



# Digital Customer Journey Map

Final Control Digital CAT Recommendation Presentation

May 21, 2021

# Agenda

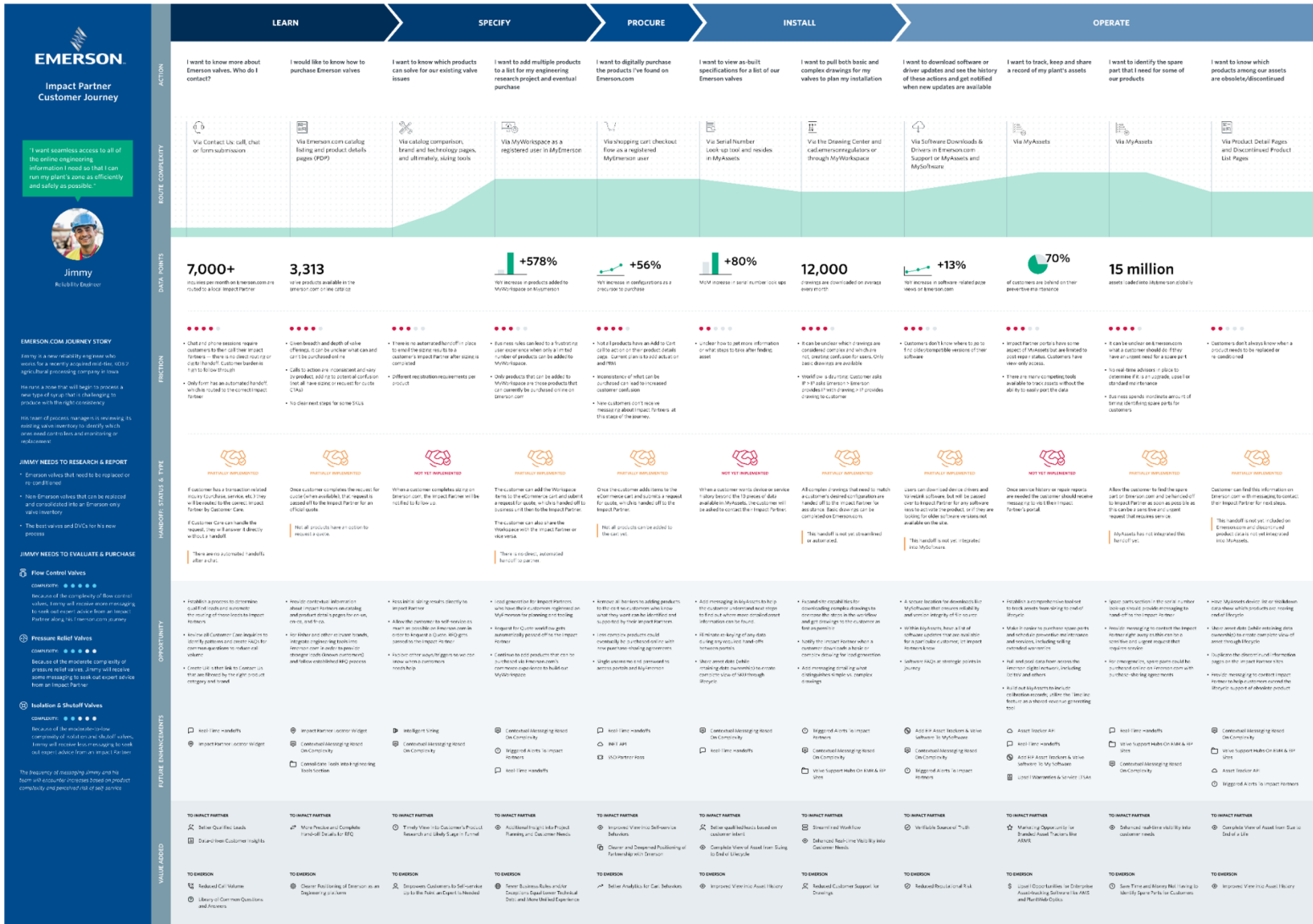
- Project Intent Statement
- Customer Journey
- Customer Journey Insights
- Themes and Activations
- Theme Activation Summary
- Next Steps

# Project Intent Statement

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Identify opportunities to provide Final Control Customers with a **seamless digital experience** that **reinforces the relationship** between Emerson and Impact Partners and **enables shared revenue growth** and **preference for Emerson products** across the digital ecosystems.

# Customer Journey

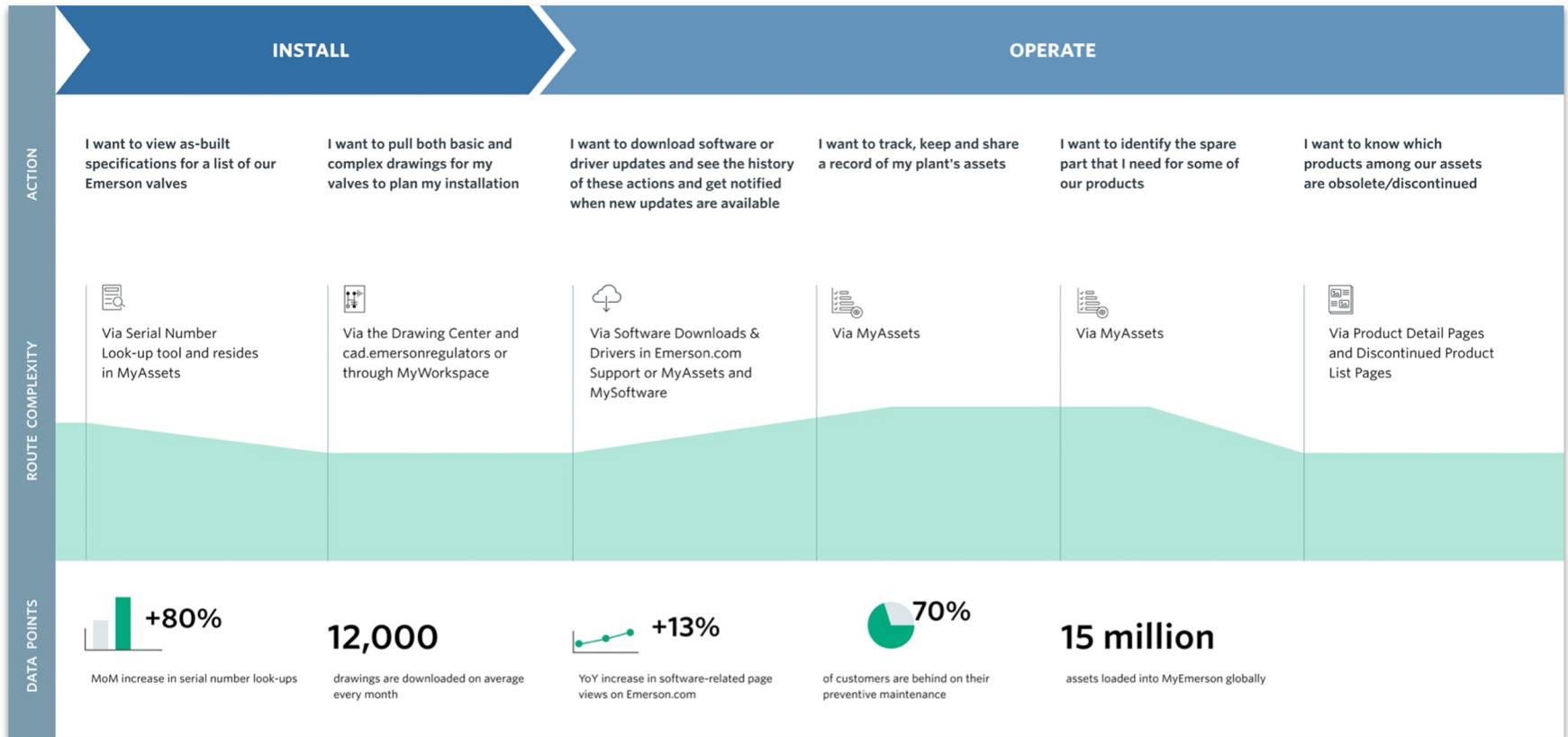




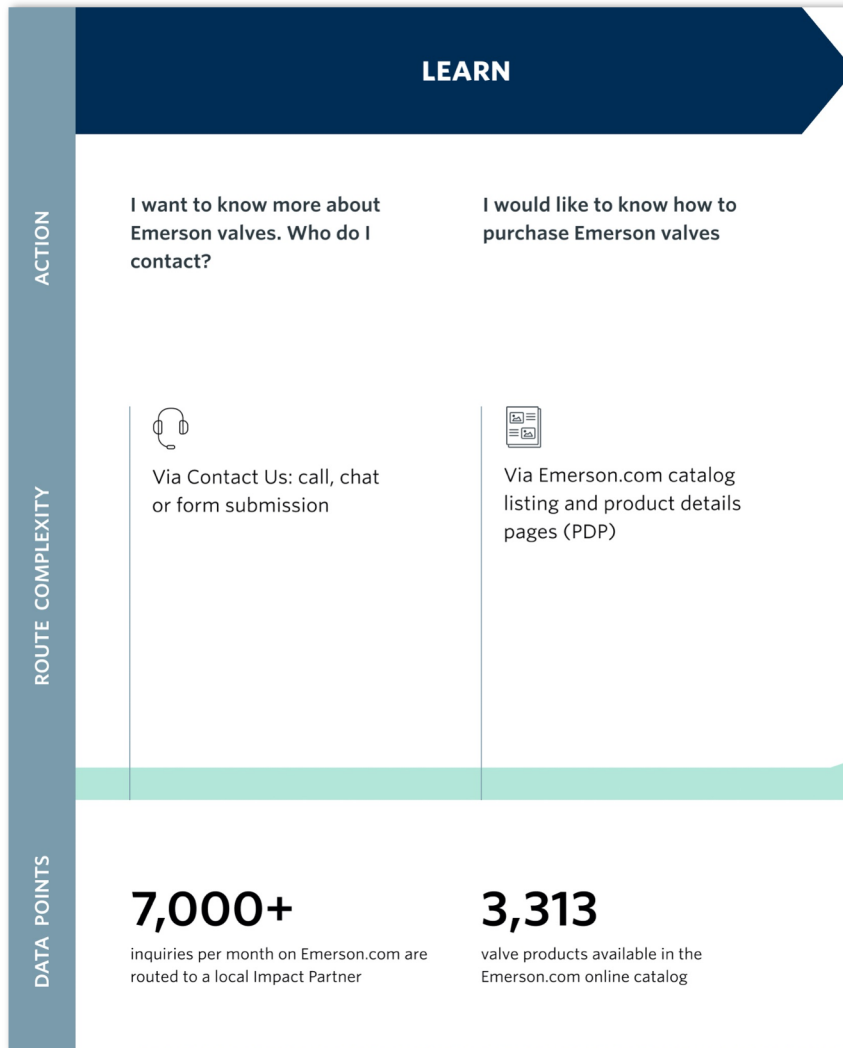
# Customer Journey



# Customer Journey



# Customer Journey—Learn Use Cases



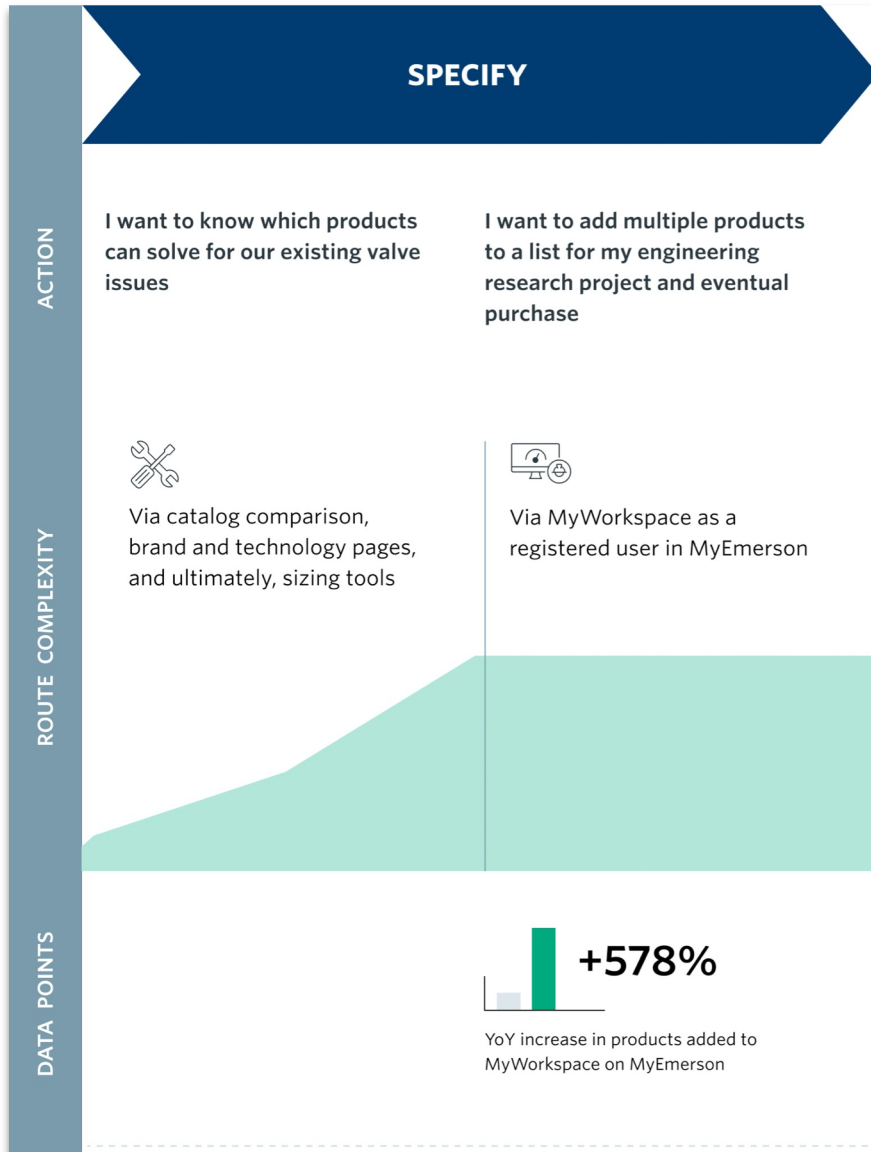
## I want to know more about Emerson valves. Who do I contact?

- Chat and phone sessions require Customers to then call their Impact Partners — there is no direct routing or digital handoff. Customer burden is high to follow through.
- Only “Contact Us” form has an automated handoff, which is routed to the correct Impact Partner.

## I would like to know how to purchase Emerson valves.

- Given breadth and depth of valve offerings, it can be unclear what can and can't be purchased online.
- Calls to action are inconsistent and vary by product, adding to potential confusion (not all have sizing or request for quote CTAs).
- No clear next steps for some SKUs.

# Customer Journey—Specify Use Cases



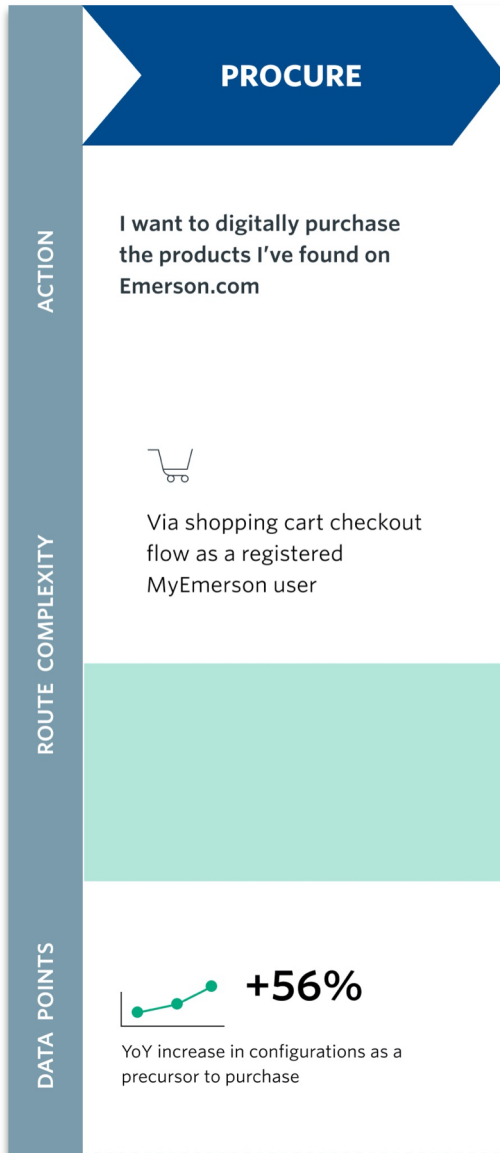
## I want to know which products can solve for our existing valve issues.

- There is no automated handoff in place to email the sizing results to a Customer's Impact Partner after sizing is completed
- Different registration requirements per product and tool
- There is no clear way to get sizing service or assistance through available "Contact Us" paths

## I want to add multiple products to a list for my engineering research project and eventual purchase.

- Business rules can lead to a frustrating user experience when only a limited number of products can be added to MyWorkspace
- Only products that can be added to MyWorkspace are those products that can be added to a cart in MyEmerson commerce

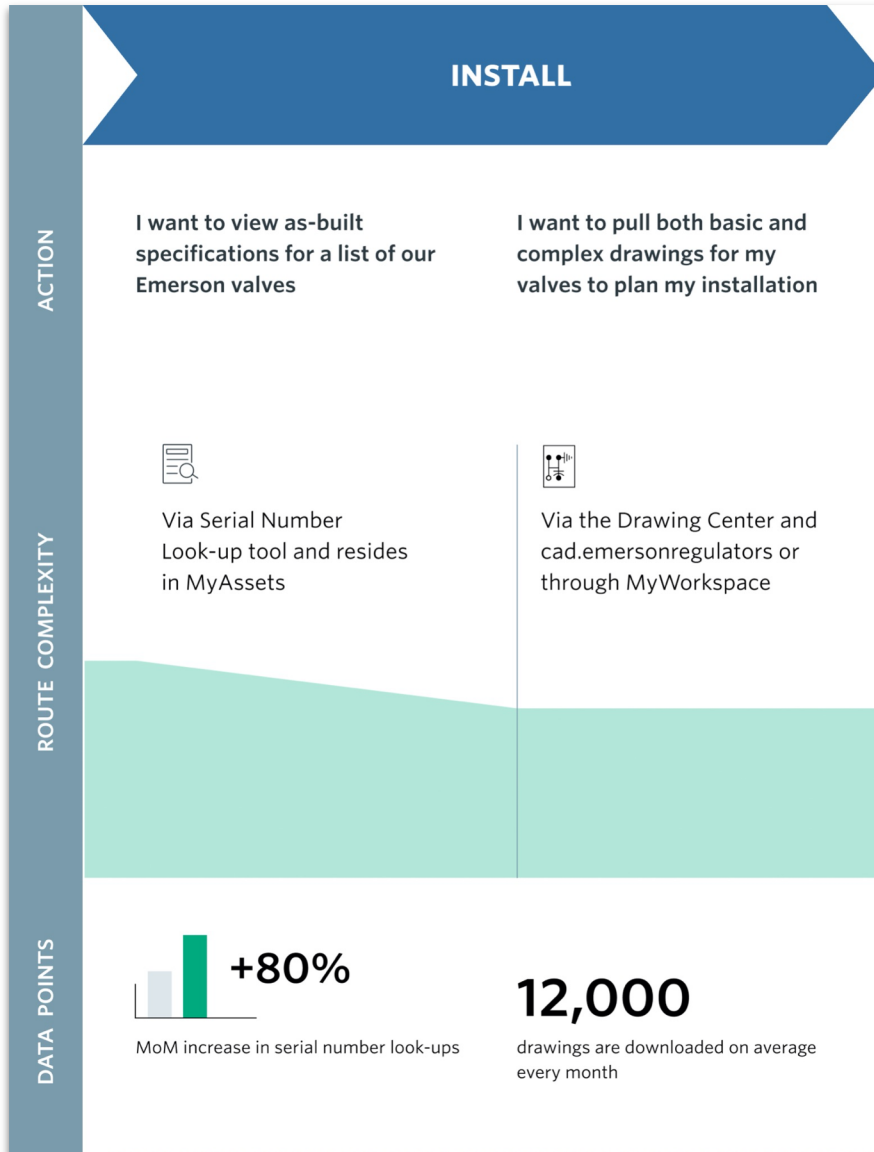
# Customer Journey—Procure Use Cases



**I want to digitally purchase the products I've found on Emerson.com.**

- Not all products have an Add to Cart call to action on their product details page. The current plan is to add actuation and PRM (Pressure) to the store. Isolation Valves are turned off and there is no plan for FCV (Flow Control Valves).
- Inconsistency of what can be purchased can lead to increased Customer confusion.
- New Customers don't receive messaging about Impact Partners at this stage of the journey.

# Customer Journey—Install Use Cases



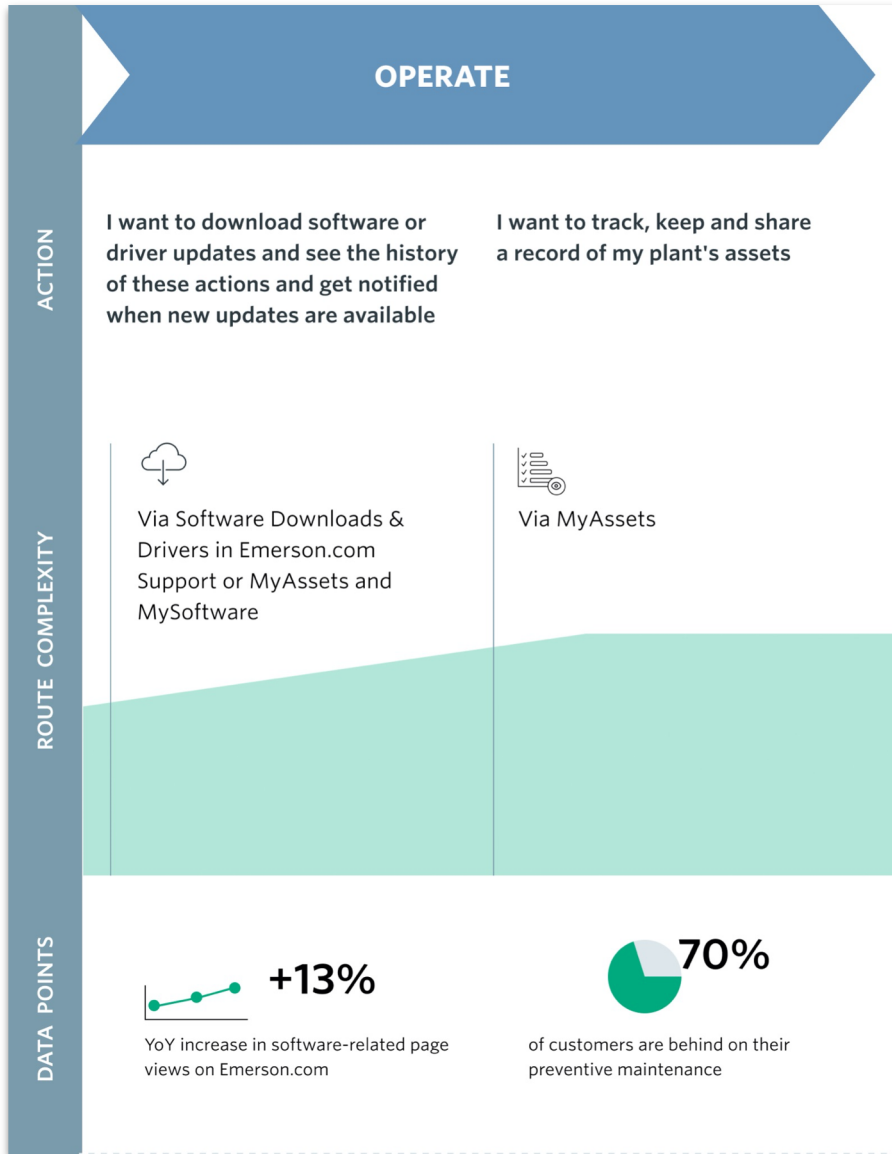
## I want to view as-built specifications for a list of our Emerson valves.

- Limited amount of serial number data loaded.
- Missing install data for products shipped to or assembled at an Impact Partner’s facility.
- Unclear how to get more information or what steps to take after finding asset through lookup tool.

## I want to pull both basic and complex drawings for my valves to plan my installation.

- It can be unclear which drawings are considered complex and which are not, creating confusion for users. Only basic drawings are available without a request.
- Workflow is daunting: Customer asks IP > IP asks Emerson > Emerson provides IP with drawing > IP provides drawing to Customer.

# Customer Journey—Operate Use Cases



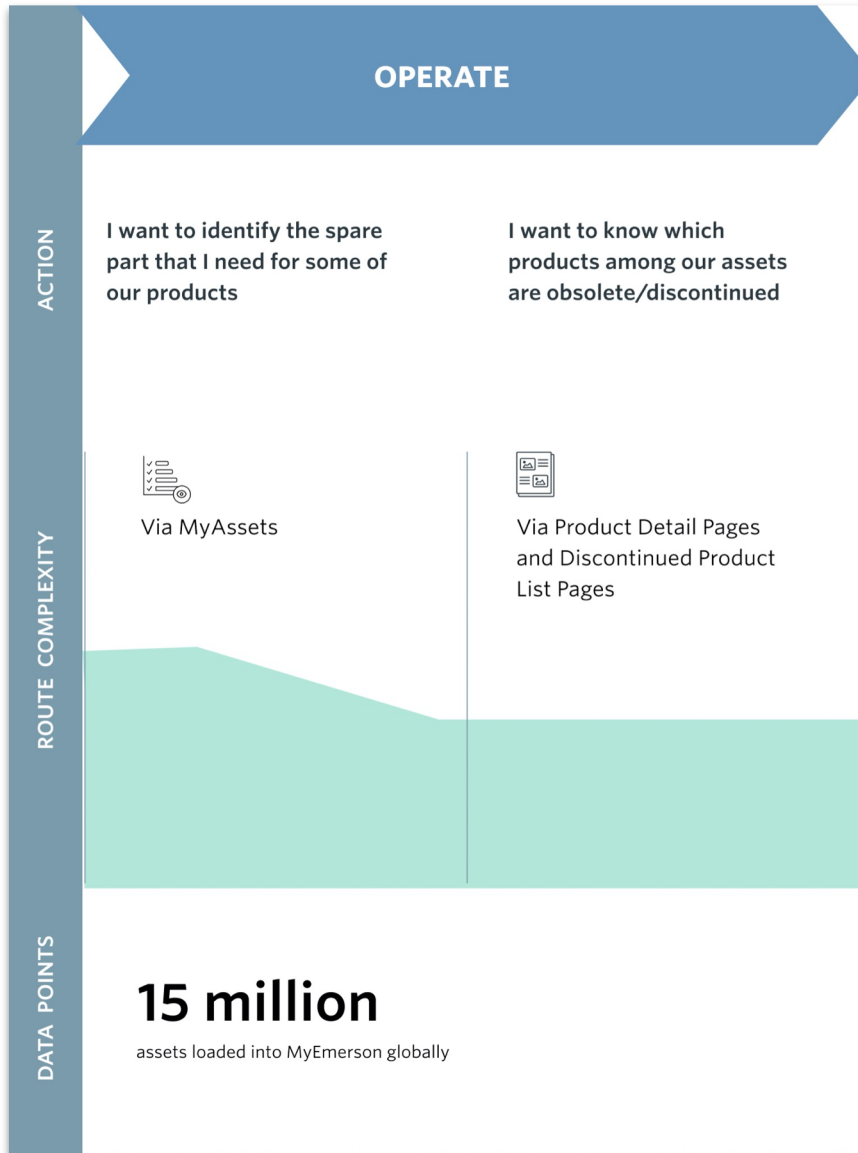
**I want to download software or driver updates and see the history of these actions and get notified when new updates are available.**

- Customers don't know where to go to find older/compatible versions of their software
- Security of software downloads is becoming critical to Customers

**I want to track, keep and share a record of my plant's assets.**

- Some Impact Partner portals have a version of asset tracking, but with limited data
- Different levels of access with different business units can cause confusion
- Competing tracker tools lack the ability to easily port the data across systems
- Tool needs complete data to operate at full potential
- Competitors are adding similar tools

# Customer Journey—Operate Use Cases



**I want to identify the spare part that I need for some of our products.**

- It can be unclear on Emerson.com what a Customer should do if they have an urgent need for a spare part
- No real-time advisors in place to determine if it is an upgrade, upsell or standard maintenance
- Business spends inordinate amount of time identifying spare parts for Customers

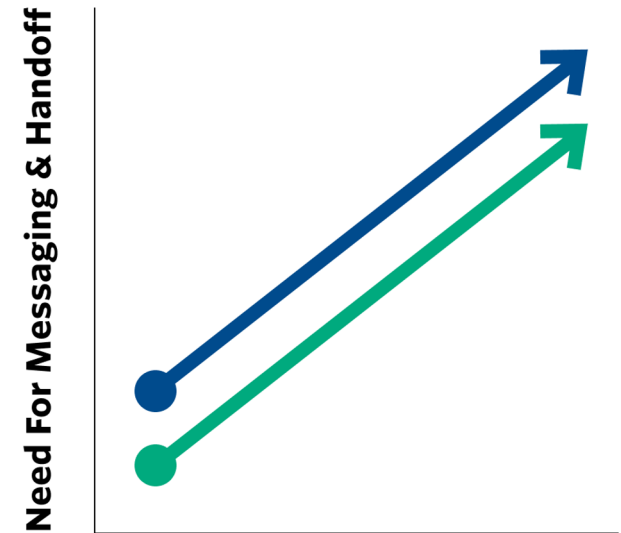
**I want to know which products among our assets are obsolete/discontinued**

- Customers don't always know when a product needs to be replaced or reconditioned



# Customer Journey Insights

- ✓ 61% of visitors to Emerson.com are in their first or second engineering job out of college and expect a low-friction, seamless digital experience. Their **experience should be simple and easy** to use — handoffs should be purposeful, timely and not limit the Customer's ability to get tasks done onsite.
- ✓ The level of **help and support should increase as a Customer navigates through Emerson.com** to MyEmerson and then to the Impact Partners, with minimal impact to a seamless Customer journey.
- ✓ The goal should not be to duplicate tools and efforts on both sides; instead, it should be to leverage what exists and optimize both digital ecosystems to **facilitate sharing and collaboration between Emerson and Impact Partners** on behalf of the Customer.



**Complexity & Purchase Intent**

*As product complexity and purchase intent increases on Emerson.com, a handoff to the Impact Partner can lead to improved Customer outcomes.*

# Themes and Activations

# Themes for Customer Success

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## ✔ **Contextual Messaging & Guidance**

Provide Customers with contextual support throughout the Emerson.com purchase journey with messaging and functionality at key touchpoints that offers access to relevant resources and timely assistance.

## ✔ **Digital Self-Service**

Empower Customers through a seamless, low-friction self-service model on Emerson.com that allows them to get deeper into the purchase funnel before engaging their Impact Partner.

## ✔ **Holistic Portfolio View**

Allow the business and Customer to see a holistic view of Customer product data within MyEmerson. This data and the associated insights can become a lead-generating vehicle for Impact Partners to upsell, cross-sell and provide high-value, personalized service to Customers — to anticipate their needs before they arise.





## **Contextual Messaging**

Deliver messaging at key moments that promotes the expertise of the Impact Partner, especially for more complex products and tasks on Emerson.com.



## **Impact Partner Locator**

Provide Customers with a direct, easy way to find their Impact Partner at relevant touchpoints on the Emerson.com.





## Contextual Messaging

Deliver messaging at key moments that promotes the expertise of the Impact Partner, especially for more complex products and tasks on Emerson.com

### Key Touchpoints

- Product Details Pages
- Contact Us / Chat
- Sizing Tools
- MyWorkspace
- MyAssets
- MyTransactions

### Activations

- Recommendations only apply to /en-us, /en-ca, and /fr-ca
- Messaging touchpoints should be uniformly identified and implemented across all Final Control business units for a consistent user experience
- The more complex the product, the greater the frequency and urgency of the messaging on a by-product basis
- To reduce Contact Us call volume, create a library of FAQs specific to North American business rules



# DCX Handoff Messaging Touchpoints

The Digital Customer Experience handoff messaging touchpoints are listed below and are ranked by urgency and complexity.

<b>Emerson.com</b> (/en-us, /en-ca, fr-ca)	<b>MyEmerson</b> (/en-us, /en-ca, fr-ca)
Contact Us	Request Quote from Commerce Cart
Chat	MyTransactions (checkout, order history)
Product Details pages (CTAs)	Configuration
Drawings Center and CAD Tools	Sizing Tools
	MyWorkspace activity
	MyAssets (spare parts)
	MyAssets (initiate service inquiry)
	Schedule Service (by 2022)
	Request Quote from MyAssets cart (by 2022)

# Out-of-Scope Messaging Touchpoints

The Digital Customer Experience handoff messaging touchpoints that are out of scope for the current initiative are listed below, with future implementation noted.

Emerson.com (/en-us, /en-ca, fr-ca)	MyEmerson (/en-us, /en-ca, fr-ca)
Catalog Listing pages	Registration
Catalog Product Comparison page	Account Dashboard
Brand pages	MySoftware (for now)
Software Downloads & Drivers	MyTraining (for now)
Technology Overview pages	MyPreferences



# Product Details Pages

Product Details Page for Fisher™ D4 Control Valve. The page includes a navigation bar with links: About, Investors, Careers, Contact Us, News & Events, Hello, Ethan, and United States (English). The main content area features a breadcrumb trail: Home / Automation Solutions / Valves, Actuators and Regulators / Control Valves / Globe Valves / Fisher™ D4 Control Valve. The product title is Fisher™ D4 Control Valve, with a description: The Fisher D4 control valve is a compact, rugged globe valve designed primarily for high-pressure, throttling applications using either [Read more...](#). Below the description are three buttons: LEARN ABOUT >, CONTACT SALES >, and SIZE >. The CONTACT SALES > button is highlighted with a red border. The page also includes a navigation bar at the bottom with links: SPECIFICATIONS, FEATURES, DOCUMENTS & DRAWINGS, and CONTACT US.

When a potential Customer is interested in a product, calls to action such as “Contact Sales” should be automatically directed to their Impact Partner instead of routing them through an unfiltered Contact Us page and requiring they turn on location services. Consider adding “Add to Cart” for all products to allow Customers to get deeper into the funnel and use MyWorkspace.

# Product Details Page, continued

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[Find a Local Partner](#)

Let a local expert find the right valve for you.



Request Quote

Request a quote for genuine valve and instrument parts.

Chat Now

For non-registered users, consider deploying eSpots, messaging ribbons and/or repurposing the page's utility belt (shown above) with a link that connects Customers to the [Impact Partner channel page](#), a third CTA could be added to promote sizing collaboration or to register for MyEmerson.

# Contact Us

## Contact Us

What would you like to do today?

TALK TO SALES

FIND A DISTRIBUTOR

FIND A DOCUMENT

CHECK ORDER STATUS

Connect With

CHOOSE A CONTACT



Location

Enter an address, city, postal code, or country

### Corporate Information

Automation Solutions Contact Center

[Contact Us](#)

Phone: +1 888 889 9170

Emerson US and World Headquarters | Emerson Electric Co.

8000 West Florissant Avenue, P.O. Box 4100,  
St. Louis, MO 63136,  
United States  
Phone: +1 314 553 2000

Need immediate local engineering support?

Find your [local service provider](#).

When a potential Impact Partner Customer needs immediate support in /en-us, /en-ca or fr-ca and uses Emerson.com's Contact Us, provide static messaging below "Automation Solutions Contact Center" to help them find their Impact Partner without having to work through the current (unfiltered) multi step Contact Us experience.

In general, all links to Contact Us should be prefiltered by Contact type, Brand and/or Category.

# Contact Us, continued

## Contact Us

What would you like to do today?

TALK TO SALES FIND A DISTRIBUTOR FIND A DOCUMENT CHECK ORDER STATUS

Connect With Clear Brand Clear Product Interest

**DISTRIBUTORS & WHOLESALERS** ▼ **FISHER** ▼ **CHOOSE A CATEGORY** ▼

Location

*Enter an address, city, postal code, or country* Please enter your location to continue Clear

Contact Type ▼ Distance (miles)

**ALL** ▼ 25 100 **500** 1000 No Limit

**Please enter a location**  
**No results found. Please refine your search.**

When a non-authenticated user comes from a “Contact Sales” CTA with a prefiltered URL string on a Fisher product details page, Customers with location services turned off are required to enter their zip code to find their Impact Partner. Add a focused state to the field to indicate what information is still required, and provide additional messaging or clearer, closer indicators that location data is required to proceed.

# Sizing Tools

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## Configure

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### Bettis G-Series Pneumatic Valve Actuator

Please configure your model number by selecting the appropriate "Required" and "Additional" option codes from the menu. The configuration must be valid before continuing to the Cart. Select "Save Progress" to save your configuration to the cart. Use the toggle switch to enable model number entry or build capability.



Tool is loading, please wait

You're configuring complex engineering products – please wait while the application loads. If you need help sizing, contact your [local service provider](#) or connect with them through a live chat.

Chat N

Adding help copy at this point would allow the Customers to know that an Impact Partner can assist with complex sizing challenges. Also, noting why it takes a relatively long time for this tool to load might reduce bounce rates.

# Sizing Tools

PROJECT TITLE	<input type="text"/>	TAG	<input type="text"/>
PREPARED FOR	<input type="text"/>	PREPARED BY	<input type="text"/>
DATE	<input type="text" value="19/04/2021"/>		

**Function**

PRIMARY FUNCTION	<input type="text" value="On / Off"/>	SECONDARY FUNCTION	<input type="text" value="None"/>
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**Application Requirements**

Primary Function	Secondary Function
OPERATION	<input type="text" value="Pilot Operated"/>
ACTUATION	<input type="text" value="Electric"/>
POSITION	<input type="text" value="Normally Closec"/>

Upon completion of a sizing, provide messaging that notifies the Customer that their completed sizing will be shared with their Impact Partner for final review and follow-up.

Your configuration is complete! We are emailing you and your local service provider a copy to ensure the configuration is accurate.



# MyWorkspace

Home / My Account / Workspaces

## Workspaces

Search by name or Keyword

Search only my workspaces

NAME <input type="button" value="v"/>	ITEMS <input type="button" value="v"/>	LAST UPDATED <input type="button" value="v"/>	DATE CREATED <input type="button" value="v"/>	TYPE <input type="button" value="v"/>	
Retrofit Project #1 <input type="button" value="i"/>	8	03/24/2021 by <input type="text"/>		Private	<input type="button" value="..."/>

1 - 1 of 1 items

Tooltip > Invite your local service provider to collaborate with you online. They can help select and size the right products for your next project.

Take the [MyEmerson tour](#) to learn more.

# MyWorkspace, continued

Home / My Account / Workspaces / Retrofit Project #1

Search products  FILTER BY LABEL  [Advanced Search](#) | [Check status](#) [ADD PRODUCTS TO WORKSPACE](#)

[View Workspace details](#) | [Export workspace](#)

<input type="checkbox"/>	TAG <input type="text"/>	PRODUCT <input type="text"/>	MODEL <input type="text"/>	SIZING	STATUS <input type="text"/>	UPDATED <input type="text"/>	QTY <input type="text"/>	...
<input type="checkbox"/>	Retrofit Project #1_8017317	Daniel 1-700-20-002 500 2 X .6250 X 1/8 Tk. 316S Universal Plate	1-700-20-002		complete	03/24/2021	1	...
<input type="checkbox"/>	Retrofit Project #1_8012231	Rosemount™ Extended 316 Stainless Steel Terminal Housing Cover...	03151-9030-0102		complete	03/24/2021	1	...
<input type="checkbox"/>	Retrofit Project #1_8017316	Rosemount™ 3051 Coplanar™ Pressure Transmitter	R-3051C		!incomplete configure product	03/24/2021	1	...
<input type="checkbox"/>	Retrofit Project #1_8017281	Hytork Excel (XL) Rack and Pinion Pneumatic Valve Actuator	XL MASTER ASLY		!incomplete configure product	03/23/2021	1	...
<input type="checkbox"/>	Retrofit Project #1_7997367	Bettis G-Series Pneumatic Valve Actuator	G MASTER ASLY		!incomplete configure product	03/23/2021	1	...
<input type="checkbox"/>	Retrofit Project #1_4922168	EasyHeat™ PN CEPGUK04	CEPGUK04		complete	01/14/2020	1	...
<input type="checkbox"/>	Retrofit Project #1_4310946	Appleton™ PN 75SA23005	75SA23005		complete	10/06/2019	1	...
<input type="checkbox"/>	Retrofit Project #1_3970598	Rosemount™ 3051L Level Transmitter	R-3051L		!incomplete configure product	07/31/2019 Ethan Machado	1	...

1 - 8 of 8 items

When products are added to MyWorkspace before being sized, there is another opportunity to alert Customers about the benefits of local expert support.

Tooltip > Invite your local service provider to collaborate with you online. They can help select and size the right products for your next project.

Take the [MyEmerson tour](#) to learn more.



# MyAssets

VIA QR CODE



Home / Devices / BKS720.0-LU-TE-0183

## BKS720.0-LU-TE-0183



<b>TAG</b> BKS720.0-LU-TE-0183	<b>SERIAL NUMBER</b> 18WETJ5600677	<b>CRITICAL</b> No
<b>BRAND</b>	<b>MODEL NUMBER</b> 0085N3P4J0080P0115N...	<b>LIFECYCLE STATUS</b> Active
<b>MANUFACTURER</b> Emerson	<b>DEVICE TYPE</b>	<b>SHIP DATE</b> March 7, 2018

### FISHER D4 CONTROL VALVE

The Fisher D4 control valve is a compact, rugged globe valve designed primarily for high-pressure, throttling applications using either pneumatic or electric control. This valve is ideal for use on pressure and flow control applications within the oil and gas production industry. These valves are especially useful for either throttling or on/off control of liquids or gases which are gritty, sticky, or which have a tendency to build-up on internal valve parts.

NOTES

The ability to add Final Control products to MyAssets will unlock new opportunities to message recommended services, replacement orders and other upsell/cross-sell opportunities.

# MyAssets Dashboard View

EMERSON INTERACTIVE PLANT ENVIRONMENT - SHAKOPEE, MN

eSpot > [Schedule a review](#) of your assets with your local service provider.

Home / Devices

## Devices

KEYWORD:  DEVICE TYPE:  DEVICE STATE:

Displaying results 1 through 50 of 9262

### Lifecycle Status

Category	Count	Percentage
Active	9,175	91.0%
Current	100	1.0%
Mature	30	0.3%
Supported	14	0.1%
Retired	1	0.01%
Obsolete	29	0.3%

### Device Type Categories

Category	Count	Percentage
Measurement Instruments	9,175	91.0%
Asset Management	100	1.0%

TAG	SERIAL NUMBER	DEVICE TYPE	BASE MODEL	LOCATION
	17WETN5708346	Temperature	114C	None
	17WETN5708347	Temperature	114C	None
	17WETN5708348	Temperature	114C	None

There is an opportunity to generate awareness and/or service leads with timely, logic-based eSpots depending on:

- First device added
- When X number of new devices are added
- When devices need repair or replacement

# MyAssets Details

The screenshot shows a web interface with a green navigation bar at the top containing the following tabs: DOCUMENTS & DRAWINGS, SPARE PARTS, FIND TRAINING, and CONTACT US. Below the navigation bar, the page is divided into several sections:

- Documents & Drawings:** This section includes a sub-menu with "MANUALS & GUIDES" (highlighted in green), "DATA SHEETS & BULLETINS", "DRAWINGS & SCHEMATICS", and "UPLOADED DOCUMENTATION". The "Manuals & Guides" sub-menu is open, and a red-bordered tooltip is positioned over it. The tooltip text reads: "Tooltip > Need a spare fast? We can put you in touch with your local service provider now. [Contact local service provider.](#)"
- Spare Parts:** This section features a blue information icon (i) and a list of items. The first item is "FISHER DIRTY SERVICE TRIM". A red-bordered tooltip is positioned over this item, containing the text: "Tooltip > Because each application is unique, consult with your [local service provider](#) before making a material or design change to your device." Below the list, there are two buttons: "ADD TO CART >" and "INITIATE SERVICE REQUEST >".
- Find Training:** This section is titled "Find Training" and contains the text "MyCONNECT: Temperature".
- Contact Us:** This section is titled "Contact Us" and contains the text "What would you like to do today?".

The spare part section should include messaging about ordering or required support.

# MyAssets Details, continued

The screenshot displays the MyAssets web interface with a green navigation bar at the top containing the following tabs: DOCUMENTS & DRAWINGS, SPARE PARTS, FIND TRAINING, and CONTACT US. The main content area is divided into four sections:

- Documents & Drawings:** Features a sidebar with categories: MANUALS & GUIDES (highlighted), DATA SHEETS & BULLETINS, DRAWINGS & SCHEMATICS, and UPLOADED DOCUMENTATION. The main content shows a document titled "Quick Start Guide: Rosemount 0085 Pipe Clamp Sensor" with a download icon, a size of 2128 KB, and a PDF file type.
- Spare Parts:** Includes an information icon and a list of parts with associated actions:
  - FISHER DIRTY SERVICE TRIM | [ADD TO CART >](#) | [INITIATE SERVICE REQUEST >](#)
  - FISHER DVI STEAM CONDITIONING DESUPERHEATER | [ADD TO CART >](#) | [INITIATE SERVICE REQUEST >](#)
  - FISHER DMA/AF VARIABLE GEOMETRY ATTEMPORATOR | [ADD TO CART >](#) | [INITIATE SERVICE REQUEST >](#)
  - FISHER WHISPER TRIM | CAGE | [ADD TO CART >](#) | [INITIATE SERVICE REQUEST >](#)
- Find Training:** Displays the text "MyCONNECT: Temperature".
- Contact Us:** Includes the text "What would you like to do today?".

For easy replacement service and to understand Customer needs, consider integrating a quick “Add to Cart” functionality in MyAssets.

In addition, consider creating an “Initiate Service Request” CTA within the MyAssets Spare Parts list.

# MyAssets Details, continued

DEVICES WALKDOWNS SITE REPORTS

DOCUMENTS & DRAWINGS SPARE PARTS FIND TRAINING CONTACT US

Enter an address, city, postal code, or country

## Contact ~~Corporate~~ Information

**AUTOMATION SOLUTIONS CONTACT CENTER**  
[Contact Us](#)  
Phone: + 1 888 889 9170

**EMERSON US AND WORLD HEADQUARTERS | EMERSON ELECTRIC CO.**  
8000 West Florissant Avenue, P.O. Box 4100,  
St. Louis , MO 63136,  
United States  
Phone: +1 314 553 2000

Automation Solutions Contact Center

Emerson US and World Headquarters | Emerson Electric Co.

**Experitec**  
1234 W. Main St, Ste 567  
St. Louis, MO 63139  
[636-123-4567](#)

As MyAssets traffic continues to grow, make contacting local expertise a prominent option for Customers.

In general, the contact information listed here should be specific to Service and Support contact options, not the broader corporate options currently listed.

# MyAssets Walkdowns

The screenshot displays the MyAssets Walkdowns dashboard. At the top left is the Emerson logo. The top right shows the user email 'ethan.machado@digitas.com', 'Log Out', 'United States', and 'English'. A search bar is also present. Below the navigation tabs (DEVICES, WALKDOWNS, SITE REPORTS), the site name 'EMERSON INTERACTIVE PLANT ENVIRONMENT - SHAKOPEE, MN' is displayed. A red-bordered notification box contains the text: 'eSpot > It's been a year! Time to schedule your next walkdown with your local service provider.' Below the notification is the heading 'Walkdowns'. A table lists walkdown records with columns for WALKDOWN NUMBER, SITE, DATE, and WALKDOWN DEVICES. The records are grouped by year: 2020 and 2019.

WALKDOWN NUMBER	SITE	DATE	WALKDOWN DEVICES
<b>2020</b>			
RO000033	EMERSON INTERACTIVE PLANT ENVIRONMENT: 6021 INNOVATION BLVD	Oct. 7, 2020, 8:09 p.m.	2
RO000028	EMERSON INTERACTIVE PLANT ENVIRONMENT: 6021 INNOVATION BLVD	July 28, 2020, 12:50 p.m.	6
<b>2019</b>			
RO000024	EMERSON INTERACTIVE PLANT ENVIRONMENT: 6021 INNOVATION BLVD	Oct. 21, 2019, 8:41 p.m.	270

Time-based messaging can help remind Customers when preventive maintenance or other periodic asset reviews would be beneficial. Such messaging might also be appropriate at the Customer's dashboard view.

# MyAssets Site Reports

The screenshot displays the MyAssets Site Reports dashboard. At the top left is the Emerson logo. The top right shows the user email 'ethan.machado@digitas.com', 'Log Out', 'United States', and 'English' language options, along with a search bar. Below the navigation bar, the current site is identified as 'EMERSON INTERACTIVE PLANT ENVIRONMENT - SHAKOPEE, MN'. A red-bordered notification box contains the text: 'eSpot > Your records indicate it's time to schedule a review of your valves with your local service provider.' Below the notification is the 'Site Reports' section, which contains a table with the following data:

SITE	LOCATION	DOCUMENT NAME	TYPE	REPORT DATE	DATE UPLOADED
EMERSON INTERACTIVE PLANT - ENVIRONMENT		Test Report	Connected Services Report	March 8, 2021, 3:19 p.m.	March 8, 2021, 3:24 p.m.
EMERSON INTERACTIVE PLANT - ENVIRONMENT		Valve Condition Monitoring	9000 - Condition Monitoring Report	Feb. 12, 2021, 5:56 p.m.	Feb. 18, 2021, 5:56 p.m.

Time-based messaging can help remind Customers when preventive maintenance or other periodic asset reviews would be beneficial. Such messaging might also be appropriate at the Customer's dashboard view.

# MyTransactions and Checkout Flow

Retro Project #2  
#1174683020368 | [View Cart Details](#) | [Continue Shopping](#)

[CHECK OUT >](#)

[ADD PRODUCTS](#) | [EXPORT](#) | [PRINT CART](#) | [ADD ATTACHMENT](#) | [ADD TO WORKSPACE](#) | [SAVE](#) | [REQUEST DATE](#)

PRODUCT	TAG/UNIT	AVAILABILITY	QUANTITY	UNIT PRICE (USD)	TOTAL (USD)	...
Rosemount™ O-ring for Housing Cover (Package of 12) 03031-0232-0001		2 Weeks Request Date	1			...
						<a href="#">Remove</a>
Rosemount™ 4088 Aluminum Housing with M20 Conduit 04088-9059-1219		2 Weeks Request Date	1			...

[ATTACHMENTS Add](#)

[Clear Cart X](#)

[CHECK OUT >](#)

[WHERE TO BUY >](#)

Freight charges and Tax are calculated and included in total

Checkout modal or interstitial > Your order request is being routed to your local service provider, who will help you complete the order.

A dynamic “Where to Buy” button could direct Customers to their Impact Partner.

Once valve products and spare parts can be added to the Workspace (or a cart), Customers should be able to add items to the cart to express purchase intent.

They could also print out their completed list of products and give it to their procurement team for final purchase authorization in some cases.



# MyTransactions and Checkout Flow, *cont.*


Shopping Cart | Shipping | International Trade Compliance | **Billing** | Review & Submit Order

## Billing Information

ROSEMOUNT INC.

PRODUCT	AVAILABILITY	QUANTITY	PRICE (USD)	TOTAL (USD)
Rosemount™ O-ring for Housing Cover (Package of 12) 03031-0232-0001	2 Weeks	1		
Rosemount™ 4088 Aluminum Housing with M20 Conduit 04088-9059-1219	2 Weeks	1		

**BILLING ADDRESS** **SELECT PAYMENT TYPE**

 Purchase Order ▾

**\*PURCHASE ORDER NUMBER**

\*Please Attach Purchase Order

[Change Address](#)

[< BACK TO COMPLIANCE](#) [CONTINUE >](#)

<sup>1</sup> Freight charges and Tax are calculated and included in the final order price.

Given current business agreements, it seems unlikely that a Customer will be able to advance to these final two steps (Billing shown here and Shipping on the next page). However, a MyEmerson user with Procurement privileges may reach this step in the future.

If so, deliver messaging allowing them to complete the transaction here (in select cases) so that they understand the invoice and records will be available via their Impact Partner.

Because of the legal intricacies of this proposed experience, any messaging would need careful legal consideration and wording.

# MyTransactions and Checkout Flow, *cont.*

Shopping Cart | Shipping | International Trade Compliance | Billing | Review & Submit Order

## Shipping Information

ROSEMOUNT INC.

PRODUCT	AVAILABILITY	QUANTITY	PRICE (USD)	TOTAL (USD)
Rosemount™ O-ring for Housing Cover (Package of 12) 03031-0232-0001	2 Weeks	1		
Rosemount™ 4088 Aluminum Housing with M20 Conduit 04088-9059-1219	2 Weeks	1		

**SHIPPING ADDRESS**

**SHIPPING CARRIER** Emerson Preferred **SHIPPING PRIORITY** Standard

**SHIPPING OPTIONS**

- Ship products as they become available
- Add Shipping Instructions
- Add Packing Instructions

**Tax Exemption Information (Optional)**

SELECT TAX EXEMPT CERTIFICATE:

Select File

OR

[Upload new tax exempt certificate](#)

< BACK TO CART CONTINUE >

<sup>1</sup> Freight charges and Tax are calculated.

Because of the legal intricacies of this proposed experience, any messaging would need careful legal consideration and wording.

Given current business agreements, it seems unlikely that a Customer will be able to advance to these final two steps (Shipping shown left). However, a MyEmerson user with Procurement privileges may reach this step in the future.

If so, deliver messaging allowing them to complete the transaction here (in select cases) so that they understand the invoice and records will be available via their Impact Partner.



## Impact Partner Locator

Provide Customers with a more direct and easy way to find their Impact Partner at key, relevant touchpoints on the Emerson.com site.

### Key Touchpoints

- Catalog Pages
- Product Detail Pages
- Contact Us
- MyEmerson

### Activations

- Consistently leverage the ability (existing functionality) to use contextual links that route a user to a pre-filtered view of Contact Us (products, category, brand). Never send a user to Contact Us with an unfiltered link.
- Create Contact Us FAQs that help guide a user down the right path to their Impact Partner (e:, what is an Impact Partner translated as a distributor, etc.).
- Create an Impact Partner Locator Widget that lives on Emerson.com and provides contact information quickly and on-page.





## Impact Partner Locator Widget

 St. Louis, Mo [Edit Location](#)

**NEAREST EMERSON IMPACT PARTNER**

**Experitec**  
1234 W. Main St, Ste 567  
St. Louis, MO 63139  
[636-123-4567](#)

[VIEW MORE PARTNERS >](#)





EDIT LOCATION ×

SELECT LOCATION

Enter your new location above

EDIT LOCATION ×

SELECT LOCATION

-  Chicago, IL
-  Chicago, IL
-  Chicago, IL
-  Chicago, IL



I want to know more about Emerson valves. Who do I contact?

Via Contact Us call, chat or form submission

I would like to know how to purchase Emerson valves

Via Emerson.com catalog listing and product details pages (PDP)

I want to know which products can solve for our existing valve issues

Via catalog comparison, brand and technology pages, and ultimately, using tools

I want to add multiple products to a list for my engineering research project and eventual purchase

Via MyWorkspace as a registered user in MyEmerson

I want to digitally purchase the products I've found on Emerson.com

Via shopping cart checkout flow as a registered MyEmerson user

I want to view as-built specifications for a list of our Emerson valves

Via Serial Number Look-up tool and needles in MyAssets

7,000+

new products per month on Emerson.com are routed to a local Impact Partner

3,313

new products available in the Emerson.com catalog

+578%

Net increase in products added to MyWorkspace by customers

+56%

Net increase in configurations as a precursor to purchase

+80%

Most increase in serial number look-up

Over 50% of our essential Impact Partners are in the United States. There is no direct routing or early handoff. Customers need to wait to be routed.

Only from this automated handoff, we direct routing to the correct Impact Partner.

INITIALLY ASSIGNED

If customer has a transaction related inquiry, our direct routing will direct them to the correct Impact Partner by Customer Care.

If Customer Care can handle the request, they will answer it directly without a handoff.

There are no automated handoffs after a chat.

Impact Partner is presented in a self-serve interface to support partners.

Our new all Customer Care design to direct by business and system flags for customer experience to reduce and reduce.

Center US is the link to Center on that is linked by the right product category and brand.

Send Team Handoffs

Impact Partner Action Insights

TO WINNY PARTNER

Deliver Our Best Leads

Deliver Our Best Customer Insights

TO ENHANCE

Reduced Call Volume

Library of Customer Questions and Answers

Clear benefits and depth of value offered to our Impact Partner and can't be purchased online

Call to action are inconsistent and vary by product adding to potential confusion for all new users or users for some CTAs

No clear next steps

INITIALLY ASSIGNED

Once customer completes the request for quote form and details that request is passed off to the Impact Partner for an official quote

All of our products have a process to request a quote

Impact Partner is presented in a self-serve interface to support partners.

Our new all Customer Care design to direct by business and system flags for customer experience to reduce and reduce.

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Reduced Call Volume

Library of Customer Questions and Answers

There is no automated handoff in place to send the request to the correct Impact Partner after status is confirmed

Different requirements per product

Not clear next steps

INITIALLY ASSIGNED

Once customer completes the request for quote form and details that request is passed off to the Impact Partner for an official quote

All of our products have a process to request a quote

Impact Partner is presented in a self-serve interface to support partners.

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Deliver Our Best Leads

Deliver Our Best Customer Insights

TO ENHANCE

Reduced Call Volume

Library of Customer Questions and Answers

Business rules can lead to a confusing user experience when only a limited number of products can be added to MyWorkspace

Only products that can be added to MyWorkspace are those products that can currently be purchased online on Emerson.com

Not clear next steps

INITIALLY ASSIGNED

Once the customer adds items to the shopping cart and submits a request for quote, we will handle the request.

All products can be added to MyWorkspace

Impact Partner is presented in a self-serve interface to support partners.

Our new all Customer Care design to direct by business and system flags for customer experience to reduce and reduce.

Center US is the link to Center on that is linked by the right product category and brand.

Send Team Handoffs

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TO WINNY PARTNER

Deliver Our Best Leads

Deliver Our Best Customer Insights

TO ENHANCE

Reduced Call Volume

Library of Customer Questions and Answers

Not all products have an Add to Cart button or other product details page. Customers are forced to add items to MyWorkspace

Inconsistency of what can be purchased can lead to increased customer confusion

Not clear next steps

INITIALLY ASSIGNED

Once the customer adds items to the shopping cart and submits a request for quote, we will handle the request.

All products can be added to MyWorkspace

Impact Partner is presented in a self-serve interface to support partners.

Our new all Customer Care design to direct by business and system flags for customer experience to reduce and reduce.

Center US is the link to Center on that is linked by the right product category and brand.

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TO ENHANCE

Reduced Call Volume

Library of Customer Questions and Answers

Order flow to get more information or when they have already added

Not clear next steps

INITIALLY ASSIGNED

When a customer wants to view an invoice, they will be directed to the correct Impact Partner by Customer Care.

All of our products have a process to request a quote

Impact Partner is presented in a self-serve interface to support partners.

Our new all Customer Care design to direct by business and system flags for customer experience to reduce and reduce.

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Reduced Call Volume

Library of Customer Questions and Answers

# Digital Self-Service

Empower Customers through a seamless, low-friction, consistent self-service model on Emerson.com that allows them to get deeper into the purchase funnel for all Business Unit products before engaging their Impact Partner.





## **Product Catalog Availability**

Allow Customers to view products on Emerson.com, conduct preliminary research, add to cart, and open the door to automated RFQs that get routed to the Impact Partners.



## **Intelligent Engineering Tools**

Allow Customers to go as far as they want by making all sizing and configuration tools available — and ultimately get to a quote faster with their Impact Partner.



## **Unlock MyEmerson Functionality**

Enable Customers to efficiently utilize the comprehensive digital tool set available within MyEmerson (e.g., MyAssets, MyWorkspace, etc.) so that they can complete transactional tasks quickly and get one step further in the purchase funnel.

## Product Catalog Availability

Allow Customers to view products on Emerson.com, conduct preliminary research and open the door to quick, automated RFQs from the Impact Partners.

### Key Touchpoints

- Catalog Pages
- Product Detail Pages

### Activations

- Update the product catalog to include all Final Control products.
- Provide consistent messaging and CTAs on the PDP pages.
- Enable the ability to Add to Cart, and drive request for quotes (RFQ) to the Impact Partner.
- Ability to build and collaborate with Impact Partners in MyWorkspace and MyAssets.
- Ultimately, let Customers purchase spare parts and other “less complex” products on Emerson.com with smart Order Orchestration that routes to the Impact Partner for procurement and fulfillment.

## Intelligent Engineering Tools

Allow Customers to go as far as they want by making sizing and configuration tools available, and ultimately get to a quote faster with their Impact Partner.

### Key Touchpoints

- Engineering Tools
- Product Detail Page CTAs

### Tools for Consideration

- FCV Severe Service App
- FCV Spare Part Selector
- FVC Product Sizing tool
- PRM Regulator Tool Kit
- PRV2Size will be available in MyEmerson in FY22
- ACT Sizing tool and Configurator

### Activations

- Make relevant engineering tools available on the Engineering Tools section of Emerson.com.
- Allow Customers to size/configure from a PDP page CTA.
- Pass the data from these tools to the Impact Partner for collaboration and quoting.
- Customers should be required to register for MyEmerson or log into their account in order to size/configure a product.



# Engineering Tools

## Online Sizing and Selection Tools

### DP Flow Configuration Assistant

Easily size and configure DP flow devices to your unique requirements.



### Flow Sizing and Selection

Easily define the products best suited for your defined application parameters.



### AVENTICS Pneumatics Product Calculation

Easily find the best suitable product for your defined application parameters.



### DP Level Configuration Assistant

Calculate range points for your DP level measurement.



SHOW MORE

As part of the recommended consolidation, consider adding all online valve sizing tools to the MyWorkspace/ Engineering Tools landing page.

Since the content of this page is growing and business units will demand equal visibility, consider using a list or different component without “Show More” to give all tools a more equitable display.

Make the tools findable and searchable.



## Unlock MyEmerson Functionality

Enable Customers to efficiently utilize the comprehensive digital tool set available within MyEmerson (MyAssets, MyWorkspace, etc.) so that they can complete transactional tasks quickly.

### Key Touchpoints

- MyAssets
- MyWorkspace

### Activations

- Make products available in the catalog so that Customers can use the helpful, existing functionality available within MyEmerson.
- Allow Customers to create Workspaces in MyWorkspace and share/collaborate with their Impact Partner (ultimately getting to quoting quicker and more efficiently).
- Allow Customers to add their Assets and manage their Emerson/plant portfolios in a single location.



I want to know more about Emerson valves. Who do I contact?

Via Contact Us call, chat or form submission

I would like to know how to purchase Emerson valves

Via Emerson.com catalog listing and product details pages (PDF)

I want to know which products can solve for our existing valve issues

Via catalog comparison, brand and technology pages, and ultimately, using tools

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Via Serial Number Look-up tool and needles in MyAssets

7,000+

new lead per month on Emerson.com are routed to a local Impact Partner

3,313

new products available in the Emerson.com catalog

+578%

Net increase in products added to MyWorkspace by customers

+56%

Net increase in configurations as a new user to purchase

+80%

Most increase in serial number look-up

Check if your business requires customers to the call flow contact Partner. There is no direct routing or call flow. Customer leads are routed to the right.

Clear branding and depth of value offerings on the website and call to be purchased on the site.

There is no automated routing in place to send the user to the customer's Impact Partner after search is complete.

Business rules connect to a routing tool and route users either into a contact number of products can be added to MyWorkspace.

Not all products have an Add to Cart button on their product detail page. Customers are to add details on another page.

Customer flow to get more information or when they are after finding asset.

Only form that is automated handled, with this routed to the correct Impact Partner.

Call to action are inconsistent and vary by product, adding to potential confusion on all new items or request for quote (RFQ).

Different resolution requirements per product.

Only products that can be added to MyWorkspace are those products that currently be purchased on the website.

Inconsistency of what can be purchased can lead to increased customer call volume.

Emerson.com does not have a clear impact to users at the end of the journey.

# Holistic Portfolio View

INITIALLY UNASSIGNED

ASSIGNED

ASSIGNED

ASSIGNED

ASSIGNED

NOT YET ASSIGNED

If customer has a transaction related inquiry, Customer Care will direct them to the correct Impact Partner by Customer Care.

All products have an option to request a quote.

The customer can also use the MyWorkspace with the Impact Partner as their valve.

All products can be added to the cart.

There is a visible, automated routing to partner.

A customer needs to click an add to cart button. The 13 pieces of data available in MyAssets, the customer can be added to contact the Impact Partner.

If Customer Care can handle the request, they will answer. If they cannot, it is routed to a partner.

There are no automated handoffs after a chat.

Most granular for Impact Partners, who have their own customer engagement MyWorkspace for processing and routing.

Impact for Quote would be given automatically, present on the My Workspace.

Customers can add products that can be purchased on Emerson.com to MyWorkspace.

Single customer can be processed to various products and requirements.

Impact Partner information about Impact Partners, including contact details, pages for on-site, on-line, and in-store.

For valves and other on-site requests, Impact Partner can be added to the project page (MyWorkspace) and follow embedded MyWorkspace.

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Send form handoffs

Send form handoffs

Send form handoffs

Send form handoffs

Send form handoffs

Send form handoffs

Deliver Our File Leads

Deliver Our File Leads

Deliver Our File Leads

Deliver Our File Leads

Deliver Our File Leads

Deliver Our File Leads

Reduce Call Volume

Reduce Call Volume

Reduce Call Volume

Reduce Call Volume

Reduce Call Volume

Reduce Call Volume



## **Data Sharing**

Streamline the Customer's ability to see all their relevant data within MyEmerson, and ultimately become a lead-generating machine for the Impact Partners to upsell, cross-sell and provide high-value personal touchpoints through data sharing.



## **Automated Handoffs**

Allow Customers to quickly accomplish what they need to through automated handoffs and proactive touchpoints with their Impact Partner.

## MyEmerson Data Sharing

Streamline the Customer's ability to see all their relevant data within MyEmerson, and ultimately become a lead-generating machine for the Impact Partners to upsell, cross-sell and provide high-value personal touchpoints through data sharing.

### Key Touchpoints

- MyAssets
- MyTransactions

### Activations

- Allow Customers to see a full picture of their portfolio in MyAssets.
- Allow Customers to see Asset Data: service history, transaction history, calibration records, warranties, obsolete products and as-built data.
- Allow Customers to see when they need service or other upsell/cross-sell and service opportunities through the interactive timeline view.
- Allow Customers to register their Emerson products upon purchase and track the lifecycle of that product within MyEmerson.
- Automatically pass these upsell/cross-sell and service opportunities to the Impact Partner as leads.



# MyEmerson Data Sharing

MyEmerson > MyAssets > Device View

Administration | Kristin.Steiner@Emerson.com | Log Out | United States | English

---

**DEVICES** | WALKDOWNS | SITE REPORTS

**CELANESE INTERNATIONAL CORP**  
 9502 BAYPORT BLVD  
 PASADENA, TX 77507-1402  
 UNITED STATES

- Distillation Column 2
- Distillation Column 1
- Cracking Unit 2
- Cracking Unit

### Device Actions Available

- Lifecycle Status
- Warranty Status
- Firmware Status
- Device Driver Status
- Calibration Status

23% of critical devices are Retired/Obsolete Status [VIEW DEVICES >](#)

41% of critical devices have expired warranty or warranty expiring in <2 months [VIEW DEVICES >](#)

18% of critical devices have pending firmware updates [VIEW DEVICES >](#)

### Service Notifications

- New Connected Service Report Added
- New firmware released for 3051 models
- Support contract expiring on Trex Device

[MORE >](#)

---

**KEYWORD**

**DEVICE TYPE**

All ▼

**DEVICE STATE**

All ▼

**APPLY FILTERS**

TAG	SERIAL NUMBER	DEVICE TYPE	BASE MODEL ▲	LOCATION
FIT-10071	25381192	Flow	2400S	Cracking Unit 2
TW32529	175ITB3569012	Temperature	0065	Cracking Unit 2
	2213565	Pressure	1151	Cracking Unit 2

### Site History and Key Scheduled Activities

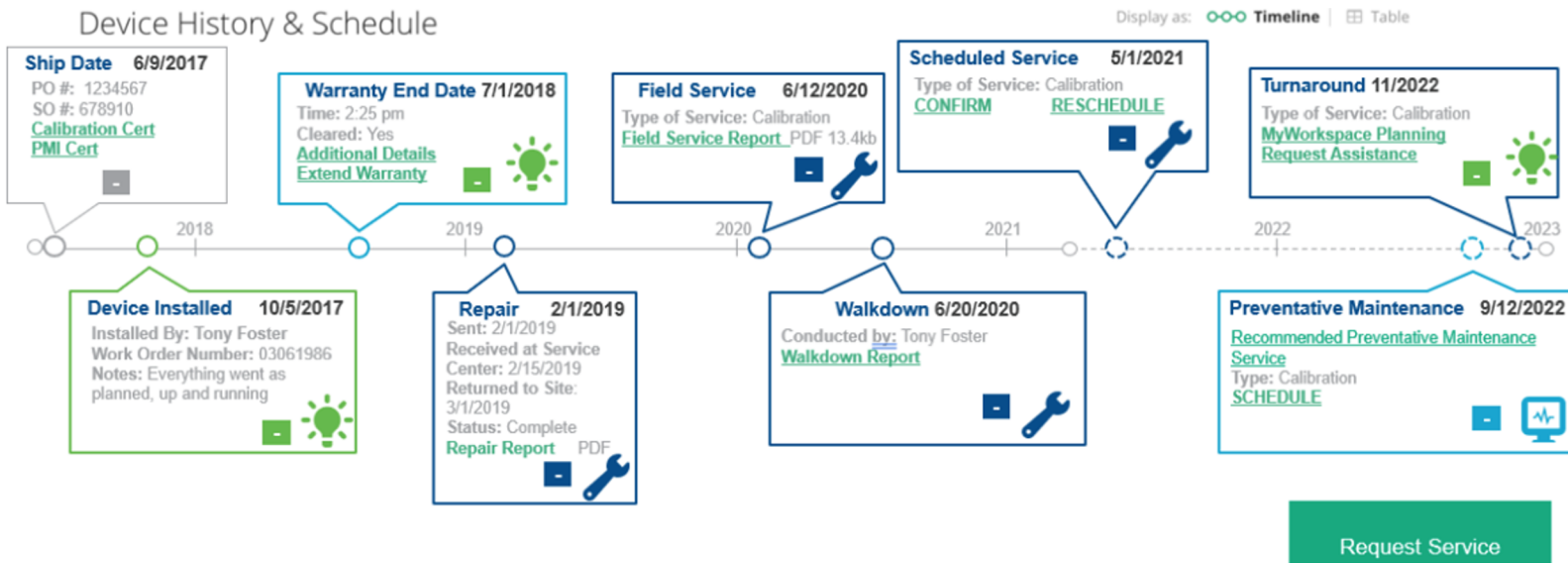
- Scheduled 06/2/21  
Calibration
- Scheduled 05/19/21  
Walkdown
- 03/03/2021  
Completed Walkdown
- 11/12/2020  
Field Service Completed

[MORE >](#)



# MyEmerson Data Sharing

MyEmerson > MyAssets > Timeline View





## MyEmerson Data Sharing

### Technical Considerations

- Share data between Emerson and the Impact Partners that provide lead generation opportunities within MyAssets and MyTransactions (specifically product data/asset data).
- Data can still be owned by the source, but shared/viewable by the other parties; a data sharing agreement would be helpful to put in place — this is a contract which outlines what data is being shared, how/where it can be used, method of sharing, data model/format definitions, data security, maintenance and so on.
- There are a few ways data could be shared: data could be pulled real-time with a direct Emerson <> Impact Partner API connection, batch file upload or create an API endpoint from a shared Impact Partner data warehouse with strict access rules.
- A Customer's MyEmerson profile will need to be tied to a specific Impact Partner and have a shared ID or user signifier (e.g., Email Address, Customer Name, etc.) to pull data when a user logs in to MyEmerson.
- Outside of RFQ requests, pass automated notifications of a Customer's behavior and lead generation alerts back to the Impact Partner via an alerting system (emails) or directly into the Impact Partners sales tool for follow-up.
- Further technical evaluation would be required to determine feasibility, timing and level of effort.





## Automated Handoffs

Allow Customers to quickly accomplish what they need to through automated handoffs and proactive touchpoints with their Impact Partner

### Key Touchpoints

- Contact Us
- Product Detail Pages
- Download Drawings
- Complete Sizing
- MyWorkspace  
Creation
- MyAsset Addition
- Request for Quote

### Activations

- Automation of qualified leads via Contact Us directly to the Impact Partners for Phone and Chat (call transfers, chat takeovers, data sharing, etc.).
- Automatically send notifications to an Impact Partner that their authenticated Customer has downloaded a drawing, completed a sizing, added an asset and created a Workspace (Next Best Sales Actions in progress).
- Automatically route RFQs to an Impact Partner.

# Contact Us—Chat

**CHAT WITH US**

Please provide your information to begin the chat.

**PRODUCT / SERVICE**

--

**FIRST NAME**

**LAST NAME**

When an Impact Partner Customer completes a chat session, provide messaging that they will be automatically connected with their Impact Partner if they wish to do so. Or provide a dynamic link that connects with an Impact Partner.

Please stay on the chat while we transfer you to a local expert.

# Summary



# Summary

## Contextual Support

### Contextual Messaging

- ✓ Onsite Messaging
- ✓ FAQs

### Impact Partner Locator

- ✓ Locator Widget/Modal
- ✓ Filtered Links to Contact Us
- ✓ Contact Us FAQs

## Digital Self-Service

### Product Catalog Availability

- ✓ Product Catalog/Data Upload
- ✓ PDP CTA Updates

### Intelligent Engineering Tools

- ✓ Make Tools available from PDP CTAs
- ✓ Make Tools available in corresponding Emerson.com section

### Leverage MyEmerson

- ✓ Product Catalog/Data Upload
- ✓ MyWorkspace & MyAssets

## Holistic Portfolio View

### Data Sharing

- ✓ MyEmerson Profile ID
- ✓ Two-Way API Connections with Impact Partner for Product Asset Data
- ✓ Lead generation data to Impact Partners

### Automated Handoffs

- ✓ Contact Us Transfers
- ✓ Behavior Notifications - Next Best Sales Actions
- ✓ RFQ Automation

# Next Steps



# Next Steps

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- Reassemble Flow Controls CAT team to review recommended actions
- Present recommendations to other Business Units for feedback
- Present recommendations to Impact Partners for feedback
- Develop list of recommendations that have agreement to proceed forward
- Scope technical work for final list
- Set the timeline for Implementation

# Thanks!

