

Medallia



GUIDE

Evaluating the Effectiveness of Your CX Platform

What's Working, What's Not, and What's Absolutely Critical

In today's ever-changing world, brands must be nimble and agile. This especially holds true when it comes to the customer experience (CX). Customer wants and needs are constantly evolving, as are their expectations of the brands they do business with. With the bar constantly being raised, savvy brands must have a robust and dynamic experience platform that operates, informs, and engages in real time and at scale.

Perhaps your brand has already made a wise investment in an enterprise experience program. As with any smart business strategy, it's crucial to periodically review whether your program is keeping up with organizational needs — have pieces of it become outdated? Is it producing the right insights, data, and predictive indicators for you and your employees? Evaluating your existing experience management platform against other solution partners can power your long-term strategy and fuel your bottom line.

The ideal platform has the ability to become part of your brand's DNA. It can capture insights and signals from every brand interaction and empower employees to drive customer engagement and loyalty. Within this guide, we'll explore the six foundational attributes needed to transform your experience program from good to exceptional.



100%



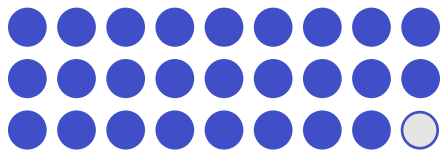
Fast, friendly service,
great experience

Customer rewards |



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Companies that lead with and prioritize the customer experience are 26 times more likely to see revenue growth of 20% or more than those that neglect this area.

26x 



Role-Based Architecture

Empowering Employees with Role-Specific Data

The ideal CX platform is strategically and seamlessly embedded into your business's daily workflows and provides employees with role-specific customer information. This gives them the timely information and insightful data they need to effectively engage with customers and positively influence their experiences.



Customer-Driven Program

Be Customer Led; Not Survey Driven

We're talking more than survey feedback. Brands need the ability to collect, analyze, and act upon omnichannel data from all customers — even the ones who don't vocalize their feedback. This powerful data is key to elevating overall customer experiences at scale, driving repeat engagement, and fueling loyalty.



Enterprise-Grade Infrastructure

An Agile & Scalable CX Platform Is Paramount

If your current platform lags and can't keep up with the demands of your business, it can be detrimental to the organization. A lack of platform scalability often has a negative impact on user adoption and engagement, which keeps the brand's CX and EX from growing to its full potential.



Innovative AI and Embedded Workflows

Go Next Level with the Right Technology

The right platform partner can make deploying state-of-the-art technology such as generative AI effortless for your brand. This in turn will take your CX and EX programs to the next level, allowing your organization to prosper in a competitive and ever-changing marketplace.



Unified Experience Insights

Unified Insights & Data Prevail

The most effective CX platforms enable brands to easily understand all customer experiences across all brand channels and touchpoints, with the ability to prioritize, and act upon, the most impactful insights and data.



Connected EX

Create Customer Centricity from the Inside Out

Business success is dependent on a strong employee foundation. To achieve this, organizations must create an environment where they can be more effective, motivated, and inspired in their roles — and provide the right tools for them to carry out their best work.

Deep Dive: The Six Foundational Attributes for Effective Experience Programs

Role-Based Architecture

Simply put, role-based architecture ensures your CX platform is feeding data to the right people, in the right way, every time. Relevant data is shared with your employees in an actionable way, based on their role. This ensures they have easy and immediate access to the information they need to positively impact customer experiences in the moment.

Equally important is your brand's ability to keep up with organizational talent fluidity, in terms of employees who move into new roles, change teams, or exit. Is your current CX platform capable of reflecting this movement on a daily basis? If not, employee confidence — and their daily utilization of powerful customer data — will wane.

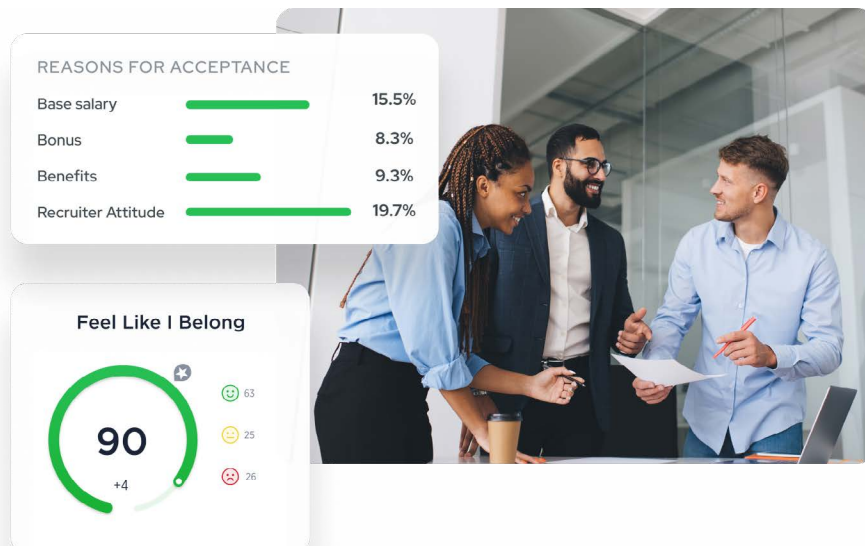
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CX leaders are 3.5 times as likely to say that their employees use CX data to support their day-to-day decision-making.

3.5x ● ● ● ●

Ask Yourself:

- Do your employees have easy access to the role-based customer data they need to make a difference in real time?
- What percentage of your employees use your current CX platform?
- How efficient and effective is your current process to ensure role-based architecture is deployed — is it manual or validation-required?



Enterprise-Grade Infrastructure

Imagine a high-end sports car with a V4 engine — it's capable of so much, but doesn't have the power it needs to perform. And how many fixes or add-ons are necessary for it to run optimally? The same holds true with CX platforms. Utilizing one with an enterprise-grade infrastructure is paramount. It is critical to be able to process millions of customer records without performance degradation and/or scalability issues.

Ask Yourself:

- How many enterprise-scale, complex implementations has your current platform done, and how long have they been customers?
- Can your current CX program seamlessly process millions of records without performance degradation?

Flex Your Medallia Muscle

Medallia was built for enterprise scale and complexity. For example: Medallia has **200,000+** users of text analytics (TA) across **1,000+** accounts with **3.73 million** TA reports accessed and **7.5 million+** alerts generated each month. Medallia's engine supports hundreds of millions of records and complex queries without performance degradation. Load time? Less than a second.

Unified Experience Insight

Having a comprehensive understanding of your customers' experiences across all channels and touchpoints is vitally important. The ability to capture and analyze these omnichannel signals, detect and prioritize the most important learnings, and then import and export this data is a key differentiator. All of this is contingent upon the integrity of historical data, which gives your brand the strategic advantage of measuring changes in customer satisfaction over time. Disconnected data, on the other hand, can deliver an inaccurate, skewed view of CX.

Ask Yourself:

- How many signals can you currently bring into your current CX platform natively? And how easy is it to import and export signal data?
- Do you have an "all-in-one" platform that can capture your most valuable signals and grow your signal capture ability?
- Is your platform capable of handling the scale of your data while generating a quick and accurate analysis of it?



How was your experience?



Customer-Driven Program

Your customers are critical to your brand's success. They can propel your business forward or negatively impact your bottom line. That's why savvy brands understand the importance of capturing customer experience data from each and every interaction. It's much more than "feedback and surveys" — instead, a customer-driven program centers on a comprehensive, cross-channel understanding of what matters most to every customer. This deep customer understanding needs to encompass your entire brand ecosystem, including contact centers, digital channels, chat messaging, and video feedback.

In addition, smart brands understand the importance of listening to, capturing, and acting upon feedback and ideas from their employees. These invaluable insights can address CX friction points and detractors, as well as identify new ways to elevate CX.



The Power to Personalize

Medallia is a comprehensive experience solution that captures, analyzes, and integrates experience insights across all touchpoints and channels. This rich dataset goes beyond traditional, reactive survey data to elevate omnichannel experiences in the moment. In addition, the ability to personalize and orchestrate experiences is more important than ever, as customers increasingly expect and respond to this type of proactive and individualized engagement.

Ask Yourself:

- Does your current CX platform enable you to have a complete, accurate, and non-siloed understanding of every customer's interaction with your brand?
- Is it built for all of your customers, or is it skewed toward those who routinely respond to surveys or frequently share on social and review sites?
- With your current platform, can you leverage customer data to personalize your customers' experiences (regardless of channel)?

Enterprise investments in CX improvements resulted in:



25%

average profitability increase



24%

average improved retention/loyalty



24%

average expansion in customer spend

<https://www.medallia.com/wp-content/uploads/pdf/IDC%23EUR150599523+-+Medallia+infographic+Final.pdf>

Innovative AI and Embedded Workflows

Just as your CX platform should be a part of your brand's DNA, so is the case with AI within that platform. Successful CX programs are customer-centric and supercharged with the right mix of advanced automation and seamless human touch capabilities to enable quick, informed action at scale, achieve operational efficiencies, and drive measurable impact.

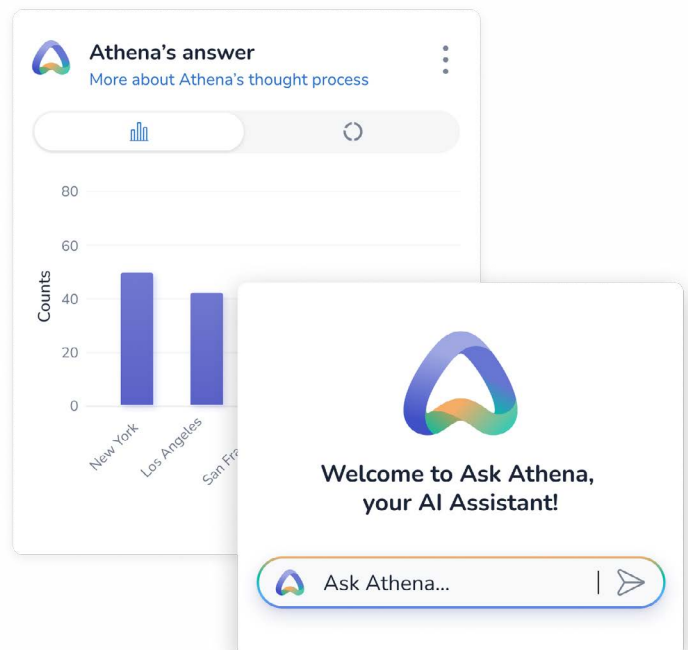
When intentionally integrated, next-generation AI will augment human workflows to prioritize work and achieve goals faster. For your brand's full benefit, AI insights must be accessible, ethical, and relevant to all employees. New developments such as generative AI can expertly help employees prioritize impactful work vs. repetitive tasks to respond more quickly or act in an agile manner, all while using data to detect and reveal new or emerging CX and EX trends that impact your business.

Ask Yourself:

- Can your current CX platform embed ethical AI into every workflow?
- How many of your current workflows utilize AI to positively impact employee effectiveness and operational efficiency?
- How easy is it for your employees (from the frontline to the C-suite) to access, understand, and use AI insights in their daily work?
- Does your current platform use sophisticated algorithms to surface new CX trends within your data using root cause analysis?

Supercharge Your Call Center

Imagine being able to unleash a trifecta of AI, machine learning, and automation. Take a call center for example. Medallia's highly accurate (90%+) native speech-to-text technology can transcribe every word of every call and automatically score 100% of all agent-customer interactions. This powerful data in the shape of real-time insights, transparency, and personalized coaching can be shared with your frontline teams to bolster their effectiveness.



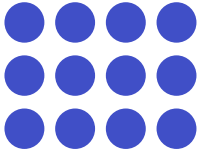
Connected EX

If customer and employee experiences are a priority for your organization, then the same should be said for connecting their platforms. Empowering employees with relevant and timely customer insight, smarter automation of routine tasks, and the ability to share feedback and ideas will make them more effective, motivated, and inspired in their roles — a true win-win. When CX and EX are connected in one platform, it creates a seamless link between insights and action while enabling you to measure outcomes like customer loyalty and revenue, as a result of applying an employee solution to a customer issue.



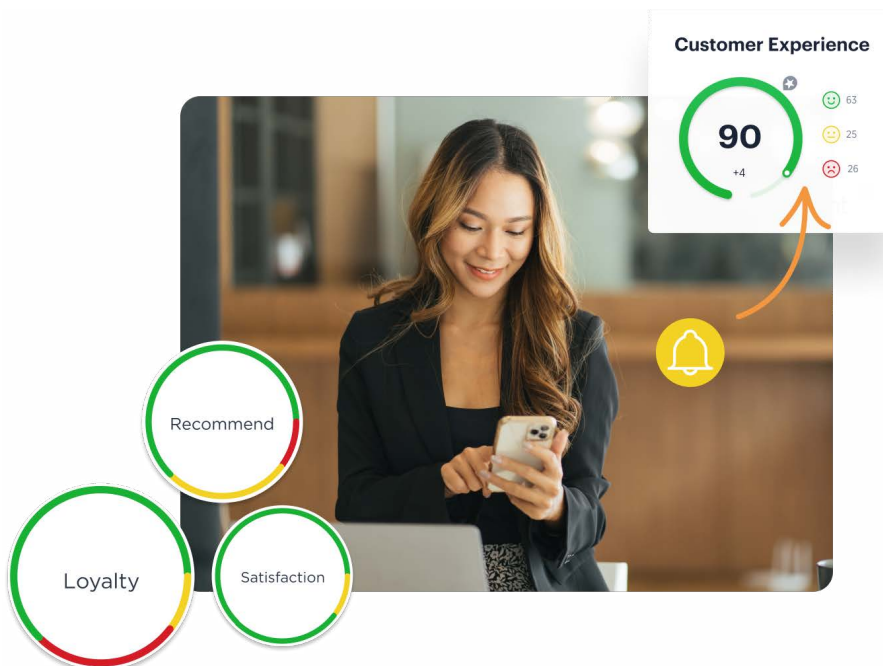
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Employee experience leaders are 12x more likely than laggards to indicate that their revenues grew by more than 20% over the last year.

12x 

Ask Yourself:

- How do you attribute return on investment (ROI) to the impact of EX and CX?
- Are you able to measure employee success as it relates to loyalty, retention, and revenue?
- Do you enable and empower your employees to share feedback and ideas for improving the customer experience?



Conclusion

Successful brands understand the importance of having a comprehensive experience platform that evolves with their business, responds to changing customer needs and preferences, and deploys a strategic mix of scalable, transformative technology. With the right platform, brands can continuously track, automate, improve, and personalize every customer experience — across all channels and touchpoints. It also drives businesses forward, allowing them to successfully anticipate customer needs and continuously improve.

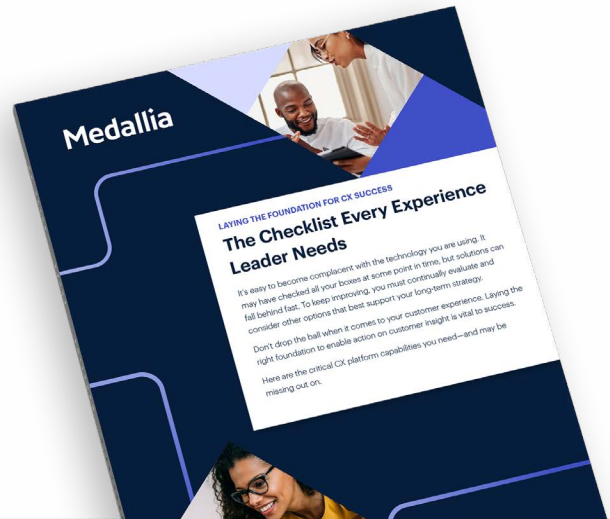
In fact, on average, Medallia clients achieve:



<https://www.medallia.com/wp-content/uploads/pdf/IDC%23EUR150599523+-+Medallia+infographic+Final.pdf>

Assess the effectiveness of your current CX platform today and learn more about the Medallia difference.

[Read more](#)



About Medallia

Medallia is the pioneer and market leader in customer, employee, citizen, and patient experience. For more than 20 years, we've extended far beyond just feedback and surveys to capture billions of experience signals — across all customer and employee interactions — and enable brands with the tools to act on what's most important and impactful. Our difference comes from our long-standing track record of successfully uniting the “people” component of CX with leading-edge technology like AI and experience orchestration that enables organizations to thrive from the inside out. www.medallia.com.

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