

MEDALLIA

# EXP RINC

18

**THE LATEST CUSTOMER EXPERIENCE INSIGHTS AND RESOURCES  
FROM MEDALLIA EXPERIENCE '18**



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# Welcome

We're really excited to bring this e-book to you, which covers key takeaways from Medallia's Experience '18: exciting new products, solutions, and innovations as well as how our customers are using Medallia Experience Cloud™ to win through customer experience.



**Borge Hald**



**Amy Pressman**



An aerial night view of a city, likely Tokyo, showing a dense cluster of skyscrapers and a complex highway interchange. The scene is illuminated with a strong blue and purple color palette, with warm orange and yellow lights from the buildings and the highway interchange providing contrast. The text 'Chapter 1' is overlaid on a cyan bar in the lower-left quadrant.

Chapter 1

# CX TIPPING POINT

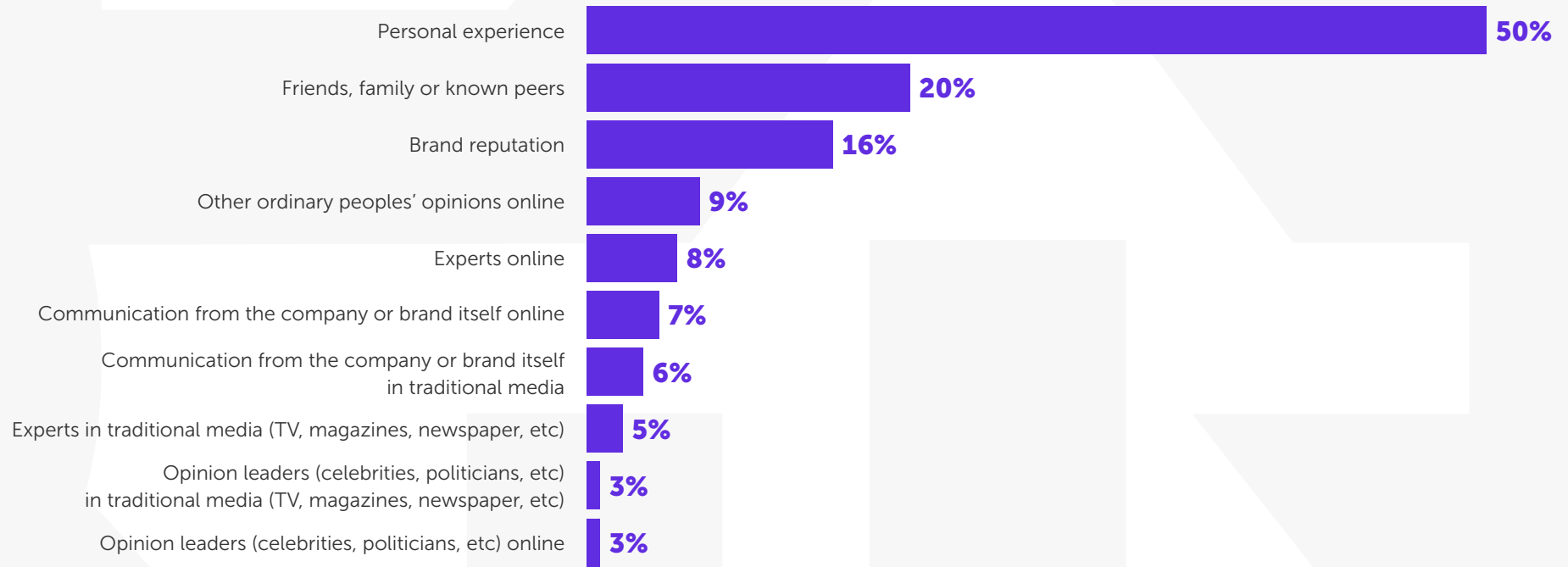
“Companies can no longer rely entirely on the strength of their products and advertising to sustain a positive brand reputation.

Instead, they must devote sustained effort to ensuring that each customer interaction is a positive one, and to correcting problems that arise in these interactions.”

*Source: The Customer Experience Tipping Point: An Ipsos + Medallia Study*

# The Customer Experience Tipping Point

Personal experience has the most influence on decisions to choose, or continue to use, brands in the future



Percent of respondents who rated each item 9 or 10 on a 10-point scale where 1 is "definitely would not influence" and 10 is a "definitely would influence".

Medallia partnered with Ipsos on a global consumer survey that yielded insights on how companies can meet or exceed customer expectations in the coming year and beyond.

[Download The Customer Experience Tipping Point — An Ipsos and Medallia Study here.](#)

# Customers Expect Ease and Convenience Every Step of the Way



**24%**

of customers expect  
**checkout free shopping**  
to be available



**35%**

of online retail consumers expect to have the  
**option to chat with a live agent**



**24%**

of online retail consumers expect  
**same day delivery**



**49%**

of offline shoppers expect  
**consistent levels of service**  
across physical and digital channels



**30%**

of customers expect call center agents to be instantly  
**familiar with their contact history**



**56%**

of online retail shoppers expect  
**consistent levels of service**  
across physical and digital channels

Source: [The Customer Experience Tipping Point. An Ipsos + Medallia Study](#)



“Customer experience through the entire journey with your brand is actually your most important product. It has to be monitored, understood, and managed exactly like a product.”

**Borge Hald, CEO, Medallia**



## Creating a Culture of Client Care

**“Wherever, however, our customers choose to interact with us – we have to be true to our core purpose.”**

Bank of America has a purpose of helping make the financial lives of its customers better with every connection. In 2017, they went through a major undertaking to lift the CX culture of their whole company – over 250,000 employees worldwide.

After seeing an opportunity to empower and motivate their teammates – they launched Bank of America Voices, which illuminated the connection between the Bank of America employees and Bank of America customers. Now, employees and leadership can see first-hand how their interactions affect clients and how they’re personally responsible for serving their core purpose of making the financial lives better for their clients.

**“This is going to be a differentiator for us. It already is.”**



[WATCH THE KEYNOTE](#)

**250K+**  
employees  
worldwide

**47M+**  
consumer clients  
worldwide

**35M+**  
online accounts

**25M+**  
mobile users

**60M+**  
daily interactions  
with consumer clients



Expy Award Winner: Transform Your Company, 2018

## Scaling to One

**“At Comcast, we’re good at taking one thing and scaling it to a lot of people; we weren’t good at taking the data about the customer and scaling it down to the one, single interaction.”**

Comcast is an American global telecommunications company – the largest broadcasting and cable television company in the world. Knowing the digital transformation was upon them, they seized the opportunity to infuse digital into the way they did business and the products they sold.

Comcast shifted their interaction model to one where they spent more time educating the consumer and fine-tuning the product to work harder – infusing CX into the master design. They launched an AI system, a CX layer, and a ‘direct-to-consumer’ radio line that showcased the magic of the digital-human handoff. Agents were able to use the right data to have smarter conversations when there was a need to talk directly to the customer.

**“In this day and age, you have to empower the frontline to be agile and make the right decisions – not follow the right rule.”**



[WATCH THE KEYNOTE](#)

Net Promoter, Net Promoter System, Net Promoter Score, NPS and the NPS-related emoticons are registered trademarks of Bain & Company, Inc., Fred Reichheld and Satmetrix Systems, Inc.

**80K**  
employees, or  
'practitioners of NPS®'

**15x**  
reduction in  
social media response time  
(from days to minutes)

**50M+**  
real time messages

**1M+**  
CX call backs  
using the Medallia system

**60M+**  
daily interactions  
with consumer clients



# The Tipping Point: Experience Defines Brands

Customer experience has always been important for business. But advancements in technology and empowered consumers have created a tipping point, where customer experience has become a company's make or break moment.

At Medallia, we've been building and operating an enterprise-grade Customer Experience platform for a long time, and our goal has remained the same: make it easy for businesses to win through customer experience – where they can **engage every customer, activate every employee, and optimize every experience.**

For those who want to retain and attract people to their brand, and build lasting affinity for their company, experience is king. The time to win is now.



**WATCH THE OPENING KEYNOTE**



Chapter 2

# ENGAGE every customer

“The more you engage your customers, the more you learn about them. The more you learn about them, the more you can anticipate their needs instead of reacting to their needs.”

**Borge Hald, CEO, Medallia**

# Why it Matters to Engage Every Customer

The more that companies listen to customers, the more likely they are to improve CX.



**+10%pts**

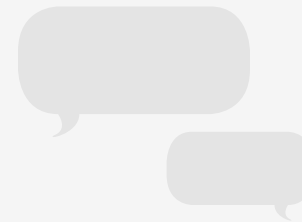
Collect feedback survey across multi-channels



**+15%pts**

Collect social media/online reviews for feedback

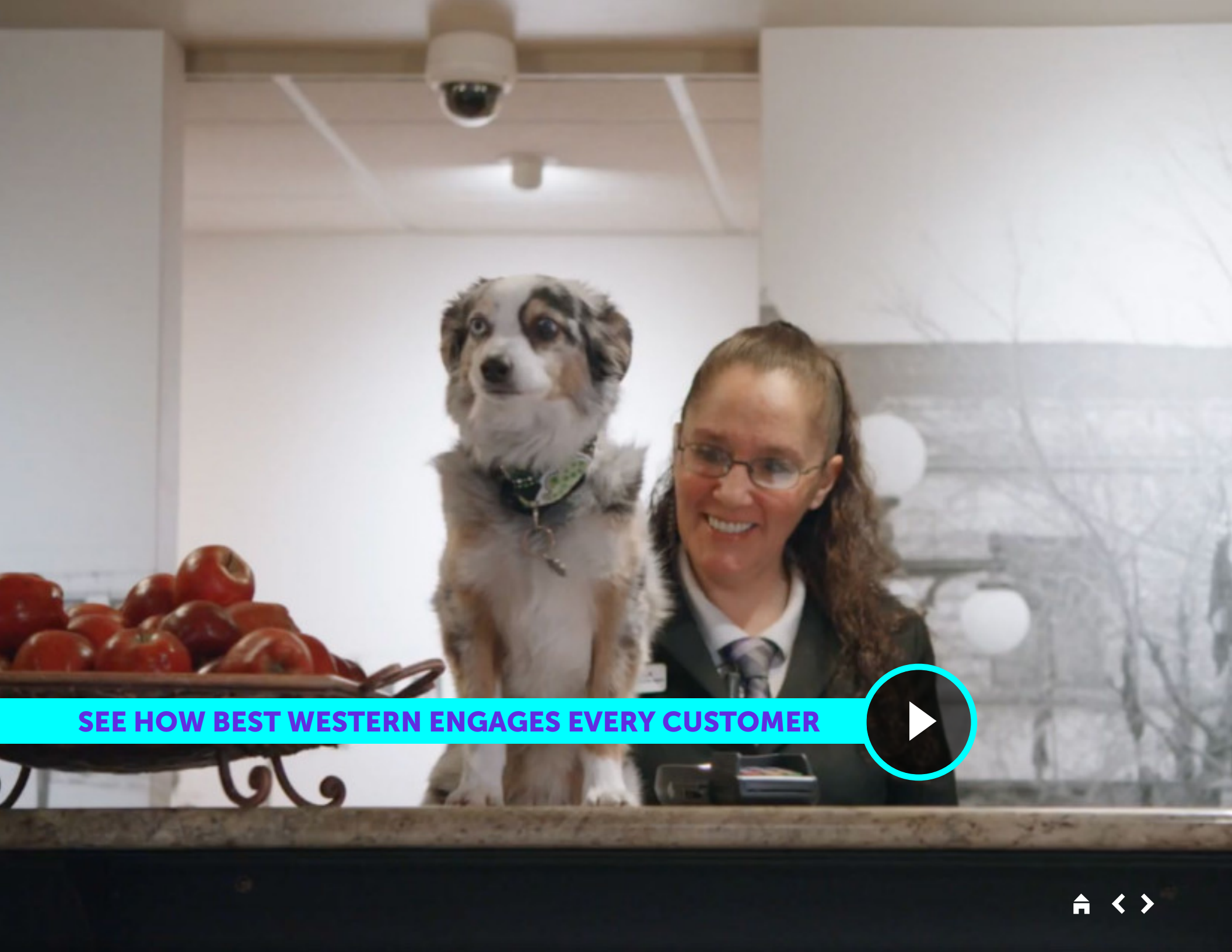
When companies follow up with customers they see dramatic improvements.



No response to feedback

NPS<sup>®</sup> improves  
**+38%**  
Responds to all or most feedback

 [VIEW STATE OF CX INFOGRAPHIC](#)



**SEE HOW BEST WESTERN ENGAGES EVERY CUSTOMER**



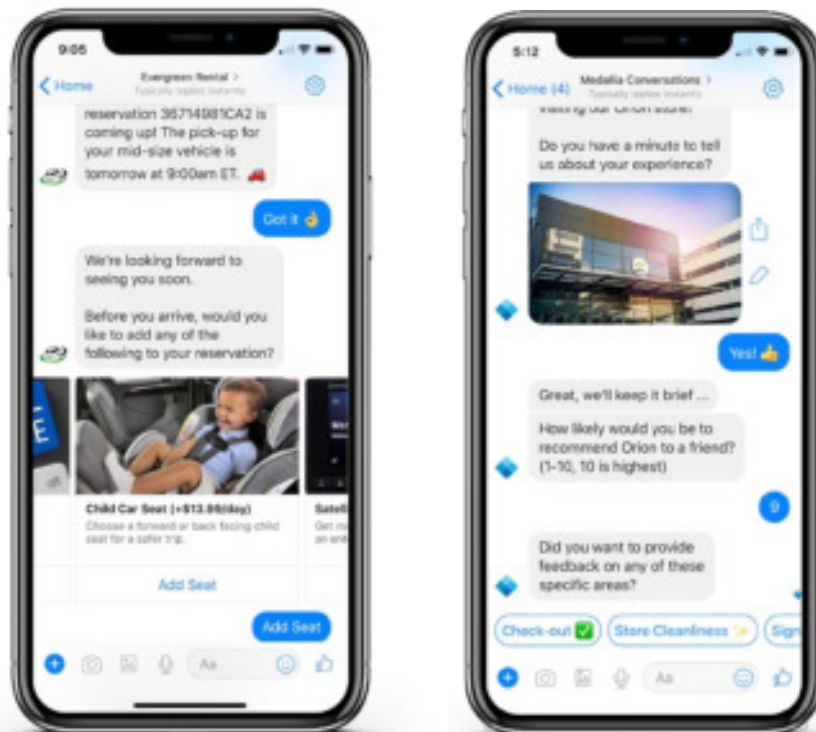


# Medallia Conversations™

Engage your customers like you never have before

Mobile messaging has hit critical mass as a communication channel, with over 5.8 billion monthly active users worldwide across all messaging apps.

Medallia Conversations™ lets you take advantage of the growing popularity of mobile messaging by enabling your customers to provide in-the-moment feedback through SMS and popular messaging apps, such as Facebook Messenger.



**NEW** Available Fall 2018

## Engage Customers in the Moment

Allow customers to provide feedback wherever they are, across multiple messaging channels.

## Offer Adaptive CX Feedback

Let customers provide feedback that is important for them, with the ability to choose between different topics.

## Influence the Experience

Go beyond feedback collection by creating interactions that enhance and become a part of the customer's experience.

 [WATCH THE VIDEO](#)

 [WATCH THE PRODUCT KEYNOTE](#)

[Learn More Here](#)

# VoC Anywhere™

## Improve CX through Connected Devices Feedback

The widespread adoption of connected devices presents companies with interesting opportunities to engage with customers in ways never before possible.

By expanding CX engagement to connected devices with VOC Anywhere, companies can enhance customer relationships by gathering real-time feedback and interacting to improve experiences directly through any internet-enabled product.



**NEW** Available Fall 2018

### Engage Customers Anywhere

Segment and collect feedback through any internet-connected device or platform, no matter where your customers are.

### Humanize the Digital Experience

Unify feedback with machine-generated device data to drive automated device improvements, operational efficiency, and personalized services.


### Enable Self-Service Administration

Centrally build survey design, content, and targeting logic, applied in real-time within connected devices, to reduce IT burden and enable rapid CX innovations.



[WATCH THE PRODUCT KEYNOTE](#)



A photograph of Theresa McLaughlin, Global CMO of TD Bank, speaking on a stage. She is wearing a dark blue dress and is gesturing with her hands. The background is a large screen displaying a blue graphic. The image is partially obscured by a diagonal blue overlay on the left side.

“Customers expect amazing,  
relevant, contextual  
experiences all the time.”

**Theresa McLaughlin, Global CMO, TD Bank**

# Enabling Customer Engagement

## Medallia Launches New Category of Digital Partners

Medallia partners with leading digital & analytics agencies, bringing decades of experience in customer engagement conversion rate optimization and digital marketing to bear on the digital customer journey. Digital agency partners augment their quantitative analytics practices with qualitative methodologies from Medallia for Digital.




Chapter 3

# **ACTIVATE** every employee

“Employees have the power to drive change at your organization. They interact with your customers, and build, sell, support everything you offer them.

For your organization to win through customer experience, your employees have to win through customer experience all day, every day.”

**Borge Hald, CEO, Medallia**



“If the associates take care of the customer and you take care of the associates, then everything else takes care of itself.”

**Brendan Baby, Director of Customer Strategy and Insights, Home Depot**

# Why it Matters to Activate Every Employee

When companies empower employees with customer feedback they do better.



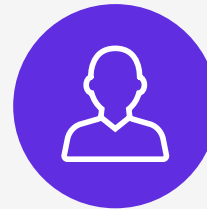
**+9x**  
**innovations**

when companies share customer feedback with employees across the organization



[VIEW STATE OF CX INFOGRAPHIC](#)

More and more employees connect with customer feedback in real-time.



**5.2M**

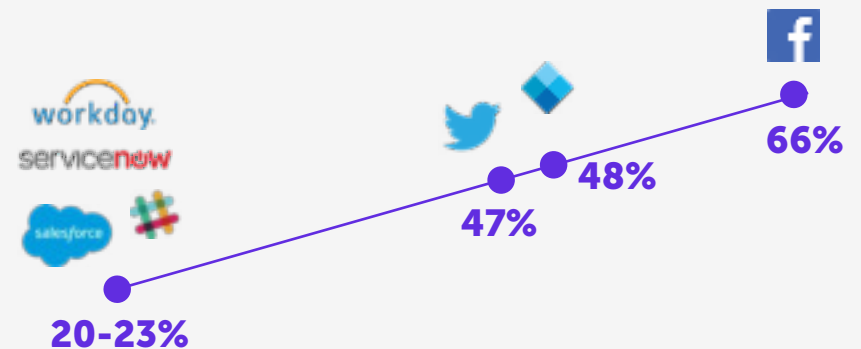
Medallia users



**56%**

of Medallia programs have 1,000+ users

**Medallia Mobile Daily Active Users**



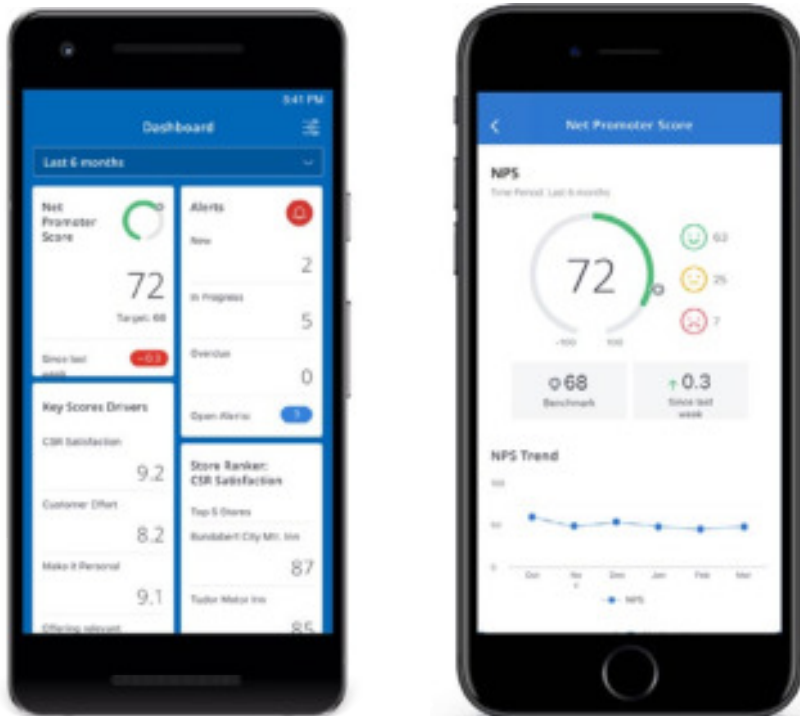


# Medallia Mobile 3.0

## Put the voice of the customer in the palm of your hand

Medallia Mobile allows employees to listen and act on feedback, no matter where they are. With customer experience insights at their fingertips, Medallia Mobile drives customer engagement and makes delivering great experiences a habit.

The latest version of Medallia Mobile provides powerful role-based dashboards to help every employee align with your organization's most important customer experience metrics. Users can also view individual customer feedback and see the full context of the response, as well as any associated case management activities.



**NEW** Available June 2018

### More Powerful, More Personal

New role-based dashboards provide key CX metrics for each user; improved workflow actions accelerate closing the loop on customer issues.

### Seamless across Medallia

Built using the new Medallia Alchemy design system, visualizations and actions are consistent across Medallia's mobile and web apps.

### Enterprise Ready

Comprehensive capabilities to ensure secure access, with support for Single Sign-On and Enterprise Mobile Management platforms.

 [WATCH THE VIDEO](#)

 [WATCH THE PRODUCT KEYNOTE](#)

[Learn More Here](#)



**SEE HOW H&R BLOCK ACTIVATES EVERY EMPLOYEE**

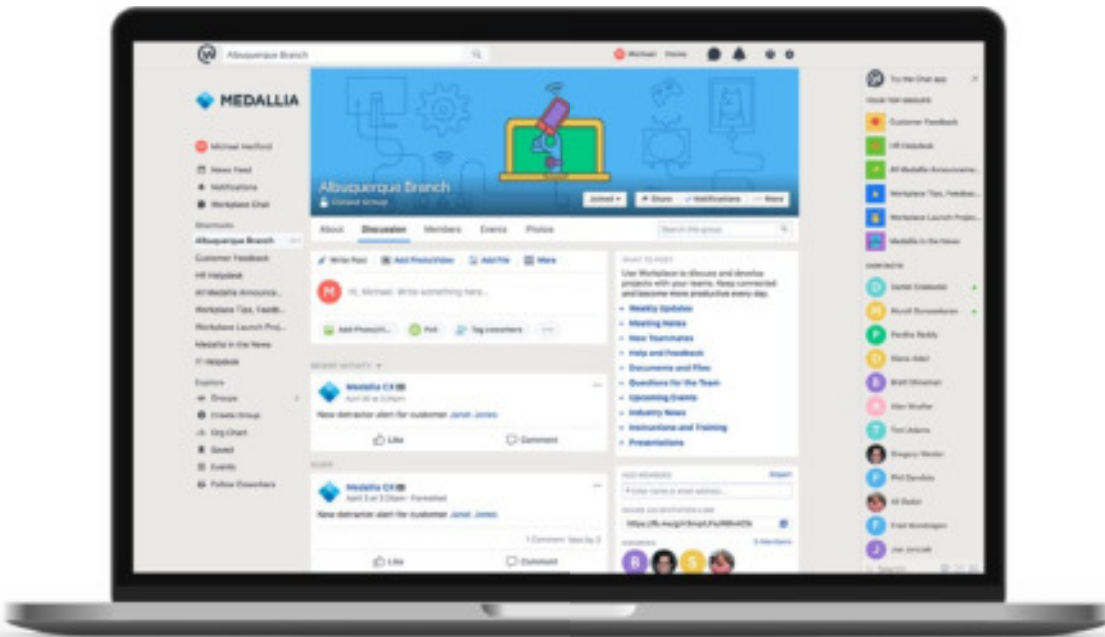


# Medallia + Workplace by Facebook

## Collaborate to Improve the Customer Experience

Today's global workforce needs CX feedback and insights within its enterprise collaboration solution, putting the customer at the forefront of the company's daily operations.

Medallia is the only customer experience management platform integrated into Workplace by Facebook empowering businesses to activate employees and drive real-time collaboration and accountability across the company.



**NEW** Available June 2018

### Leverage the Power of Teams

Discuss customer issues in a shared forum to find the best resolution for closing the loop.

### Amplify the Voice of the Customer

Increase employee participation and engagement with customer feedback by making it more visible.

### Find Recurring Experience Issues

Categorize feedback to identify areas for improving processes and experiences.



**WATCH THE PRODUCT KEYNOTE**

[Learn More Here](#)

# Enabling Employee Activation

## Bain CX Solution for NPS® powered by Medallia

Medallia and Bain & Company have partnered to build a solution based on the Bain Net Promoter System framework that is proven to deliver sustained growth through CX transformation.

Bain Customer Experience Solution for NPS® powered by Medallia combines real-time voice of the customer (VoC), voice of the employee (VoE), and operational data with support for custom roles enabling each employee to focus on the data and the actions relevant to them.

Medallia Experience Cloud is specifically configured to support all elements of the framework including inner loop, outer loop and huddles. Complemented with a team of Bain consultants, the solution has delivered a proven approach to accelerated CX transformation.



### NPS FEEDBACK®, LEARNING AND IMPROVEMENT

Bain & Company  
Proprietary

Element of the Bain NPS  
framework are supported  
within the solution



[Learn More Here](#)

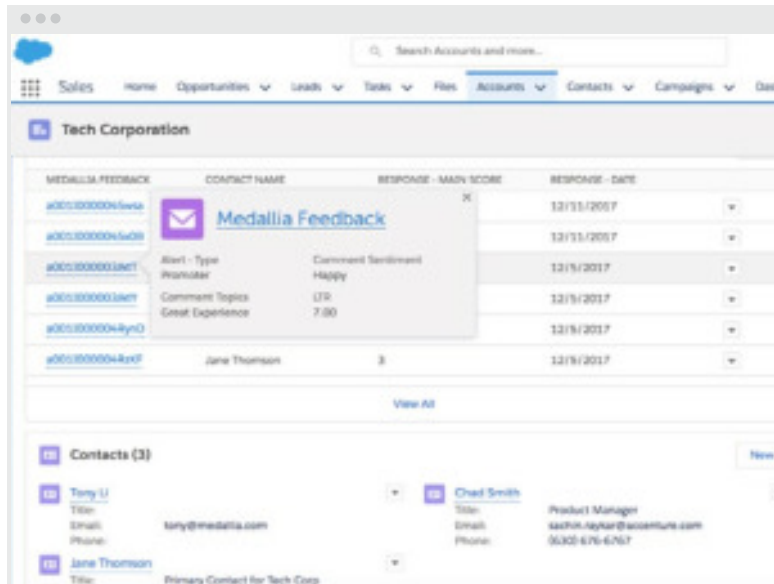
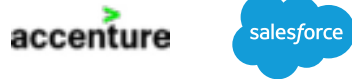


# Enabling Employee Activation

## Accenture Customer Experience Solution for Salesforce powered by Medallia

By integrating customer experience management with CRM, sales and customer service teams can have direct access to the voice of the customer and act on the customer feedback and sentiment within the CRM tool.

Our jointly developed solution integrates operational data from Salesforce Sales Cloud and Service Cloud with CX data from Medallia Experience Cloud. This 360-degree view of the customer creates unparalleled insight to personalize and optimize sales activities for opportunities and improve service experience for customers.



 **WATCH THE VIDEO**

[Learn More Here](#)






Chapter 4

# OPTIMIZE every experience

“If you optimize every experience for every customer in their journey, you’re more likely to win their love and loyalty. To do it at scale, you need one platform – running on machine learning and AI – to learn faster and grow bigger from all the customer data.

Then, you can empower your employees with actionable insights, so your entire organization can act with certainty and clarity, and your relationships with your customers will be more rewarding.”

**Borge Hald, CEO, Medallia**



“Customers are getting the exact experiences you either intentionally or unintentionally designed for them.”

**Tiffani Bova, Global Customer Growth and Innovation Evangelist, Salesforce and Author of *Growth IQ: Get Smarter About the Choices that Will Make or Break Your Business***



# Why it Matters to Optimize Every Experience



## 4 of 5

Medallia CX programs systematically identify and address root causes of customer problems, and they are...

## +42%pts

more likely to innovate new products & services



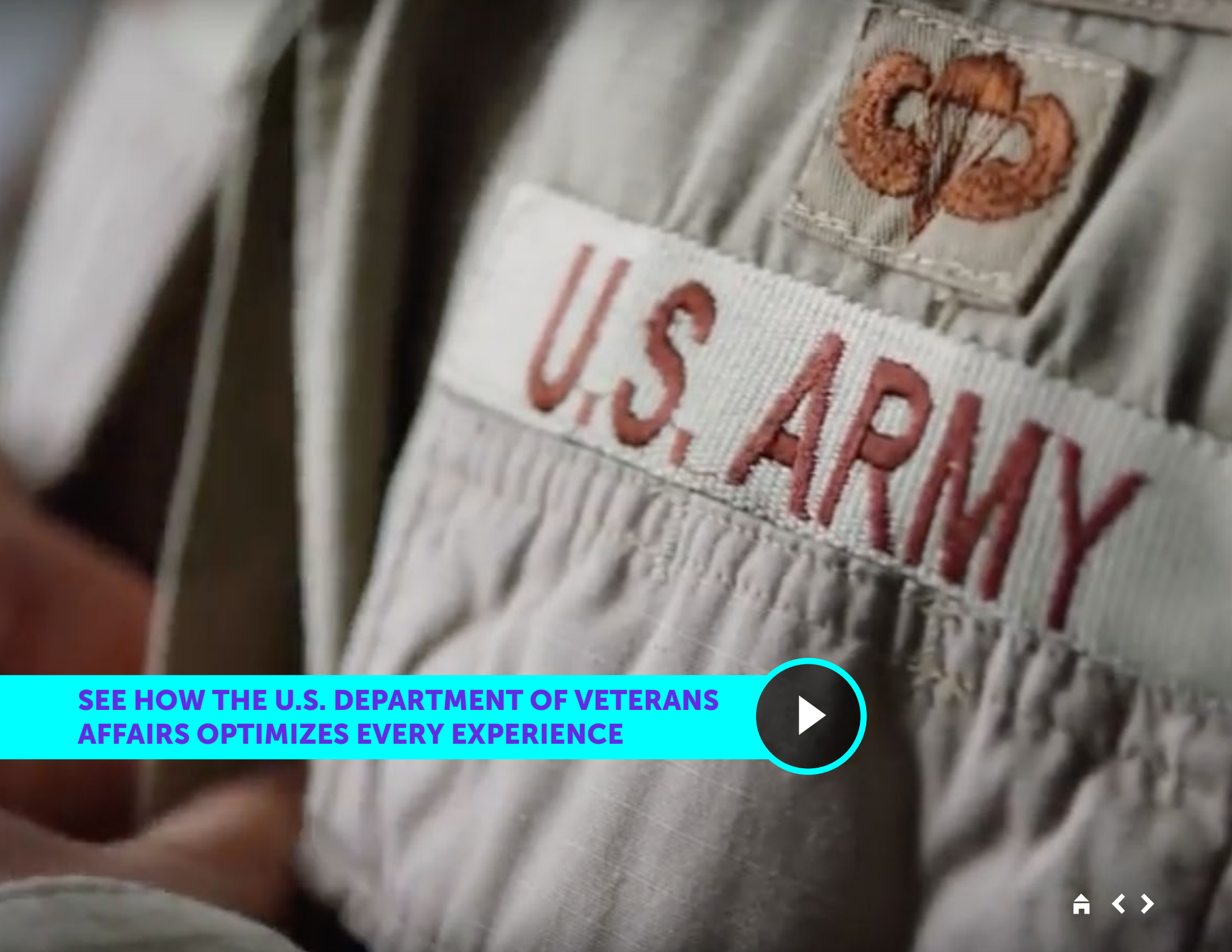
Companies are

## +22%pts

more likely to **improve CX** when they analyze **unstructured feedback**



[VIEW STATE OF CX INFOGRAPHIC](#)



**SEE HOW THE U.S. DEPARTMENT OF VETERANS AFFAIRS OPTIMIZES EVERY EXPERIENCE**

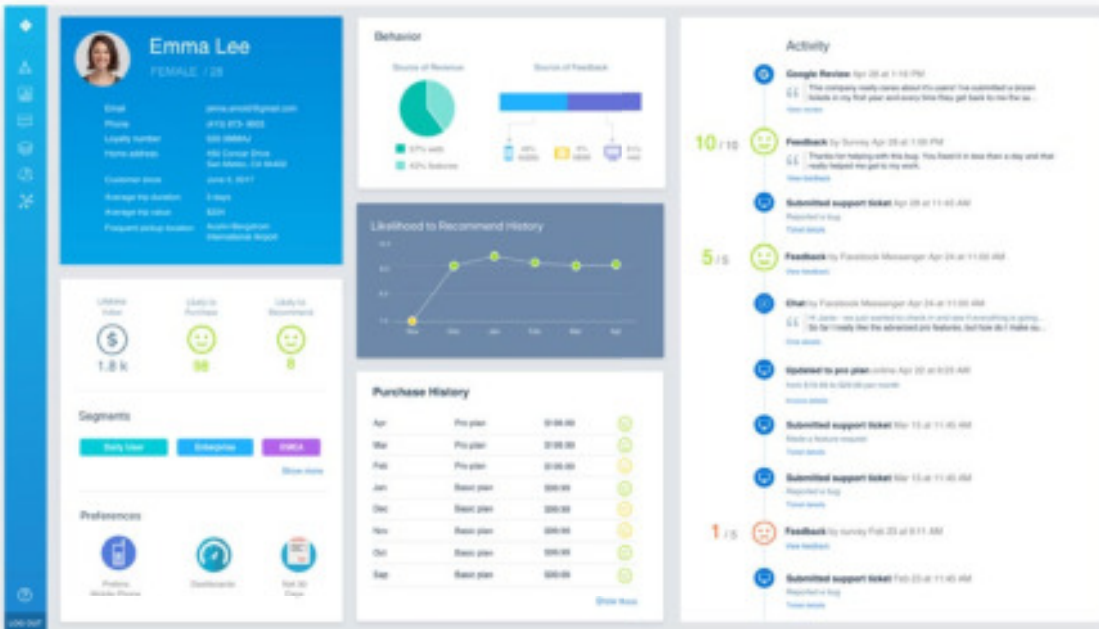


# Experience Data Platform (XDP™)

Gain a complete, accurate, actionable view of your customers

A key challenge for improving customer experiences is understanding each customer's journey across multiple touchpoints and channels, many of which have disconnected information silos.

You need a unified "system of record" that brings together experience data from any data source, connecting the dots to gain deep insights into experiences along each customer journey. With XDP, you can construct experience profiles for every customer, and then run sophisticated analytics to understand, anticipate and optimize interactions.



NEW Available 2019

## Get a True 360-degree Customer View

Unified view of a customer and all their interactions to drive personalized experiences.

## Improve Customer Insights

Create relevant and targeted segments to track, compare, and analyze the behavior of customer cohorts over time.

## Optimize Customer Journeys

Visualize and analyze customer behavior across touchpoints to optimize journeys and predict future behavior.



WATCH THE PRODUCT KEYNOTE

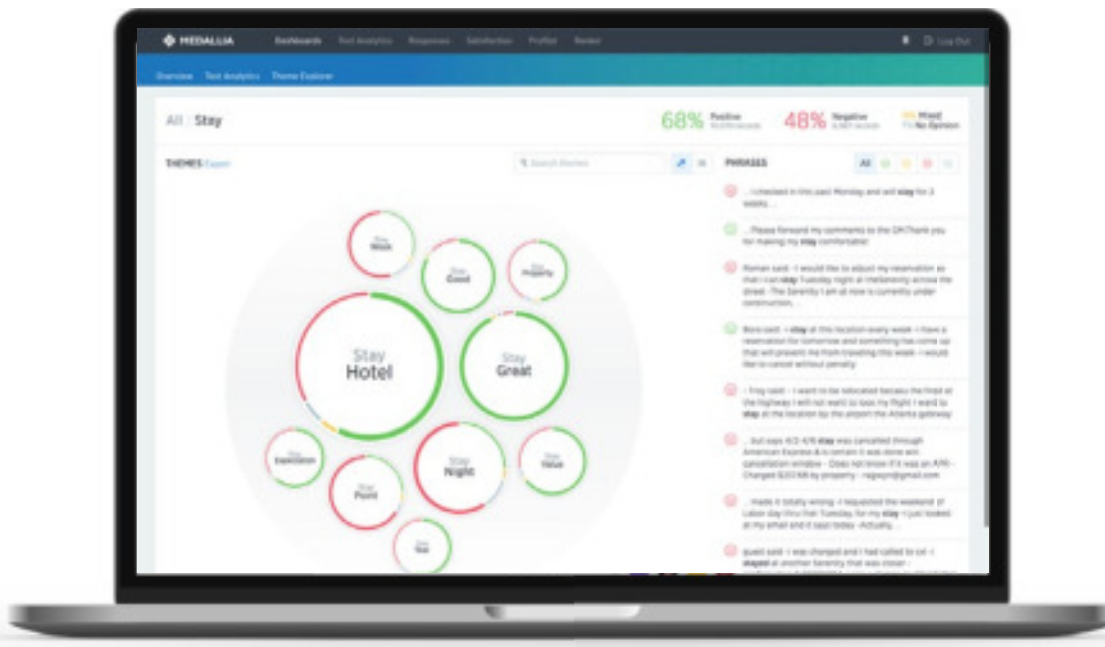


# Medallia Athena™

## Actionable and Adaptive AI for Your CX Programs

Artificial intelligence (AI) represents the forefront of innovation in customer experience management with new technology that gives companies the power to both understand and optimize customer experiences at scale.

With Medallia Athena, companies can leverage AI and machine learning to make smarter, more informed decisions on how they engage with customers and deliver great experiences based on deep, guided insights.



**NEW** Available Today (Medallia Text Analytics)

### Collaborative Automation

Guided assistance throughout the Medallia Experience Cloud, from program definition, through CX interaction design, to channel selection and sampling.

### Built for Action


Combines human and machine intelligence to discover and recommend high value actions and focus employee attention where it matters most.

### Always Improving

Machine learning capabilities continually adapt and improve based on new feedback, associated customer data and usage patterns.

 [WATCH THE VIDEO](#)

 [WATCH THE PRODUCT KEYNOTE](#)



“Our team takes to heart a desire to create solutions that help every company build more rewarding relationships with their customers.

We aim to make it easier to answer: How do your customers feel throughout their journey with your brand, and what can you do to win their love and loyalty?

We know that is exactly what drives results.”

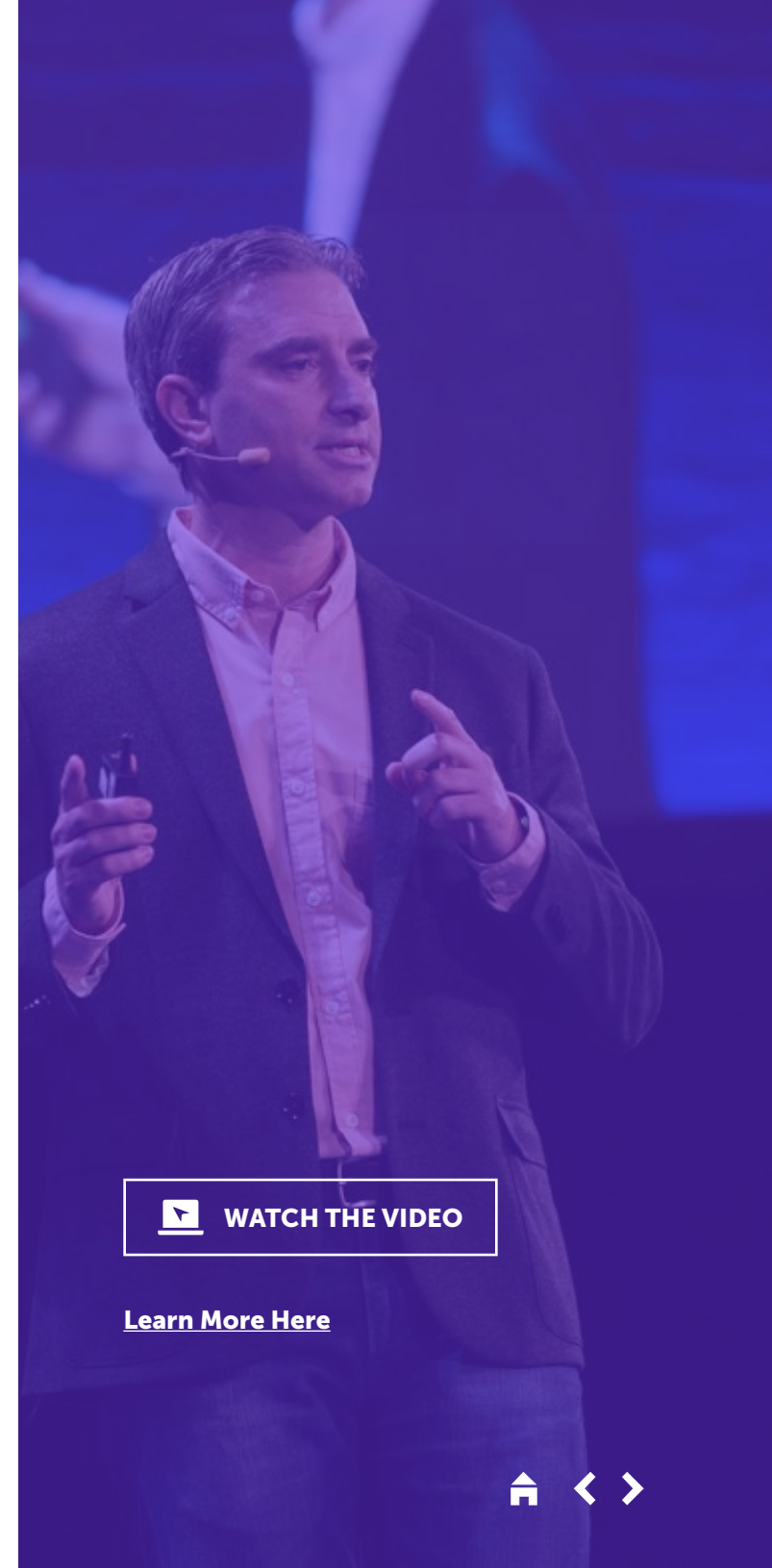
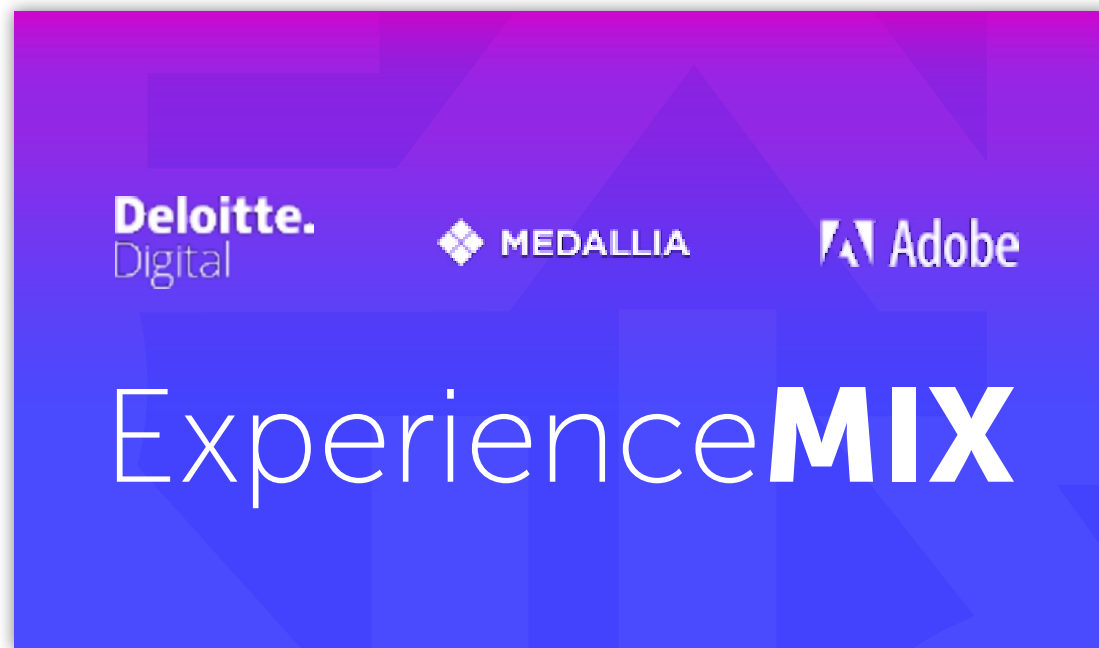
**Krish Mantripragada, Chief Product Officer, Medallia**

# Enabling Experience Optimization

**Introducing ExperienceMIX — Delivering personalized, contextual experiences to create fiercely loyal customers**

**A jointly developed solution by Deloitte Digital and Medallia**

ExperienceMIX integrates Medallia Experience Cloud with Adobe Experience Cloud to enable organizations to easily harness CX and emotional data to run more personalized campaigns at scale. Our solution is designed to integrate customer experience management with marketing automation, customer segmentation and campaign targeting to create unique interactions that leverage smarter omni-channel messaging automation.



 [WATCH THE VIDEO](#)

[Learn More Here](#)

EXPLY  
AWARDS

Chapter 5

# Awards



# Experience Champion of the Year

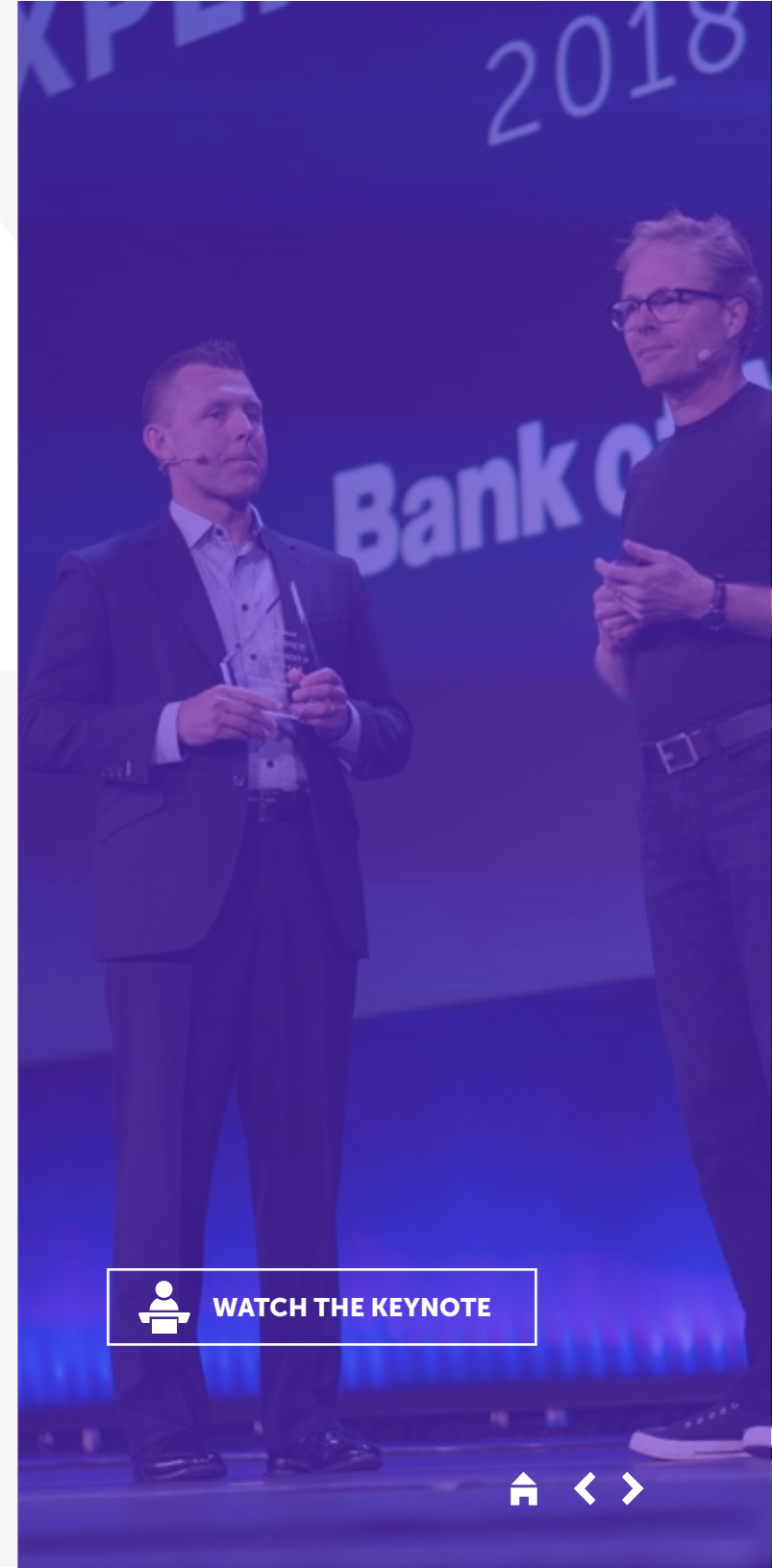


## This year, Medallia is proud to recognize Bank of America as Experience Champion of the Year.

The “Medallia Experience Champion of the Year” award recognizes an entire organization within the Medallia community whose contributions and leadership across their organization exemplifies the values of an Experience Champion.

The winning organization is chosen by Medallia leadership as a role model to the community on how to be “all in” on the customers they serve, as well as the investment in their own employees’ growth and development to create more meaningful customer experiences.

Bank of America’s program is differentiated by its true omnichannel program touching every line of business, massive integration of operational data in a centralized, action-oriented system, partnership with Medallia in developing new cutting-edge CX functionality in the system, and the company’s “all-in” commitment to customer centricity, from executives to the frontline.



 WATCH THE KEYNOTE





# EXPY Awards

## Companies entered in any of the four categories:

### Engaging Every Customer

Effortlessly connect with your customer at any touchpoint to understand their experience and improve their relationship.

### Activate Every Employee

Drive real-time collaboration and accountability across the company by personalizing data, insights, and workflows for every employee to action.

### Optimize Every Customer

Model and instrument every touch point and journey to systematically measure, analyze and improve every experience.

### Transform Your Company

MEC is the only enterprise grade platform that can wire your entire organization to systematically drive action and win on customer experience. Leverage Medallia's expertise, best practices and ecosystem to accelerate your time to value and become a customer experience leader.

## A panel of external industry experts and Medallia thought leaders judged entries based on:

- Impact on business metrics
- Impact on the customer experience evidenced in feedback
- Impact on organizational culture and operations
- The X factor, including inventiveness and relevance to the industry

EXPY  
AWARDS

# EXPY Award Winners

## IBM

### Engage Every Customer

IBM's use of customizable, self-service models and predictive analytics helped them connect with customers more effectively, at massive scale and with massive results across the business.

## Future Generali

### Optimize Every Experience

Future Generali India Insurance used customer feedback to reimagine each major experience touchpoint along the customer journey, from purchase to ongoing support and services, and to drive strategic change across their organization.

## Sage

### Activate Every Employee

Sage initiated a large scale, global B2B rollout of a customer experience program that saw thousands of employees plug into the Medallia platform and refocus their efforts on making customer experience improvements.

## Comcast

### Transform Your Company

Comcast's commitment to building a culture completely oriented around the customer, from the frontlines to executives, is exemplary of winning with experience. It's led to both a massive lift in performance across the business, and just as crucially, a lift in perception of what interacting with a telecom company should be like.



[FIND OUT HOW MEDALLIA  
WORKS WITH THE WORLD'S  
BEST-LOVED BRANDS](#)

# Hear What Winners Have to Say

## IBM

"Our customized self-service approach to CX offers the flexibility to provide support around more than 300 product offerings and reach a level understanding of every customer, even those who aren't actively engaged in providing feedback, and often in advance of interactions through predictive analytics."

*Kathy McGettrick, VP Market Development & Insights, IBM*

## Future Generali

"We've successfully implemented and adopted the Generali Group NPS Program to create a differentiated experience for customers, to lean on customer insights to make each touchpoint better, and to grow our business based on the interactions customers have with Generali across the automotive and health insurance businesses."

*Hari Shankar Mishra, AVP Customer Service at Future Generali*

 **LEARN MORE**

## Sage

"To develop the best possible experience requires that everyone in our organisation has a deep understanding of customer demands and pain points, from executives to frontline contact centre employees. Putting in place a structured approach to gathering and utilising real-time feedback has created a major cultural shift, sparking positive changes to the business."

*John Patterson, VP Customer Experience at Sage*

## Comcast

"Comcast is focused on creating great experiences for our customers and employees by placing their feedback at the center of everything we do. Our customer-centric culture is empowered by the real-time feedback we receive from customers and employees through the Net Promoter System and Medallia solution. This information helps us make the operational, technical, and process improvements needed to continuously improve our customer's experience."

*Graham Tutton, VP NPS Operations at Comcast*



# Become an Experience Champion

“Great companies are great,  
because they focus on what  
they need to do in the future.”

**Bruce Temkin, Temkin Group, Inspiring CX Innovation Breakout Session**

# Become an Experience Champion

## Demonstrate CX Impact

- The Total Economic Impact™ Of Medallia Experience Cloud >
- A CX Leader's Guide to Demonstrating Economic Value >
- Financial Linkage: Demonstrating CX Value to the CFO >

## Drive Culture and Accountability

- You Say You Want a Revolution: Build a Customer-Centric Culture >
- The Business Case for a Customer-Centric Culture >
- The Missing Piece of the CX Puzzle: Customer-Centric Employees >

## Evolve Your CX Program

- From Data to Action: Profiling the Modern Insights Team >
- Why Text Analytics? What Every CX Professional Needs to Know >
- Harness Digital Insights to Grow Your Entire Enterprise >

## Learn How to Innovate

- Breaking the Code – Customer-Driven Learning and Innovation >
- Innovation at Scale – Turning Size into an Advantage for Customer Experience Innovation >
- The Big Story Behind Your Big Data – Six Practices for Making an Impact with Text Analytics >

## Enhance Your Skills



BECOME OCEM CERTIFIED

## Extend Your Network



JOIN THE CXPA

## See Where You Are in Your CX Journey



TAKE THE CX MATURITY ASSESSMENT

# Medallia Partners With You All The Way

 **accenture**

**Deloitte.**  
Digital

**BAIN & COMPANY** 

  
**pwc**

**Clicktale**<sup>®</sup>

 **commonfont**

 **GENESYS**<sup>™</sup>

 **Ipsos**

**Ipsos Loyalty**

**LRWCX**



**WORK WITH A MEDALLIA PARTNER**



**BECOME A MEDALLIA PARTNER**



FROM ALL OF US AT MEDALLIA

# Thanks for making Experience '18 memorable

Medallia is ready to meet you where you are on your CX journey. Our industry and technical expertise is unmatched, so we can help you easily take your CX programs to the next level.

We hope to see you next year!

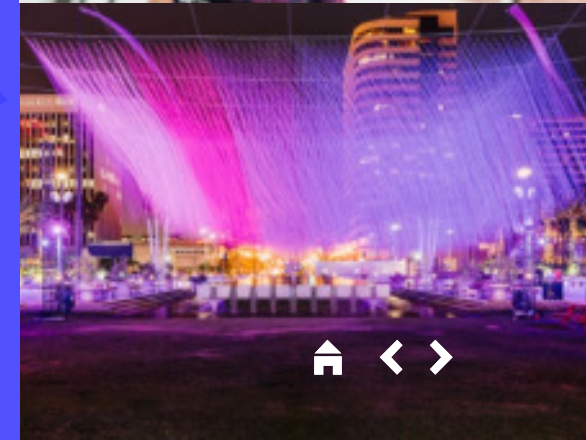


SAVE YOUR SPOT FOR EXPERIENCE '19

For a demo or to learn more



TALK TO OUR TEAM





MEDALLIA

# RINC EXP

18

Want to learn more?

 CONTACT US

