

Mastering CX Prioritization:

# Expert Strategies for Smarter, Faster Decisions

Leverage real-time data, eliminate roadblocks, and drive business growth with an omnichannel CX strategy.



# Introduction

**Understanding your customer experience—and knowing what needs to change—is key to delivering on your brand promise and driving loyalty. But as customer expectations rise and interactions span more channels than ever, it's becoming harder to get a clear, actionable picture.**

Without a strategy that connects insights to action, CX efforts risk becoming reactive, siloed, and slow to drive real impact.

**So, how do you prioritize what really matters?**

CX leaders need a strategy that unifies teams, fuels action, and delivers measurable outcomes. That starts with breaking down silos, equipping employees with the right tools and training, and ensuring insights drive decisions—not just reports. It also means evolving your tech stack to capture and analyze customer signals as they happen—across every channel, from direct interactions to digital behaviors.

Winning brands use AI-powered intelligence to turn fragmented data into clear priorities. Instead of chasing the loudest complaints or relying on delayed feedback, they surface what truly impacts satisfaction, loyalty, and revenue—enabling faster, smarter decisions.

**In this guide, our experts share strategies to help you:**

- Build a unified CX strategy with governance that drives action.
- Break down silos and foster collaboration.
- Empower teams with the right tools and training.
- Prioritize speed in high-impact areas.
- Capture and analyze real-time signals across the entire journey.

It's time to move past outdated methods and embrace a strategy that makes money, saves money, and reduces risk. With the right approach, CX becomes more than a program—it becomes a powerful growth engine.



# Meet the Experts



**Melissa Arronte**

PhD, VP, Executive Advisor for EX

Melissa is the designer of Medallia's employee experience and strategy vision. She brings over 20 years of experience in employee survey research and HR at brands like Liberty Mutual Insurance and Citizens Bank.



**Judy Bloch**

VP, Executive Advisor for Financial Services

Judy is an innovative CX leader with a track record of driving change and designing seamless omnichannel experiences. She has led CX initiatives at Sprint, Citi, and UMB delivering industry-recognized, measurable impact.



**Mike Debnar**

VP, Executive Advisor for Retail

Mike's deep expertise comes from leading customer experience and digital innovation at companies like 7-Eleven. He has over 10 years of experience helping Medallia customers redefine their CX strategies and drive more revenue.



**Michael Mallett**

VP, Product of CX Solutions

Michael is a customer and digital experience leader responsible for designing transformational programs with connected products and platform technology. He has spent over 15 years in CX, and founded Medallia's digital practice and solutions.



**Amber Maraccini**

VP, Executive Advisor for Healthcare

A certified Patient Experience Professional with over 15 years in healthcare, Amber has led experience management programs for academic and integrated healthcare systems like Renown Health, emphasizing trust, patient safety, and the overall care experience.



**Geoffrey Ryskamp**

VP, Executive Advisor for Hospitality

Geoffrey leads Medallia's Hospitality and Travel vertical, partnering with clients to build transformative experience programs. He has over 20 years of experience in hospitality and has held leadership roles with Hilton Worldwide, Marriott International, Pebblebrook Hotel Trust, and PwC.

## Top Challenges

**Here's what is getting  
in the way of brands achieving  
timely, prescriptive,  
and prioritized insights.**



## CHALLENGE #1

# A Lack of Unified Strategy + Governance

**How can you prioritize what matters if teams aren't aligned?**

As Judy Bloch puts it, *"Without a clear business problem to solve, your insights will be all over the place."*

When teams focus on different goals—like upselling versus customer acquisition—things get confusing fast. Without a unified strategy and clear governance, it's tough to make sense of your data or take action. Amber Maraccini adds, *"If teams don't see how they contribute to the bigger picture, silos take over."* These silos stall collaboration and delay decisions when you need them most.

## CHALLENGE #2

# Data Knowledge + Implementation Gaps

**Many brands struggle to fully leverage their data.**

Organizations often don't know what insights they have or lack. Even with powerful tools, many fail to engage with the data at their disposal.

### CHALLENGE #3

## Data Paralysis + Dated Insights

**Geoffrey Ryskamp highlights a key challenge: it's not just about having too little data, it's about not having the right tools to turn what you have into actionable insights.**

*"It's easy to feel like you don't have enough data to take action, or get buried in too much data that doesn't help you make decisions. The key is understanding business priorities and aligning what data you do have to them."*

And relying on rear-view insights from post-transaction surveys? That's a thing of the past. Waiting for data after the fact means missing out on valuable opportunities in the moment.

### CHALLENGE #4

## Failing to Bridge the Gap Between Insights + Action

**Even when organizations uncover valuable insights, they often hit a wall when it comes to taking action.**

Michael Debnar asks the real question: *"What happens after you discover a game-changing insight? Is there a clear path to turn it into action?"*

Without a solid plan to execute, even the most powerful insights can slip through the cracks, leading to missed opportunities and wasted efforts.

## Top Solutions

**To tackle these challenges and unlock timely, actionable insights, organizations should focus on a few key practices:**

- Align teams to prioritize what matters most for the business.
- Evolve beyond traditional CX data methods and embrace a true omnichannel approach.
- Invest in a next-generation CX tech stack to drive smarter decisions.



## SOLUTION #1

# Build a Unified Strategy + Governance Framework

Clear goals and a governance structure that connects the dots between departments are key to making sure your insights aren't just collected—they're prioritized and acted upon with purpose.

As Debnar puts it, *“Without a clear path for action and coordination, insights can easily get lost in the shuffle.”*

## SOLUTION #2

# Break Down Silos And Facilitate Cross-Department Collaboration

The best insights only work if they're turned into action. By fostering collaboration across departments, organizations can transform insights into plans that drive real results.

As Maraccini says, *“Top-down direction combined with bottom-up collaboration is the winning formula for action.”*

### SOLUTION #3

## Empower CX Champions At Every Level

Success requires a company-wide effort. CX champions across your business can spark the right conversations.

Bloch explains, *"It's about constant dialogue what can we control, and what needs action?"* These champions ensure CX stays top-of-mind at every level.

### SOLUTION #4

## Drive Impact With The Right Training

Even the most powerful tools won't deliver results if teams don't know how to use them effectively. Investing in training ensures your people can translate data into insights and insights into action.

#### SOLUTION #5

## Move Fast Where It Matters Most

*"In high-growth areas, speed is everything,"* says Mallett. Agile prioritization ensures you don't just keep up you stay ahead. Whether launching new products or responding to market shifts, quick access to insights, clear recommendations, and the ability to act through automation and empowered employees lets you seize critical engagement moments and maximize business impact.

#### SOLUTION #6

## Capture Real-Time Signals That Drive Action

*"Capturing experience data as it happens helps businesses spot friction points and resolve issues before they escalate or before customers disappear for good, taking their loyalty with them,"* says Ryskamp.

Instead of relying on direct feedback alone, top brands tap into signals across the entire journey combining support interactions, social sentiment, and behavioral data to uncover hidden pain points. *"You can't just chase survey scores and hope for the best,"* says Mallett. *"Most customers won't tell you how they feel outright, but their actions or inaction speak volumes. Bringing these insights together is the key to delivering seamless, personalized experiences."*



# Signals that Drive Action



Notes



Speech



Behavior



Point of Sale



Social and Third-Party Reviews



Operational Data



Customer Attributes



Customer Feedback



Video



Forums



IVR



CRM



SMS / Chat / Text



Benchmarking Data



Employee Feedback



Support Tickets

## Spotlight: Employee Feedback



Your employees are on the front lines of CX they notice things customers might not say outright. Reflecting on an example from banking, Bloch shares: *“Customers felt their conversations were no longer private because the branch was silent after we removed music as a cost-cutting measure. Employee feedback revealed both customer and employee impact.”* By tapping into both CX and employee data, organizations can spot and fix issues that might otherwise go unnoticed.

## Spotlight: CX Data + Operational Feedback



*“By linking experience signals with key operational metrics, CX teams can uncover high-priority issues across different departments,”* says Maraccini. Take healthcare, for example. When patient feedback is analyzed alongside appointment no-show rates or escalated support calls, it pinpoints issues that overlap with critical operational pain points.

## SOLUTION #7

# Prioritize high-impact v. high-frequency issues

Just because an issue is mentioned the most doesn't mean it's the most important. *"The loudest complaint isn't always the biggest problem—it could just be a minor annoyance,"* says Ryskamp. Smart brands dig deeper, using unstructured data and operational metrics to assess the true impact of issues.

CX tools like Medallia help by assigning impact scores, which combine qualitative and quantitative data to help prioritize the issues that have the highest impact on the customer experience and business outcomes. *"Our impact score blends Text Analytics with a quantitative score, pinpointing top CX drivers and often linking directly to financial outcomes,"* adds Debnar.

## Crisis Averted - Thanks to Speech and Text Analytics

**Hospitality Industry Use Case:** At one luxury Las Vegas hotel, long check-in lines seemed like the obvious problem to fix but a less frequent complaint about bathtub drainage was having a bigger impact on real business outcomes.

*"When it happened, guests didn't want to return—it was a 'can't-happen' type of problem,"* says Ryskamp. Sometimes, the less common issues are the ones that truly make or break the experience.



**Retail Industry Use Case:** A popular convenience store brand was gearing up for an exciting product launch when conversational intelligence revealed a worrying trend—a metallic taste in the new item.

*"Within hours, we acted, prioritizing food service actions and preventing a disaster,"* says Debnar. Catching the issue early saved the brand from a major misstep.



## SOLUTION #8

# Evolve your CX tech stack for smarter, faster action

Prioritizing CX effectively means not just understanding customer needs but acting on them in real time. Traditional methods like post-interaction surveys capture only a fraction of the full experience, making it difficult to detect what's truly driving satisfaction, churn, and engagement. It's time to level up with an omnichannel strategy that pulls insights from every interaction—whether it's a call, chat, click, or behavior—and instantly turns them into meaningful action. AI-powered intelligence doesn't just surface insights; it triggers alerts, prioritizes cases, and recommends next-best actions through automation and guided workflows. Outdated tools leave you guessing. The right tech stack ensures you're always a step ahead, resolving friction points before they escalate and capitalizing on high-impact opportunities.

Mallett emphasizes, *"CX isn't just about listening. It's about connecting the dots. AI instantly transforms dynamic data from customer interactions, employee feedback, and operational activities into clear patterns, insights, and recommendations. If multiple sources flag the same issue, it's likely a much bigger problem than you realize. The good news? With the right strategy and technology, you can proactively resolve issues through automated case management, trigger workflows that drive seamless resolutions, and fuel action plans that lead to lasting customer loyalty."* Debnar adds, *"AI solves problems faster than traditional methods, so CX teams can focus on what really moves the needle—without getting bogged down in complex data analysis."* With automated alerts, predictive modeling, and integration-powered workflows, your CX strategy becomes a powerful engine for action—helping you resolve issues faster, seize opportunities sooner, and consistently deliver better experiences.

## CX Tech Stack Evolution:

### Survey-Only Insights

*Skewed, incomplete,  
lagging data*



### Omnichannel Intelligence

*Captures and analyzes every customer interaction,  
generating powerful insight in real-time*



## 4 Tools to Optimize Your CX Strategy for Maximum Impact



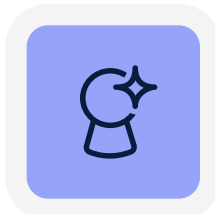
### **Behavioral Intelligence**

Uncover the real story behind customer actions detect patterns, pinpoint friction, and seize high-impact opportunities across digital channels.



### **Conversational Intelligence**

Turn every chat, call, and message into a strategic advantage mine conversations for deep insights that boost engagement, revenue, and loyalty.



### **Predictive Analytics**

Stay ahead of customer needs with AI-driven foresight anticipate behaviors, optimize journeys, and take proactive action before issues arise.



### **Generative AI**

Accelerate CX transformation with intelligent automation deliver instant insights, streamline workflows, and enhance decision-making at scale.

## SOLUTION #9

# Balance technology with human intuition

Advanced tech can uncover hidden insights, but it's human intuition that brings them to life. AI's insights are powerful, but you still need to dig deeper to understand what people are really saying—especially when making the case for big decisions and investments.

As Bloch explains, *"The best companies combine AI-driven insight with human intuition to not only understand what's happening, but why, and what to do about it."*

Combining the brainpower of both creates smarter, faster decisions that drive real results.

# Ready to take your CX to the next level?

By putting these strategies into action and tapping into the latest CX innovations, you'll have the tools to boost efficiency, sharpen your analysis, and tackle what truly matters for your customers and your bottom line.

## How Medallia Can Help

Medallia combines your most holistic experience data with the power of AI to deliver timely, prescriptive, and prioritized insights that empower teams to focus on what matters most, maximize your impact, and elevate customer satisfaction and retention.

→ Learn more at [medallia.com/analytics](https://medallia.com/analytics)