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Why customer experience is the key to thriving in uncertain economic times

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RSM

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WHY CUSTOMER EXPERIENCE IS THE KEY TO THRIVING IN UNCERTAIN ECONOMIC TIMES

February 28, 2023

Agenda

- What you will learn
- Introductions
- Human-centered experience management
- Why organizations need OCEM
- Demonstration of customer experience solution
- Questions and answers
- Closing

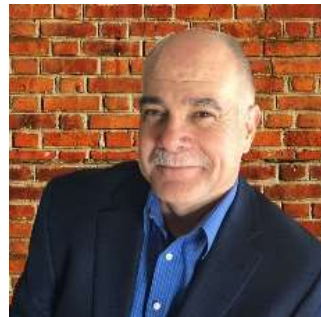
Presenters



Tabitha Daugherty

Manager, Human-Centered Design, RSM

Tabitha leverages her extensive research background and understanding of human behavior to develop innovative solutions that will optimize outcomes and transform the customer experience.



Ron Giblin

Customer Experience Solution Consultant, RSM

Ron exercises business and technical acumen in customer-facing roles, allowing him to collaborate with diversely skilled members of the customer's organization to design and create solutions.



Casey Levine

Senior Director, Medallia

Casey has led Fortune 500 companies on technical solution design and architecture for over a decade, helping these organizations to transform the experiences of their customers and employees with best-in-class technology.



Paul Duckworth

Customer Experience Solution Consultant, RSM

Paul works with clients to solve their business issues by using technology and process improvement.

Learning objectives

- Determine customer satisfaction with the services/products provided
- Identify strategies that can be implemented to increase customer retention and spend
- Explain why employee experience is also important to keeping talent and motivating a workforce
- Detail how to assess customer experience maturity



TABITHA DAUGHERTY

A HUMAN-CENTERED APPROACH TO EXPERIENCE DESIGN

What does human-centered mean?

Being **human-centered** means designing and building empathetic experiences upon a foundation of **deep understanding**.

People are complex



Their feelings, motivations, goals, and behaviors don't always fit into a single box. That's why stories and context – not just numbers– lead our approach to human understanding.

- Research, surveys, workshops
- Personas and behavioral segmentation
- Empathy maps
- Stakeholder maps

What is customer experience?



PRODUCTS / SERVICES



EMPLOYEES



PRINT & SOCIAL MEDIA

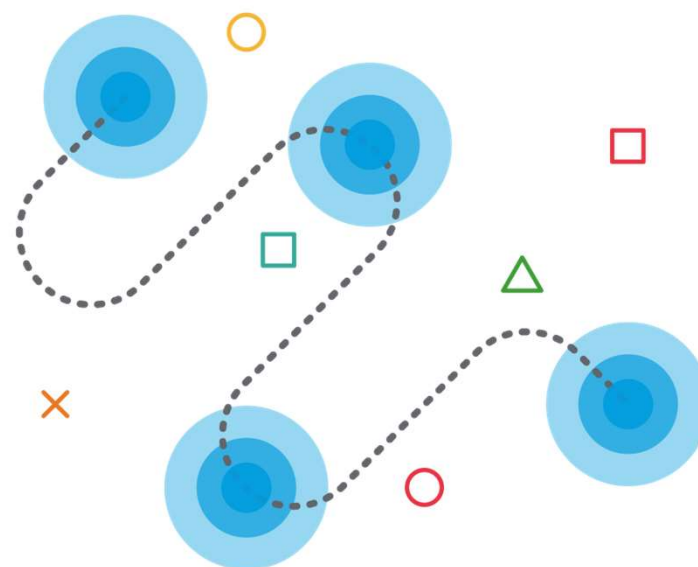
“The customer's perceptions and related feelings created by interactions with an organization.”

Gartner



The customer journey

- Phases of the journey
 - awareness
 - consideration
 - conversion
 - engagement / service
 - loyalty & advocacy
- Multiple Interactions
 - saying/doing/thinking/feeling (empathy maps)
- Opportunities and gaps



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RON GIBLIN

Why do organizations need OCEM?

A disconnect exists between the service customers expect and the service they're getting.

73% of customers say **customer experience is important** in their purchasing decision.

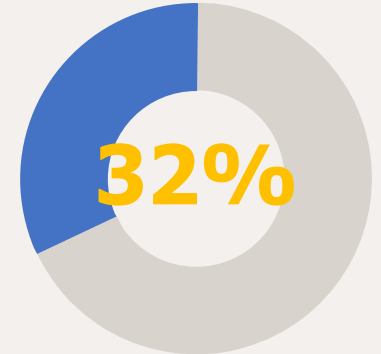
49% However, **only 49% say companies succeed** in delivering good customer experiences.

CX
Laggards

5X

CX Leaders

CX Leaders have **5X greater revenue growth** over CX Laggards.



of customers **will walk away from a brand they love** after just one bad experience.

Source: Forrester, PwC

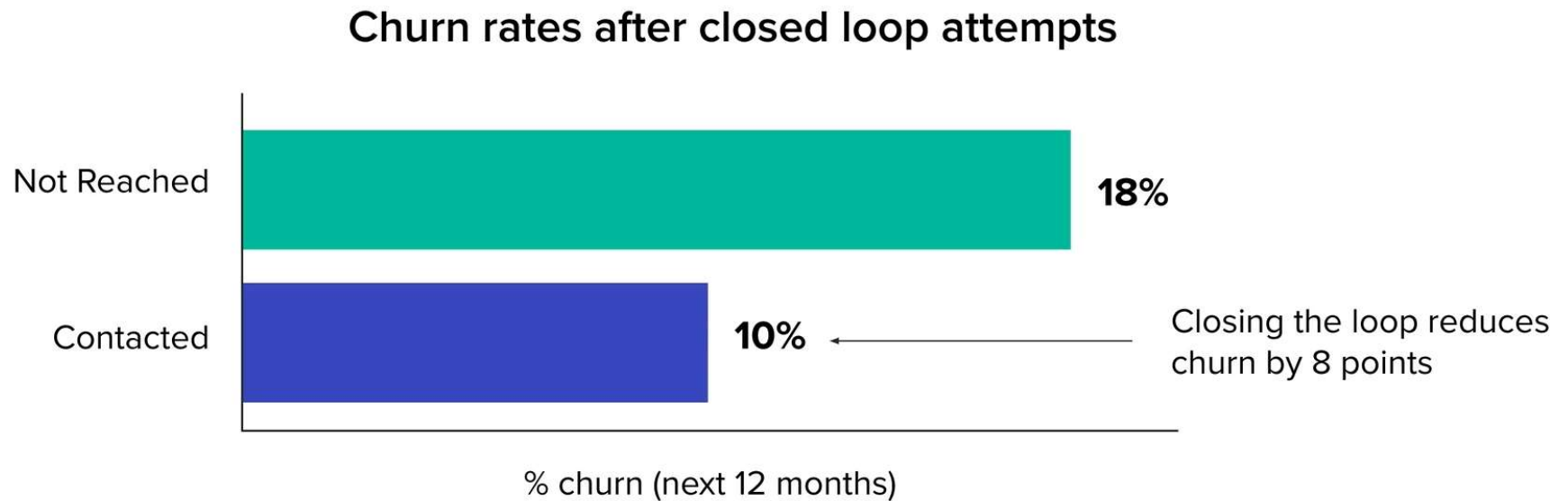
Net promoter score



The net promoter score is a single, easy-to-understand metric that provides feedback on customer satisfaction, and significantly, predicts overall company growth and customer lifetime value.

Improving CX is a good bet as building positive customer referrals is a way to avoid racing to the bottom on price.

Closing the loop to reduce churn



Not reached (n=1090) vs Contacted (n=866) difference is statistically significant at $p < 0.001$

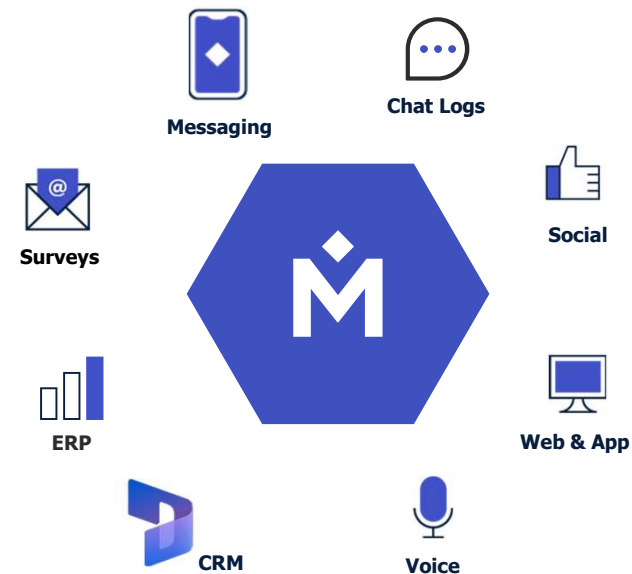
Where do experience signals come from?

Structured Data

Operational – Systems of record and engagement – demographics, customer ID, case topic, case disposition

Unstructured Data

Experiential – Contain Feedback and Emotional Content / Signals



Touchpoint owners & closed loop management

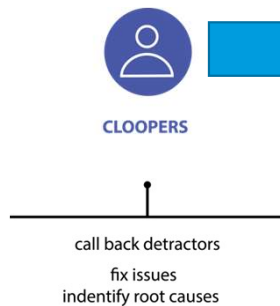


Table Compare Snapshot						
Saved Filters	Timeperiod	ReportingDate	Touchpoint name	Columns	Benchmark	Calculation
None	04/01/21 to 06/30/21	Respondedate	Claims	Time	Past Performance > Same Period YoY	Average
Table Calculation Average Timeperiod: 04/01/21 to 06/30/21						
Satisfaction				Share of customers rating (%)		
Extremely Satisfied	Extremely Dissatisfied	Total		9-10	7-8	0-6
Sample Size 1158						
Key Metrics						
Likelihood to recommend	<div><div></div><div></div><div></div></div>	8.6		72.8	15.6	11.7
Claims Driver Questions						
Ease of submitting the loss report	<div><div></div><div></div><div></div></div>	8.7		69.5	20.1	10.4
Satisfaction on homepage content	<div><div></div><div></div><div></div></div>	8.6		64.5	21.0	14.5
First Contact Claim	<div><div></div><div></div><div></div></div>	9.1		81.3	12.6	6.1
Friendliness Interlocutor	<div><div></div><div></div><div></div></div>	9.3		84.6	10.8	4.7
Assistance In Case of Damage	<div><div></div><div></div><div></div></div>	8.8		76.0	13.9	10.1
Status Information	<div><div></div><div></div><div></div></div>	8.4		68.0	16.8	15.2
Claim Handling Process	<div><div></div><div></div><div></div></div>	9.0		79.8	11.4	8.8
Speed of Processing - Claims	<div><div></div><div></div><div></div></div>	8.8		76.3	12.7	11.0

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CASEY LEVINE

OUR ORIGIN STORY

Turning Insights into Action

LEADING THE INDUSTRY

**The
2000s**

Engaging Every Employee

Personalized Role-based reporting at every level, Learning Workflows, Link between Customer and Employee Experiences

**The
2010s**

Action-Oriented Intelligence

Text Analytics and Unstructured Data Workflows
Journeys: Top-down, Bottom-up, Profiles

**The
2020s**

Moving Beyond the Vocal Minority

Striving for 100% of interactions: Social, Video, Speech, Digital Behavior, Ideas, RTIM, Journey Orchestration

ONLY MEDALLIA

64%

Of our programs have
100+ users

60%

Of programs touch
Employee Experience

1.6B

Unstructured signals
analyzed in 2021

86%

Of programs span more
than one department

80%

Of signals analyzed are
non-survey data

4.6B

Automated actions
this year

MEDALLIA

How Medallia Works

01 Capture & Organize

Broadest native collection in the market powering **complete, continuous & modern listening**



Speech



Digital Behavior



Video



Social & Reviews



Surveys

02 Predict, Prescribe & Prioritize

AI & ML based approach throughout reporting & workflows powering an **early warning system**



AI Models



Customer Profiles



Text Analytics



Journey Analysis



Embedded ROI

03 Act, Learn & Transform

Organizational hierarchy mapping & ability to scale driving **widespread accountability and action**



Role-Based Dashboards



Human & Automated Workflows



QA & Coaching



Action Plans



Ideas / Crowdsourcing

Right insights to the right place at the right time to act – at scale

Supporting Over 2,100 Leading Brands Globally

Medallia has very strong relationships with the leading strategy and management consultants, and proven commercial and technical partnerships with leading independent software vendors (ISVs) ~Gartner

100%
Implementation Success

98%
Customer Renewal Rate

65
Customer Relationship NPS

2,000+
Brands use Medallia

20+
Years Experience

Global Leader awarded by:



EXPERIENCE LEADERS



MID MARKET LEADERS



What We Do: Medallia for Mid Market



Unified Experience Management Platform *Purpose Built for Driving Signals to Action*

powered by Medallia Experience Cloud

Digital & Marketing Experience

Increasing digital engagement & creating more value during online and mobile interactions

Service & Support

Ensure customers can properly get their questions answered and issues resolved

Location-Based Operations

Driving real-time understanding for effectiveness & better experiences

Sales & Customer Success

Increasing in the moment feedback to identify opportunities and risks

Executive Engagement

Drive a customer-centric culture throughout the organization by engaging C-Suite and executives

Employee Experience

Understanding the employee journey to hire and retain the strongest talent

Seamless Integration & Automation

- Real-time pre-built connections with 100s of systems.
- Low administrative and IT burden with our flexible data exchange capabilities
- We are the preferred partner with the core software you already use.

Salesforce Fastest Growing ISV Partner (2020 & 2021)



ServiceNow App Development Partner of the Year (2021)

ORACLE

servicenow

Adobe Digital Experience Global ISV Partner of Year (2021)



Dynamics 365



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DEMONSTRATION

Developing a customer experience framework

A QUICK START GUIDE



Closing



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THANK YOU FOR
YOUR TIME AND
ATTENTION



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