

# Intelligent Orchestration

## Five Imperatives for Engaging Customers with Relevant, Proactive, Real-time Offers Along Their Digital and Physical Journeys

### INTRODUCTION

The need to orchestrate engagement across all customer channels and devices with a precise sequence, context, and purpose is reaching a critical inflection point. Poorly orchestrated campaigns and engagement across the communication mix will be ineffective at a minimum and potentially detrimental to a brand if they are inconsistent, untailored, and full of friction. Lacking orchestration in today's market will result in brands missing optimal moments to effectively connect with the always-on customer across multi-touch, multi-event buying journeys.

As brands, retailers, and other enterprises have evolved, they have created separate customer engagement silos to fuel growth, but customers no longer tolerate the limitations and points of friction that silos create. With customers increasingly in control, the burden is now on enterprises to engage consistently and in relevant ways with customers, across all channels and devices. A truly customer-centric approach builds a relationship with a customer across all touchpoints. Such a granular level of engagement requires deep insights about customers' behaviors and transactions as well as the ability to predict customer intent.

Whether it's social, mobile, POS, websites, email, tablets, or contact centers, customers use a variety of channels and devices to interact with organizations. As they weave their way in and out of these non-linear buying journeys, companies must proactively respond at the critical moments, when relevant messaging, information, responses to queries, or promotions will best create a conversion or prevent a defection. Effectively meeting the needs of these omni-present customers requires an enterprise-wide strategy and an investment in modern technology.

Despite the positive impacts on customer value, many enterprises have yet to meet such requirements. In a June 2016 survey from the CMO Council, respondents were asked how customers prefer to engage with their organizations and 25 percent said their customers connect through an increasingly complex blend of online and offline interactions. However, only 38 percent of respondents said they're able to orchestrate the delivery of content across all the media channels that they use today. Additionally, 20 percent of participants in a Winterberry Group survey responded, "not at all" or "not very well" when asked if their organizations can orchestrate delivery of content across all media channels that it uses today.

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Intelligent Orchestration is required for enterprises to gain the agility and sophistication to engage in real-time, personalized ways with individual customers as they move along channels and devices. This is the ability to respond with the right messages, offers, and content – in real time – across all channels and touchpoints, all the time.

Intelligent Orchestration involves much more than just knowing a customer's name. It means knowing what a customer wants, needs, and where she is in her buying journey. It means realizing the opportunities to improve the relationship by solving her problems, anticipating her needs, or purely delighting.

Simply put, intelligent orchestration is the connecting point between all consumer interactions, online and off, past and present. As such, it's the foundation for all consumer engagements—across the web, mobile apps, stores, email, mail, digital ads, and contact centers.

There are many points of evidence that intelligent orchestration is a key capability required to drive today's business and interactions with customers:

- Companies with extremely strong hannel customer engagement reported an 89 percent customer retention rating, compared to 33 percent for companies with weak omnichannel customer engagement. (Aberdeen Group)
- 40 percent of consumers purchase more from retailers that provide a personalized shopping experience across channels. (The E-tailing Group)
- Omnichannel shoppers have a 30 percent higher lifetime value than those who shop using only one channel. (IDC)

The evidence is clear: In the race for consumer attention and loyalty, brands must be able to recognize and relate to customers with immediacy, consistency, and relevancy throughout their omnichannel journeys, from purchase to delivery and beyond. Otherwise they will lose to competitors that can. Enterprises that fail to intelligently orchestrate communications and promotions across the brand and customer channels will get left behind as the pace of digital adoption quickens.

## Enterprises Race to Keep Pace with Digital Transformation

Massive proliferation and advancement of mobile technologies, mechanisms, and digital channels has dramatically altered consumer expectations within just about every market on the planet. Today, these new omni-present consumers expect seamless, cross-channel accessibility and functionality in all their purchasing endeavors and interactions. As these consumers engage with brands across multiple interfaces simultaneously (tablets when shopping in-store, interfacing with beacon near fields and other location-based technologies, and placing orders on mobile phones for pick-up in-store), organizations must get in cadence and be ready to change the conversation as customers change devices.

This level of digital transformation requires agility from organizations to respond to change and engage with the digitally connected, always on/always available consumers in ways that reflect their needs, preferences, and expectations at any – and all – moments across the customer lifecycle.

For brands, retailers, and enterprises, this presents new opportunities to deepen their relationships with consumers – but only if they can overcome the brand and customer experience consistency issue across these new mechanisms and channels. ■

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DEFINITION:  
Intelligent orchestration is the consistent delivery of relevant, contextually aware, and hyper-personalized next-best-actions across all customer journey stages and all enterprise touchpoints

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**55%**  
of businesses use 10 channels to interact with customers.

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Aberdeen Group

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**50%**  
of customer interactions now happen during a multichannel, multi-event journey.

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McKinsey

## CHAPTER 1

# Five Steps of Intelligent Orchestration

Although the benefits of intelligent orchestration to the omni-present consumer are evident, enterprises still fall short of delivering seamless, relevant, and timely communications across marketing, sales, and service operations, as well as across digital and traditional channels.

In many cases, channel-specific orchestration engines, e.g., web personalization engines that lack the ability to coordinate across the entire customer journey and lifecycle, are at work and consequently cause incongruences between lines of business. Amidst this chaos is the customer, who no longer compares his interactions with brands to their traditional competitors. Instead he compares them to customer experience leaders like Amazon, Apple, and Starbucks. Even these brands have their shortcomings, yet they have elevated customer expectations by providing an ease of doing business across channels, by understanding and acting on customers' needs, and by predicting intent.

Brands must take the lead from customer experience leaders, and put the tools in place to follow, manage, and respond to the customer journey across channels and devices. They must help enterprises anticipate customers' needs and respond at the right moments with the right interactions. Such intelligent, proactive, and fast responses require the ease and speed provided by intelligent orchestration.

Enablement of intelligent orchestration requires five main steps: The ability to gather unstructured and structured data, resolve customer identities across channels and devices, analyze and make predictions, unify the customer experience, and act on omnichannel customer data in real time.

### 1. Unify the Customer Experience Across the Enterprise

Enterprises must cohesively engage their customers and prospects in a continuous dialog, across the full spectrum of channels. Customers don't know or care who in a company owns the "customer experience" across different business functions and systems. Today they have an expectation that data regarding their transactions is available across any interaction touchpoint, including partners and franchisees. From their perspective, these are all part of one and the same journey. No longer can individual lines of business own specific aspects of the customer journey. Customer experience must be shared across organizations. This trend is fueling intelligent orchestration efforts focused on identifying, understanding, and mastering the customer journey from end to end.

#### **CHALLENGE: Lack of Bi-Directional Integration and Workflow**

Enthusiasm for intelligently interacting with customers along the customer journey is emerging in enterprises, but many organizations remain hampered on the back end by siloed channels and departments or lack seamless workflow. When data, channels, departments, and teams are tightly integrated and specific ownership is assigned, enterprises can collaborate and key stakeholders responsible for the customer experience can cohesively follow and respond to key moments in the customer journey.

The value of intelligent orchestration is in providing a system of record, with workflow and approval, that can see a campaign or communication conflict before it happens and avoid the negative consequences that it may cause with a customer. When all key stakeholders along the customer value chain are in sync on campaign coordination and workflow, they will avoid collisions that often occur from fragmented marketing and customer engagement functions that are focused and responsible for separate, individual actions along the customer journey.

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# 90%

of consumers start a task on one device and finish it on another.

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Google

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# 89%

of customer retention rating among companies with extremely strong omnichannel customer engagement, compared to 33% for companies with weak omnichannel customer engagement.

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Aberdeen Group

**SOLUTION: Integrated Cross-Channel Strategy and Platform**

As more enterprises opt for fact-based decision-making and personalized customer interactions, they're realizing the importance of enterprise collaboration in customer journey management and the urgency in making analytical-based real-time decision-making and interactions.

In such cases, the coordination of communications across all lines of business is essential. Consequently, they'll attempt to reshape their integration strategies for a bi-modal delivery model that will help them reach their growing requirements to connect seamlessly with mobile apps, the Internet of Things (IoT), and other digital channels. Finally, deploying a centralized, role-based interface from which stakeholders can visualize the customer journey and associated metrics will further enable enterprise collaboration to take hold.

**2. Act on Data in Real Time**

The move to real-time decision-making based on real-time data analytics leads to improved customer response, higher conversions, and increased revenue. The ability to collect data about customers in real time across their journeys and respond to key moments in real time is what separates successful brands from failing ones.

Such speed in response time requires enterprises to put data into action at a pace that matches the speed of the customer. Enabling intelligent next-best-actions requires the usage of a combination of advanced analytics, machine learning, robust analytic models, and decision management strategies to automate individualized interactions in digital channels at a massive scale.

Organizations that can easily design and implement dynamic omnichannel interaction strategies using an intuitive interface that combines context with inbound and outbound decisions will deliver a consistent brand experience at the right moment, through the right channel, and on the right device.

**CHALLENGE: Inability to Anticipate and Respond in Real Time to Customer Events, Conditions, or Variables**

Real-time analytics and responses are key for enterprises that want to enable intelligent orchestration, but many are hamstrung by insufficient data delivery mechanisms and lack of customer intelligence. This lack of customer information and data availability causes enterprises to miss nuances or changes in the customer journey and prevents them from responding in real time to customer events.

**SOLUTION: Use Big Data Techniques and Real-Time Decision Engines**

One of the biggest challenges organizations face today is to harness all the available sources of customer data at the speed, accuracy, and depth required to improve engagement relevancy through a much deeper understanding of the customer. Why? Because data is being generated in unprecedented volumes, velocity, and variety, yet organizations are challenged to ingest, correlate, analyze, and deliver data insights in the timeframe it's needed to drive real-time, data-driven engagements across both physical and digital touchpoints. meaningful impacts to campaign performance and revenue. New capabilities are needed to overcome fragmented engagement systems and data silos that make it difficult to leverage all data sources, in real time, to deliver the hyper-personalized experiences that customers expect across every channel and every interaction point.

Integrated solutions that unify data and apply statistical and machine learning algorithms to transform them into meaningful insights can easily recommend actions for customers to take. Enterprises that tap into this rich data, and apply deep learning and statistical analysis, can quickly gain a robust set of customer insights.

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"Marketing can't deliver a great customer experience independent of sales, service, and any other part of the organization, and your ecosystem, that impacts how a customer perceives your company and your products."

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**HANK BARNES**  
Research Vice President  
Gartner

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Only **7%**  
of the marketers  
surveyed can  
deliver.

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CMO Council Survey

Enterprises that can make real-time decisions can engage with customers in a segment- of-one manner: driving real-time personalization across all touchpoints, and delivering the brand promise with high contextual relevance. As today's customer journeys are continuous, dynamic, and real-time, organizations need an automated approach to in-line analytics that takes the next-best-action no matter what interaction point the customer may next show up in. This is in sharp contrast to traditional start/stop approaches that rely on a batch cadence, which is to ingest data, conduct analytics, and then use the results in some meaningful way – all of which creates latency that disrupts the seamless customer experience demanded by today's market.

### **3. Analyze Customer Data and Make Predictions About Behavior**

Real-time analytics and machine learning are capabilities that operate inline to customer engagement to help organizations determine who they are talking to, what they have done, what they are trying to do, and anticipates what they might need next. A next-best-action experience requires data and analytics to connect the right message, offer, and surrounding elements based on the context of an individual customer journey. But today, most analytics capabilities exist outside of the customer engagement engines that trigger and manage customer interactions. Traditional analytics solutions remain difficult to integrate into customer engagement flows, particularly dynamic or real-time flows, when they may require assistance. Predictive analytics is the use of data, statistical algorithms, and machine learning to predict the likelihood of future outcomes (buy more) based on historical data (purchase). Broadly defined, predictive analytics focuses on extracting features from data and building models that can predict future events, emerging as the key differentiator in the success of brands.

When enterprises move from understanding what has happened to customers to understanding why something happened, it becomes easier to fix problems and optimize performance as they orchestrate omnichannel customer experiences.

#### **CHALLENGE: Enterprise Data Issues Thwart Analytics' True Potential**

When organizations can predict and suggest the next actions to take with a customer, they can capitalize on revenue opportunities to increase share of wallet and customer lifetime value in the most efficient way. Predictive analytics are only as good as the data that is put into the model and the timeframe the analysis is done within. When a customer journey spans multiple interaction points across different customer engagement systems, organizations run the risk of delivering a wrong decision, message, or action based on siloed customer interaction data analysis. When analysis is done offline from customer interaction, predictive analytical models can suffer from data latency issues that prevent organizations from keeping pace with customers at optimal moments in the buying journey and accurately predicting customer intent.

#### **SOLUTION: Move to Analysis that Includes Statistical Modeling and Machine Learning**

As the quality and availability of an enterprise's data increases, so do the insights gained. Enterprises that can work across Big Data/Hadoop and traditional environments to integrate data and effortlessly migrate from data flow design to production at scale will more easily and quickly realize the full potential of their analytics efforts. They're more seamlessly integrated with multiple online and offline sources and give data access more readily available along a customer's value chain. This combination of integration and availability will improve enterprises' ability to predict future outcomes and help them realize the full potential of predictive analytics.

## 4. Resolve Customer Identities Across Channels and Engagement Systems

Traditionally, marketers have grouped their customers and prospects into a handful of segments based on demographics, psychographics, buying histories, and other meaningful variables. They often assign "personas" to these segments and deliver communications and offers that are targeted to these personas. Today, however, consumers want to be treated as a unique segment of one. In response, more marketers and customer experience leaders are moving beyond broad-based categories to create individualized, customized engagements – marketing to "the segment of one." That effort requires the ability to analyze all the relevant data and respond in real time to incidents and events as they unfold, when the buyer is in the moment.

Enterprises, therefore, need well-constructed communications that span departments, channels, and devices, are tailored to individual customers, and engage with them at key moments throughout their journeys. Such data-driven customer experiences are critical to the future growth and development of organizations.

### **CHALLENGE: Inability to Link Customer Data to Sources**

Companies can achieve "one version of truth" and link customers' cross-channel and cross-device identities, as well as their characteristics, behaviors, and transactional histories only when they can successfully resolve the different customer identities across data sources, devices, and engagement systems.

The first step in this insights-driven approach to customer engagement is uniquely identifying the customers, but a fragmented view of their data prevents enterprises from connecting their interactions as each system has its own convention for how it represents a customer's identity.

Most companies have multiple sources of data. These include transaction systems that track customer purchases (POS, eCommerce), websites, marketing automation systems, CRM databases, loyalty systems, mobile device payment methods, and numerous other data sets that track individual customer interactions within an organization. Oftentimes, this data sits in silos with little interaction or cross-pollination of information between databases. As companies become more inclined to run analytics projects, they often ask how to merge such data sets into a unified whole to create unique customer IDs.

### **SOLUTION: Create a Golden Customer Record Using a CDP**

The cornerstone of any data-quality initiative is identity resolution, starting with a golden record from core data entities that can be consumed by other areas in the organization. Enterprises that want to unify customer data to provide a complete picture of their customers should adopt a customer data platform (CDP). The CDP provides an always on, continuously processing golden record that enables an up-to-date and complete view of a customer across every interaction over their entire lifecycle. CDPs have been proven at scale, and are tuned to enable highly personalized customer engagement, unlike customer views that were created for other purposes such as ad targeting, reporting, data analysis, event processing, or big data storage that are not designed to meet the demands for precision, speed, and scale associated with real-time, omnichannel customer engagement requirements.

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**40.3%**  
said that better recognition capabilities for matching consumers across channels (identity resolution) would do the most to advance their organization's omnichannel marketing efforts.

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Winterberry Group and Data & Marketing Association (DMA)

<https://www.emarketer.com/Article/Many-Marketers-Recognize-They-Falling-Short-with-Technology/1014780>

## 5. Gather Unstructured Customer Data Across Channels and Devices

As noted in, "The Path to Omnichannel Marketing," connected data includes all data integrated from every source and structure, and linked from all touchpoints and throughout the enterprise. Having a connected data layer gives companies that single, unified view of the customer because it connects to first-, second-, and third-party data sources. This capability to integrate all unstructured data and sources enables targeted messaging and seamless engagements across digital and physical channels. Connected data will then become the foundation for personalizing digital interactions across the customer journey as companies succeed in transforming anonymous prospects into loyal brand ambassadors.

### **CHALLENGE: Siloed Systems, or Walled Gardens, Prevent Data Integration**

Despite the benefits of data integration, many enterprises struggle with data being spread across multiple customer engagement systems and databases. This has led to greater complexities due to the number of siloed systems and data stores. This redundancy results in companies using only a small fraction of available data for personalization. As enterprises augment and enhance their customer data, they're able to create progressive profiles that deepen not only their understanding of the customer (preferences, past purchases, trends and patterns, etc.), but also enables them to hyper-personalize engagements at critical moments and therefore deepen relationships with the customers.

Creating actionable, single views of customers across channels and devices requires integrated customer profiles. Integrating offline and online data won't occur if an enterprise operates with siloed systems or if its applications exist behind a walled garden. Without access to the various data sources scattered throughout an enterprise, companies lack cohesion to intelligently orchestrate omnichannel customer engagement.

This growing complexity of customer interactions often occurs because of disparate investment across lines of business in tools, applications, and technologies to manage the customer experience. These disparate platforms, solutions, and interfaces in their technology stacks prevent cohesive customer experiences across multiple channels. This results in the inability of many customer experience clouds and on-premises software today to integrate with a broader ecosystem outside of their walled gardens, including difficulty in connecting with enterprise sub-systems. Secondly, such siloed engagements on the enterprise side prevent data-exchange across lines of business. Customer interaction data must be readily accessible across the enterprise so that key stakeholders in the customer journey can learn and improve their own processes and interactions with customers.

### **SOLUTION: Deploy a Customer Data Platform with an Open Garden Approach**

Having the ability to respond in real time requires having the capability to capture data across all devices and channels, including those enabled by the IoT, and then respond in milliseconds. Companies therefore need one application to enable data quality and integration and avoid the mistakes and inefficiencies of handling data quality and data integration separately.

A single, integrated customer data platform (CDP) ensures consistent use and accessibility by creating a single point of control. This requires platforms architected with an open garden approach so they are able to operate seamlessly across hybrid data environments – including simultaneous access across traditional databases and Hadoop – and process any customer, product, device, financial, or operational data. This open approach empowers organizations to collect data from any source, cleanse and transform it, and gain immediate insight to share across the enterprise. ■

## 10 Actions of Intelligent Orchestration

- 1. Map the Customer Journey** – Align engagement activities to customer events and expectations.
- 2. Develop Segments of One** – Create rich customer profiles using virtually any data source, including first-, second-, and third-party sources.
- 3. Integrate All Forms of Customer Data** – A data management platform with open APIs will lessen the complexity of gathering first-, second-, and third-party data and enable an organization to create rich customer profiles regardless of whether the data is structured, semi-structured, or un-structured.
- 4. Unify Customer Identities** – Achieve a unified view of a customer by resolving identities across engagement and transaction systems through the creation of a golden record.
- 5. Apply Statistical Analysis** – Move from historical analysis to AI and machine learning to predict customer intent and optimize to meet objectives.
- 6. Generate Personalized, Real-Time Next-Best Actions** – Increase conversions by delivering triggered and transactional offers using a real-time decision engine.
- 7. Coordinate Your Messages Over Time and Across All Enterprise Touchpoints** – Gain the ability to understand the customer in the right cadence, context, and timeframe no matter what channel or interaction touchpoint they show up in next.
- 8. Leverage an Interaction Hub** – Connect easily with an ever-expanding array of communication channels: email providers, mobile messaging services, social media platforms, digital asset management systems, and Internet of Things (IoT).
- 9. Dynamic Customer Journeys** – Automate the journey stages that create the best opportunities for revenue, and reduce the risks of customer loss – bring together all the components to create dynamic customer journeys that are responsive to customer needs, preferences, and expectations.
- 10. Optimize Channel Mix and Attribution** – Create a closed-loop system that takes the guesswork out of channel attribution, enabling ongoing improvement in customer engagement and results.

## CHAPTER 2

# Bringing Intelligent Orchestration to Life

Redpoint Global helps organizations orchestrate intelligent omnichannel customer engagements across channels and devices by providing an innovative and scalable hub that connects data and insights with execution channels. By creating a seamless customer experience across the enterprise that combines advanced in-line analytics and real-time intelligent orchestration with precise customer views, companies are able to hyper-personalize omnichannel engagements to individual customers along their unique journeys, no matter the channel or device.

As the third technology layer in Redpoint's digital engagement solution, intelligent orchestration combines with connected data and in-line analytics to offer organizations the ability to aggregate data from all sources, technologies, and channels including the IoT, sensors, and devices. Intelligent orchestration allows companies to detect patterns and trends, pinpoint individual customer's preferences, and orchestrate the right customer engagement across all channels and devices at the right moments in the customer journey.

### 1. Intelligent Orchestration Starts With Connected Data

Operating on a highly integrated and accessible data layer creates true "omni-data" that crosses all data silos and barriers. This connected data includes all data integrated from every source and structure and linked from all touchpoints and throughout the enterprise. Having a connected data layer gives companies that single, unified view of the customer because it connects to first-, second-, and third-party data sources. This capability enables targeted messaging and seamless engagements across digital and physical channels. The output of connected data is an always-on, continually updated golden record that provides the single customer view as the critical foundation for managing, personalizing, and connecting digital interactions as companies succeed in transforming anonymous prospects into loyal brand ambassadors.

### 2. In-line Analytics and Machine Learning Recommend Next-Best-Actions

Machine learning and other advanced analytics make it possible to scale segmentation, and make predictive and prescriptive actions. Once organizations obtain that elusive, single omnichannel view of their customers, they must start applying advanced analytics to scale personalization to the segment of one. Whether automating an organization's predictive models into interaction flows or using a pre-defined library of machine learning capabilities, analytics are key to recommending the next-best-action and the exact targeted messaging to send. By finding patterns and making predictions from data and advanced analytics, machine learning methods turn digital channel behavior into new opportunities to tailor communications with customers and prospects over their full customer lifecycle.

### 3. Choose the Right Path with Intelligent Orchestration

Having the capability to orchestrate engagement across all touchpoints supported by advanced analytics will help enterprises coordinate, personalize, and automate real-time, omnichannel interactions. With the insights in hand to enable companies to take the next-best action, the subsequent step is to provide context that highlights where the engagements should take place, on which devices they would best be served, and the right moments to engage. It's now possible to orchestrate recommended actions seamlessly, not only across digital channels but also to offline and semi-digital channels as well through an open garden approach. This includes direct mail, contact center, and retail storefronts. Marketers are also able to orchestrate actions across the customer lifecycle at an enterprise level, across marketing, sales, and service touchpoints.

# Turning Data into Contextually Relevant Omnichannel Interactions

Redpoint's intelligent orchestration is the key to driving enterprise-wide customer engagement and delivering a customer experience across existing silos and all interaction channels. It meets the increasing customer demands to coordinate interactions across direct mail, email, web, SMS, mobile app, POS, ad tech, Internet of Things, the contact center, social, and any other touchpoint.

The Redpoint platform optimizes customer lifetime value, turning customers' deep understanding of their customers (through data) into highly contextual relevance at all points of interaction, in a hyper-personalized manner. Intelligent orchestration leverages advanced analytics to capitalize on a single unified view of customers and drive relevancy. This cumulates to greater customer acquisition, increased revenue per customer, higher retention rates, and lower costs of interaction.

## Summary

Growth in the digital age comes from engaging customers in a continuous dialog, using relevant, timely messages to interact with them through their preferred communication touchpoints, enabling the right enterprise business functions to engage customers at key moments, and creating compelling experiences that will keep customers actively engaged with a brand for the long term.

Customer experience is the new frontier for competitive advantage – brand reputation and success will depend on treating customers as individuals and applying insights to make their experiences both relevant and timely, understand their needs and wants, and deliver connected conversations before, during, and after their purchase. To keep pace, enterprises across all industries must intelligently orchestrate seamless experiences across all the individual channels and devices customers wish to use as they increasingly drive the experience. ■

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### About Redpoint Global

With Redpoint's software platform, innovative companies are transforming their customer experiences across the enterprise and driving higher revenue. Redpoint's solutions provide a remarkably unified, single point of control where all customer data is connected and every customer touchpoint intelligently orchestrated. Delivering more engaging customer experiences, highly personalized moments, relevant next-best actions, and tangible ROI—this is how leading marketers lead markets.

To learn more, visit [redpointglobal.com](http://redpointglobal.com).



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