



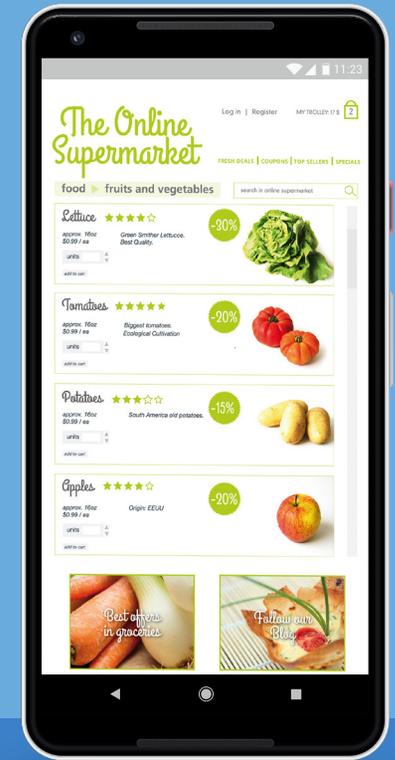
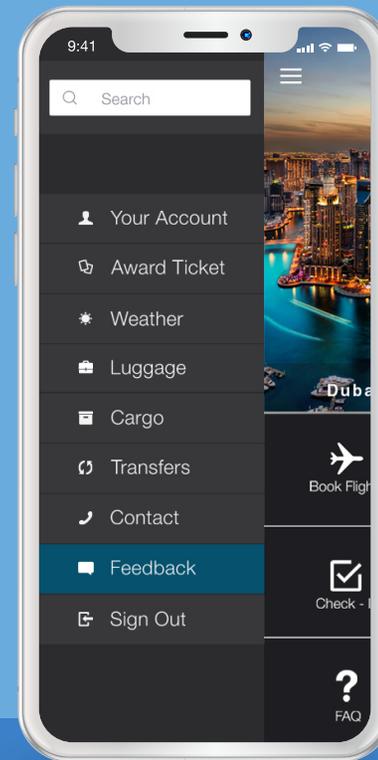
Medallia for Digital - Mobile SDK

In-App Voice of Customer Best Practices



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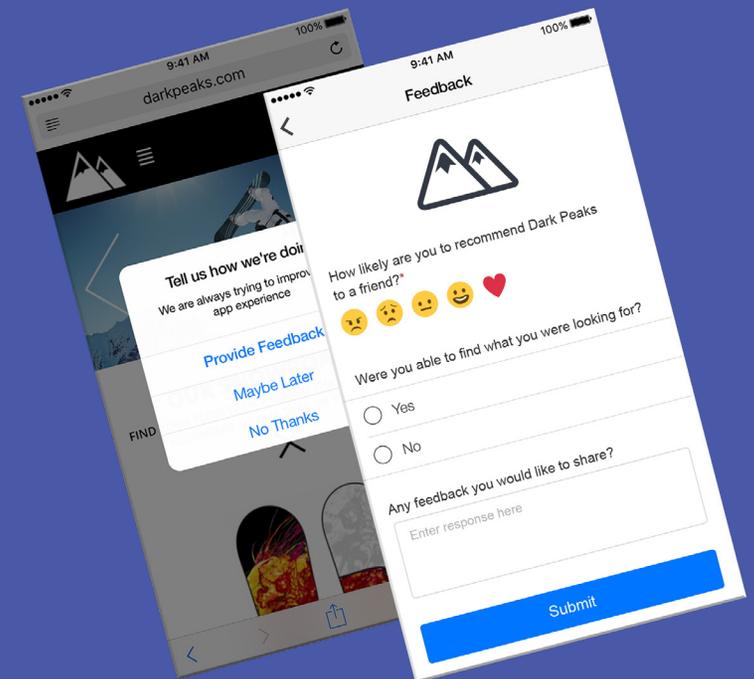
Medallia for Digital Mobile SDK

Medallia for Digital's Mobile SDK is the only solution which allows you to take full control of your mobile in-app users' customer experience.

The Mobile SDK enables you to engage with your app users effortlessly and in real-time; embed surveys directly in your app, adjust targeting or intercept settings and update survey content or design, all with the click of a mouse.

The SDK integrates quickly and easily, with limited resources needed. Once it's integrated, you won't need to rely on development or IT, or wait to deploy new app versions for changes and updates to take place, you are in control.

Along with the native-like UI components – expertly designed to follow Android and Apple guidelines – your users are sure to enjoy a seamless, on-brand in-app customer experience.



Key Features



Intuitive Drag and Drop Survey Builder

Full design controls allow you to easily create and update surveys with no technical help



Changes in Real Time

Survey changes and intercept rules are reflected in your app in real-time without the need for code changes or app upgrades



Optimized for Performance

The Mobile SDK is consistently and thoroughly tested for impact on performance. The results verify its' low CPU, memory and battery footprint, while still maintaining optimum performance levels.



Custom Surveys

Design surveys to blend in with the look and feel of your brand, for seamless integration into your app. Get even more flexibility by creating custom HTML surveys; have your developers write, test and verify your signature components, with no restrictions at all.



Supports both IOS and Android

Fast, straightforward and simple integration on both iOS and Android



Detailed Dashboards and Reports

Get detailed, real-time insights and a rich set of purpose build reports for in-depth analysis into user-satisfaction, sentiment and intent



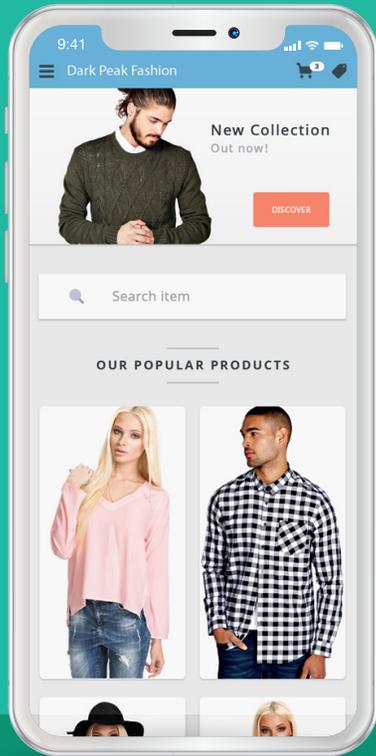
Multiple Feedback Modularities

Dynamically deploy intercept, "always on" and code triggered surveys in minutes



Powerful and Flexible Targeting

Know exactly who your users are and when and how to reach them. Target users based on in-app behavior, custom parameters and session parameters. Segment by metadata such as device, OS and app version. You can even program the SDK to be muted so that your users are not interrupted during a critical flow.



Mobile App Usage Paradigm

Mobile app usage patterns differ significantly from web ones: with the exception of a few categories of mobile apps, users are very goal-oriented when using mobile apps. For example, when you log in to your bank's app, you could check your balance, make a transfer and close the app. Users don't just browse in most apps.

In order to optimize the customer experience in a goal-oriented environment, you need to focus on app journeys - the flows through the app that allow users to complete their goals.

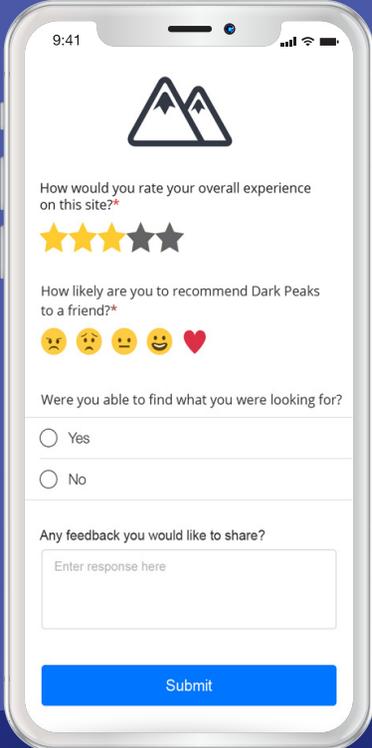
Systematically measuring and optimizing app journey experiences will lead to better app engagement, elevate customer satisfaction and help you achieve your bottom line results.

Passive vs. Proactive VoC Approaches

A successful Voice of Customer (VoC) program utilizes both proactive and passive feedback approaches.

In order to effectively measure in-app customer experience and optimize mobile app journeys, we recommend inviting (intercepting) users to provide feedback at carefully selected points in their customer journey. This proactive approach is the cornerstone of a VoC program, generates targeted feedback and enables actionable insights.

It is also important to provide users with a simple and visible option to provide feedback when they choose to (passive approach). An Always-on option provides users with an outlet to vent their frustrations and let you know what's bothering them, as well as deflect negative feedback from social channels.



The image shows a smartphone screen with a feedback form. At the top, there is a logo consisting of two mountain peaks with an upward-pointing arrow. The form contains the following questions and options:

- Time: 9:41
- Question: "How would you rate your overall experience on this site?*" with a 5-star rating system (4 stars selected).
- Question: "How likely are you to recommend Dark Peaks to a friend?*" with five emoji options (sad, neutral, happy, very happy, heart) and the third option (happy) selected.
- Question: "Were you able to find what you were looking for?" with radio buttons for "Yes" and "No".
- Question: "Any feedback you would like to share?" with a text input field containing the placeholder "Enter response here".
- A blue "Submit" button at the bottom.

Proactive Approach: Intercept Surveys

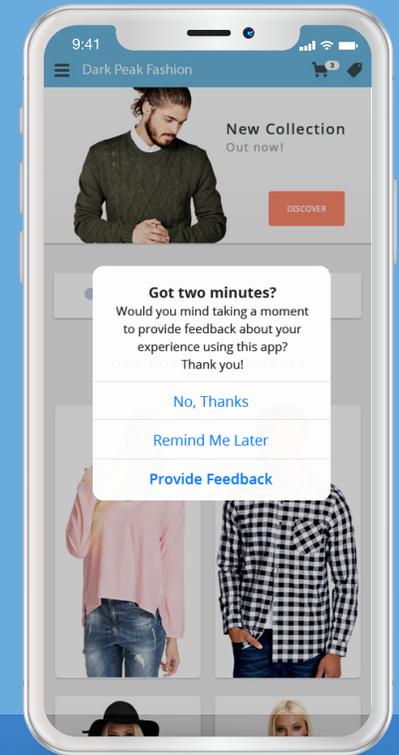
The most effective way to collect actionable, specific feedback is to target the **right users with the right content at the right time**. Targeted, in-the-moment surveys enable companies to ask specific users relevant questions in order to optimize specific app journeys.

Because intercept surveys are presented in the moment after a specific action/behavior and are contextual, they feel part of the experience and are more likely to generate actionable insights.

Systematically applying this methodology across journeys results in apps that are streamlined, simple to use and loved by their users.

Here are some examples of targeted in the moment surveys:

- Purchase experience survey in an e-commerce app
- Check-in experience survey in an airline app
- Satisfaction survey post balance check in a banking app



Example of an airline app persona



Michelle
Age 29
Lives in LA
Account Manager

Behaviors and Beliefs

- ◆ Tech savvy
- ◆ Uses mobile apps extensively
- ◆ Active on Instagram, Snapchat,
- ◆ Twitter
- ◆ Values efficiency and speed
- ◆ Travels frequently for work

Goals and Needs

- ✓ Ability to make flight itinerary
- ✓ changes on the go
- ✓ Quick and simple Changes on the go

Identifying Personas

The first step in creating a successful proactive VoC strategy is to identify the key personas who use your app. When putting together your persona definitions take into account demographic data, usage patterns, CRM data, etc.

Once you define your personas, make sure you are able to identify the persona while in the app so that you can target your users in real-time effectively. For example, if a persona is a “VIP User” and is tagged in your CRM system, make sure that information is available in the app so you can use it for targeting.

Mapping App Journeys

Most apps are a collection of functions that users use to complete specific tasks or to achieve specific goals. For example, an airline app might offer the following functions: book flights, check-in, check flight status, etc.

Each of these functions is an app journey - a flow within the app that leads the user from start to finish - to completing their task. In order to optimize app experience, increase engagement and achieve your KPIs, you should systematically optimize app journeys, reducing friction and simplifying them.

Start by choosing the most critical journeys and map the steps users need to take to complete them. Decide on the right place and time to ask users about their experience and tailor the right questions for the specific persona and journey to get optimal insights.



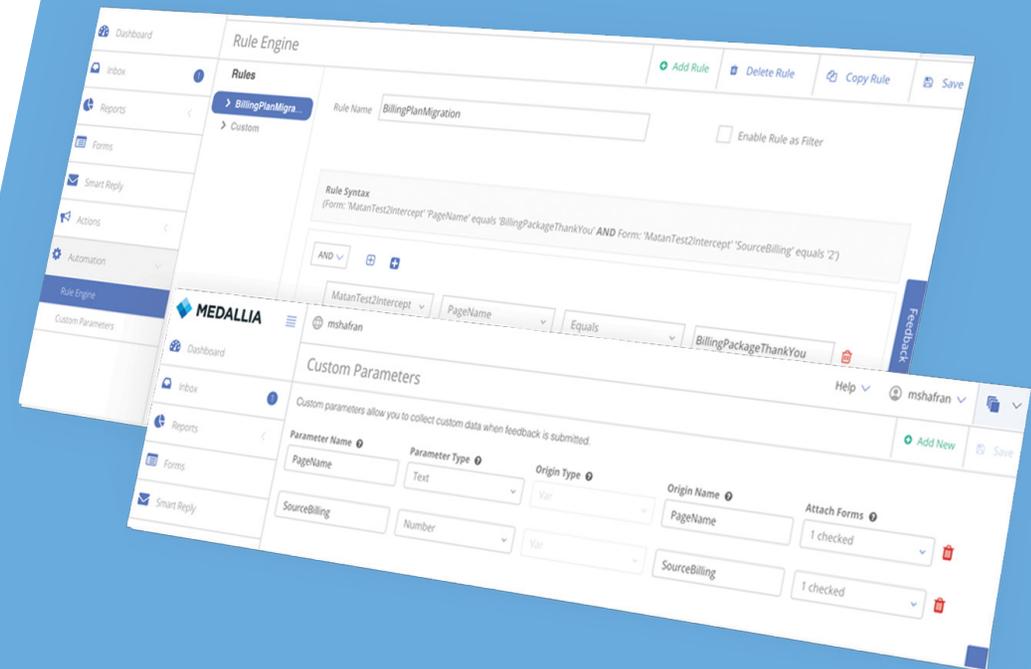
Using Data for Effective Engagement

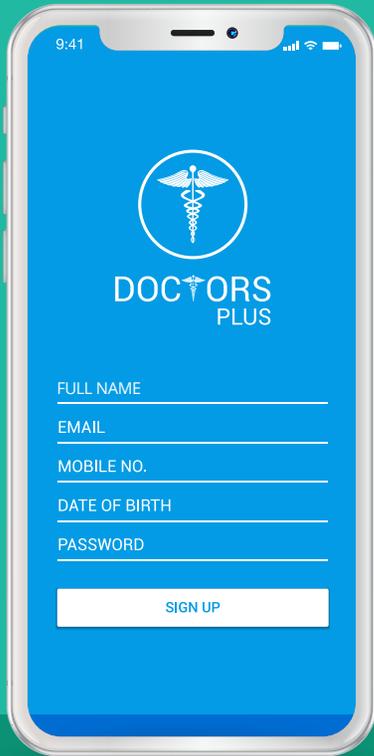
In order to enable both in-the-moment specific engagements as well as effective analysis of the feedback, it is important your app provides the right data to the Mobile SDK as the user interacts with the app.

There are three categories of data the app can provide:

1. User data
2. Journey data
3. Interaction data

The Medallia Digital Mobile SDK enables apps to pass data using Custom Parameters. These parameters are defined by the CX team and are then populated in real time by the app with relevant data.





User Data

User data refers to information that can help you identify the user who provided feedback so you can close the loop with the user if needed. Depending on your data privacy policy this can be email address, user ID, phone number, hashed token, etc.

User data also includes information such as CRM segment data, app analytics data and more that helps you segment and target intercepts at your users while in the app. For example, if a user is defined in your CRM system as a “Gold user”, that information should be available to the Mobile SDK to enable you to create targeting rules aimed at “Gold user” personas.

Journey and Interaction Data

Journey data refers to data that marks the app journey the user is on. Such data is crucial for enabling targeted journey-based intercepts such as post-transaction surveys, as well as for later analysis by allowing you to filter feedback or report by journey. When a user enters an app journey, the app should send the information to the Mobile SDK.

Interaction data refers to data about specific actions users take while interacting with the app. By providing interaction data to the SDK, you can later understand feedback in the context of user actions, as well as target users who take specific actions. For example, an image editing app should let the Mobile SDK know if a user deletes a picture to allow you the CX manager to target users who perform a delete action if needed.



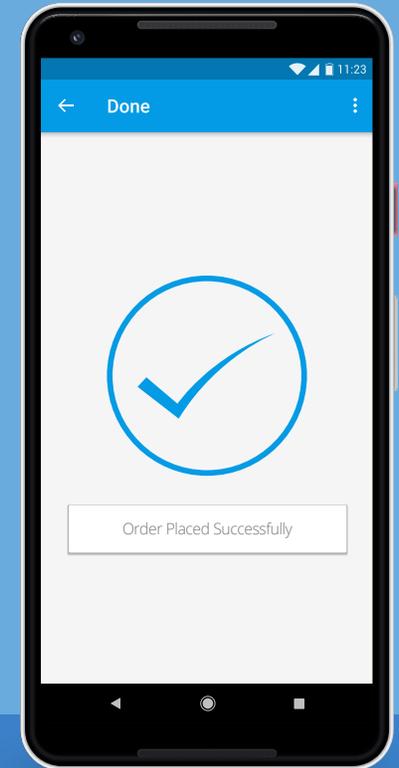
Implementing Intercept Surveys

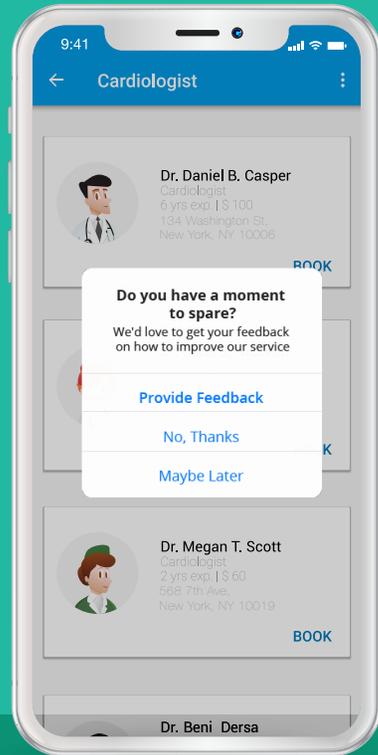
General considerations

When implementing any type of intercept surveys, the app should ideally provide the Mobile SDK the following data (where relevant):

1. User ID
2. Persona / segment
3. Current app journey

Providing the above information for each surveys will enable contextual targeting (using persona and segment data), while the User ID will enable closing the loop with users if needed. The data will also help with better analysis, allowing for filtering and reporting by persona and journey.





Implementing Intercept Surveys

App journey surveys

When implementing app journey surveys, start by selecting the relevant journey and, if applicable, the relevant persona.

The app should notify the Mobile SDK when user starts the app journey, and when journey ends (this will usually mark the intercept point).

Depending on the specific journey, the survey should include some or all of the following questions:

1. Journey satisfaction question ("How satisfied are you with the check-in experience?")
2. Customer effort score question ("How easy was it to wire money using the app?")
3. Verbatim question ("Any other feedback about the purchase experience?")

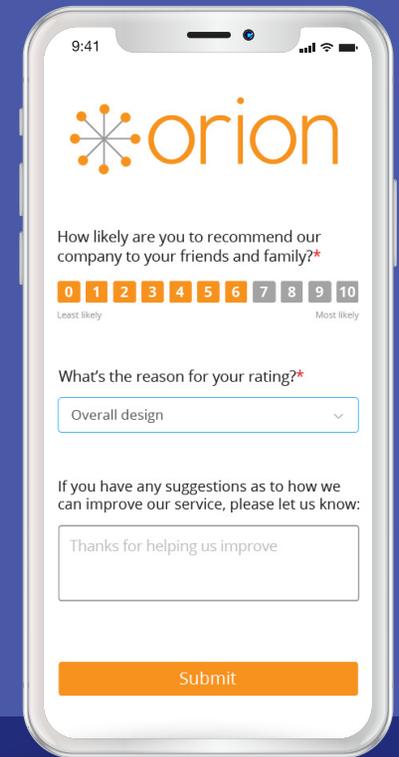
Implementing Intercept Surveys

General intercept surveys

General intercept surveys allow you to check the overall satisfaction of users and get the pulse of their sentiment, uncovering unknown unknowns. When implementing these surveys in-app, be sure not to interrupt key app journeys that can result in user distraction and lower journey completion rates. See [Ensuring Uninterrupted App Journeys](#) for more information.

General intercept surveys should include the following questions:

1. NPS or general app satisfaction question (“How satisfied are you with the app experience”)
2. Question about key goal for using app this session (“What is your main reason for using the app today?”)
3. Verbatim question (“Any other feedback about your experience today?”)

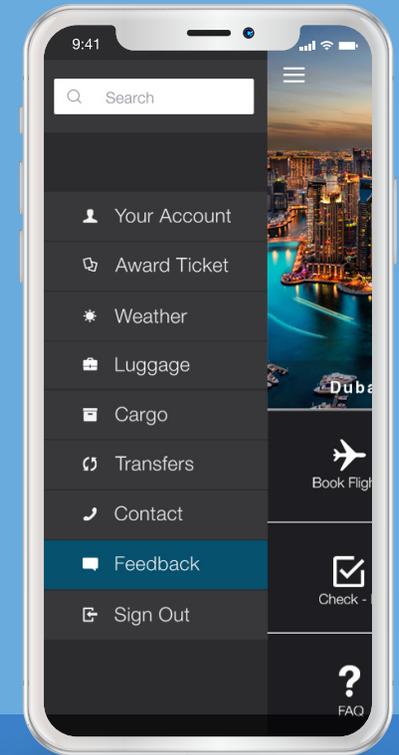


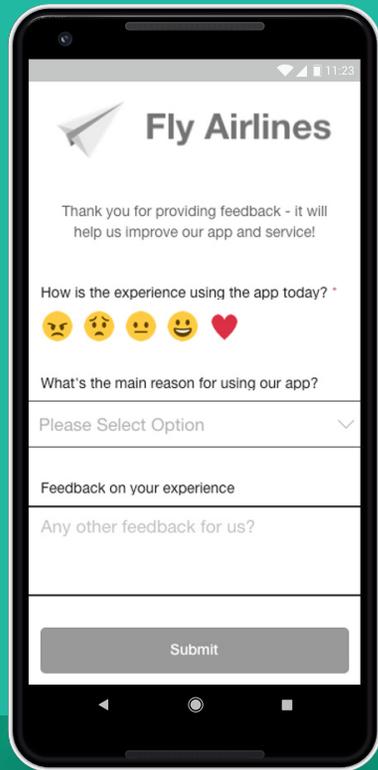
Passive Approach: Always-on Feedback

The most straightforward way to implement Always-on feedback is to add a feedback option to the main app menu.

When users click the Always-on option (e.g. "Feedback" menu item), the app brings up the designated Always-on survey by asking the Mobile SDK to display the survey.

In order for always-on feedback to be most effective, we recommend passing appropriate metadata (such as user identifier) to the Mobile SDK so that when the feedback is collected it is most actionable.





Implementing Always-on Surveys

The Always-on option should trigger a simple and short survey that allows users to let you know what's on their mind without requiring too much effort.

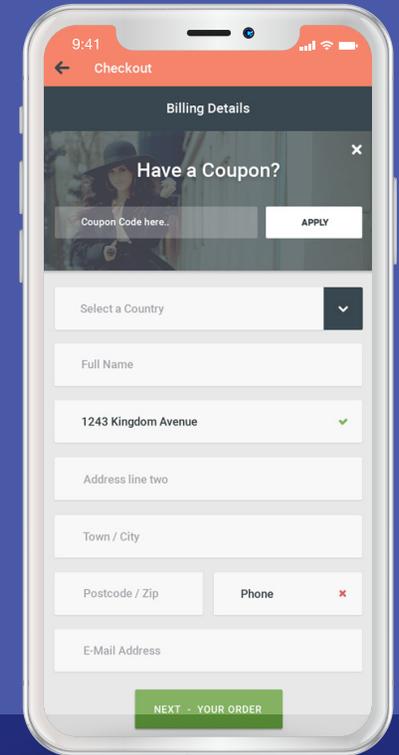
Good Always-on surveys usually include the following components:

1. Satisfaction question (CSAT / NPS)
2. Category question (list of possible reasons for the users to use the app)
3. Open text question for users to provide their feedback

Ensuring Uninterrupted App Journeys

There are times when you definitely do not want to intercept users as they traverse app journeys. For example, when a user is going through a purchase journey, or when users are watching a video, intercepting them to ask for feedback can result in a negative experience or worse.

To ensure the integrity of an app journey you should target at specifically selected points in the journey (see **Proactive Approach**). Another method that can be used separately or in conjunction is the Mobile SDK's Do Not Intercept flag. When the flag is set, the SDK will prevent any intercepts from displaying.





About Medallia

Medallia for Digital helps companies keep pace with customers' constantly changing behavior by capturing customer feedback through targeted, contextual and compelling surveys across all digital channels, including web, mobile and in-app.

Medallia for Digital is the full power of Medallia Experience Cloud to deliver the most powerful digital CX solution in the market. Hundreds of the world's best-loved brands trust Medallia's Software-as-a-Service application to help them capture customer feedback everywhere the customer is (on the phone, in store, online, mobile), understand it in real-time, and deliver insights and action everywhere—from the C-suite to the frontline—to improve their performance.

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