and increased homebuyer satisfaction	▼ Call Handle Time ▼ Onboarding Time ▲ Customer Care Capacity ▲ Homebuyer Satisfaction
	Customer Care Management	Provide an engagement platform for customer care coordinators to follow up with homebuyers, ensuring homebuyer satisfaction to customer care leading to better outcomes and reducing homebuyer re-work.	▼ Avoidable Customer Rework ▲ Homebuyer Retention/Referral ▲ First-time Outcomes
	Customer Price & Quote Management	Streamline purchase contracts, discounting and approvals in less time consistently across divisions	▲ Home buying Outcomes ▲ Business Productivity ▼ Contract Risks
ENGAGE *How might we increase operational efficiencies?*			
	Intelligent Customer Care Team Collaboration	Drive effortless coordination and increased efficiencies with a holistic view of homebuyers available to relevant all teams.	▲ Homebuyer Experience ▲ Resource Optimization ▲ Ease Of Outcomes Reporting ▼ Manual Errors & Duplication
	Connected Customer Engagement	Provide homebuyer with easy, consistent access to services and engage them on their preferred channel (traditional or social), creating increased homebuyer satisfaction and loyalty.	▲ Homebuyer ease of access ▼ Emergency Response ▼ Homebuyer cancellation Rate ▼ Rescheduling Costs
	Business Operations	Improve management of all aspects of the business, including employees, assets, vendors	▼ Operating Costs & Risk ▼ Maintenance Costs ▲ Employee Productivity, Engagement & Retention
INNOVATE *How might we mitigate business risk?*			
	App Rationalization	Allow IT to deliver high-performing business applications in less time with an agile and scalable platform	▲ IT Productivity ▲ Mobile App Utilization ▼ Total Cost of Ownership ▼ Legacy System Spend
	Data Security	Equip users with configurable tools and built-in security safeguards to satisfy XXXX compliance	▼ Digital Vulnerability ▲ Audit Efficiency ▲ Operational Stability
	Single Platform	Leverage data and insights from across lines of business on a single CRM platform	▲ Speed to Data-Driven Insights ▲ Cross-Org Collaboration ▲ Staff Productivity & Impact ▲ Ease of Business Coordination

XXXX Home Buyer Value Map – Business Impact

INCREASE HOMEBUYING

DECREASE COSTS

Home Buyers

DELIVER A CONNECTED HOMEBUYER EXPERIENCE

	BUSINESS DRIVERS	SOLUTIONS	WORKSTREAMS	BUSINESS IMPACT (KPIs)
ATTRACT *How might we grow our Customer visits?*	**Home Buyer Marketing**	Create personalized connections with homebuyers across channels, driving increased attainment of the most valuable home buyers	• Marketing Cloud • Pardot • Social Studio • Ad Studio	▲ New Homebuyer Acquisition ▲ Brand Management ▲ Marketing Productivity & ROI ▲ Homebuyer Lifetime Value
	Home Buyer Relationship Management	Enable ISCs/NHCs to nurture homebuyer relationships and actively manage home buyer purchase pipeline and referral.	• Pardot • Sales Cloud • Customer Community	▲ Referral Volume/Quality ▲ Liaison Productivity ▲ Customer Conversion ▲ Service Line Utilization
	NHC/ISC Network Management	Manage the end-to-end ISC/NHC journey for your Sales ecosystem from recruiting to onboarding to execution, increasing network strength and engagement.	• Sales Cloud • Marketing Cloud • Employee Community	▲ # of ISCs/NHCs ▲ ISC/NHC Engagement ▲ Retention of Top Talent ▲ Administrative Productivity
SERVE *How might we improve our customer experience?*	**Streamlined Customer Access Center**	Equip customer care center agents with relevant homebuyer information and knowledge articles in a single console, enabling speed of call resolution and increased homebuyer satisfaction	• Service Cloud • Live Message, Live Agent • SOS, Omni-Channel • Knowledge Base	▼ Call Handle Time ▼ Onboarding Time ▲ Customer Care Capacity ▲ Homebuyer Satisfaction
	Customer Care Management	Provide an engagement platform for customer care coordinators to follow up with homebuyers, ensuring homebuyer satisfaction to customer care leading to better outcomes and reducing homebuyer re-work.	• Service Cloud • Marketing Cloud • Field Service Lightning	▼ Avoidable Customer Rework ▲ Homebuyer Retention/Referral ▲ First-time Outcomes
	Customer Price & Quote Management	Streamline purchase contracts, discounting and approvals in less time consistently across divisions	• Steelbrick • Platform • JDE Edwards	▲ Home buying Outcomes ▲ Business Productivity ▼ Contract Risks
ENGAGE *How might we increase operational efficiencies?*	**Intelligent Customer Care Team Collaboration**	Drive effortless coordination and increased efficiencies with a holistic view of homebuyers available to all relevant teams.	• Service Cloud • Platform • Employee Community	▲ Homebuyer Experience ▲ Resource Optimization ▲ Ease Of Outcomes Reporting ▼ Manual Errors & Duplication
	Connected Customer Engagement	Provide homebuyer with easy, consistent access to services and engage them on their preferred channel (traditional or social), creating increased homebuyer satisfaction and loyalty.	• Customer Community • Marketing Cloud • Platform • Heroku	▲ Homebuyer ease of access ▼ Emergency Response ▼ Homebuyer cancellation Rate ▼ Rescheduling Costs
	Business Operations	Improve management of all aspects of the business, including employees, assets, vendors	• Communities • Platform/Mobile • Service Cloud • IoT Cloud	▼ Operating Costs & Risk ▼ Maintenance Costs ▲ Employee Productivity, Engagement & Retention
INNOVATE *How might we mitigate business risk?*	**App Rationalization**	Allow IT to deliver high-performing business applications in less time with an agile and scalable platform	• Platform • Heroku • Salesforce1 Mobile • Sandbox	▲ IT Productivity ▲ Mobile App Utilization ▼ Total Cost of Ownership ▼ Legacy System Spend
	Data Security	Equip users with configurable tools and built-in security safeguards to satisfy XXXX compliance	• Shield • Field Audit Trail • Event Monitoring • Platform Encryption	▼ Digital Vulnerability ▲ Audit Efficiency ▲ Operational Stability
	Single Platform	Leverage data and insights from across lines of business on a single CRM platform	• Platform • Heroku • Einstein Analytics	▲ Speed to Data-Driven Insights ▲ Cross-Org Collaboration ▲ Staff Productivity & Impact ▲ Ease of Business Coordination

Thank You
CUSTOMER
SUCCESS

Vision

Vision / Mission / Measure/ Levers

VISION	Provide world class customer experience based on innovation capability and operational excellence that exceeds market standards.			
MISSION	Improve home buying based on the best customer experience in the market			
STRATEGY	Invest in skills, processes and technology to continuously improve customer experience, flexibility and efficiency through the reality of multichannel approach and 360 vision			
COMMERCIAL LEVERS	**Improve Operational Efficiency**	**Facilitate the customer experience**	**Increase value**	**Improve profitability**
MEASURES OF SUCCESS	• Reduce the average care time • Reduce escalations / rework	• Increase Self-care • Increase the satisfaction rate	• Increase the % Premium • Increase Options • Improve retention	• Improve market share • Decrease operational costs • Increase the bottom-line
STRATEGIC LEVERS	• Improvement Knowledge base / Articles (Content and Agility) • Skill Management Lifts / Ideation • SF1 • Visibility Customer / Lightning • Employee Retention	• Improvement Knowledge Self-care / Diagnosis • SMS ,Emails ,Console(s) • Opening IM Feed / SOS	• Home buying Opportunities • Governance	• Chatbots / AI

Business Strategy

Strategy / Business Unit…

Category	Business Drivers	YYY	???	CORP
Customer Experience	Home Buyer Marketing	✓		
Customer Experience	Home Buyer Relationship Management	✓		
Customer Experience	Connected Customer Engagement			
Employee Excellence	NHC/ISC Network Management			✓
Service Excellence	Streamlined Customer Access Center			✓
Service Excellence	Customer Care Management			✓
Service Excellence	Intelligent Customer Care Team Collaboration			✓
CPQ	Configure, Price & Quote Management	✓		
Digital Transformation	Business Operations	✓		
Digital Transformation	App Rationalization			
Security	Data Security			
Analytics	Single Platform			
Digital Transformation	Business Operations			

Enterprise Architecture Key Themes

1. Enable Configure, Price Quote (CPQ)
2. Improve marketing capability
3. Leverage enterprise across BUs
4. Migrate to strategic platforms (move off of OMCS / Oracle CRM)
5. Reduce cost of business
6. Improving customer satisfaction
7. Improve self service
8. Handling Partners