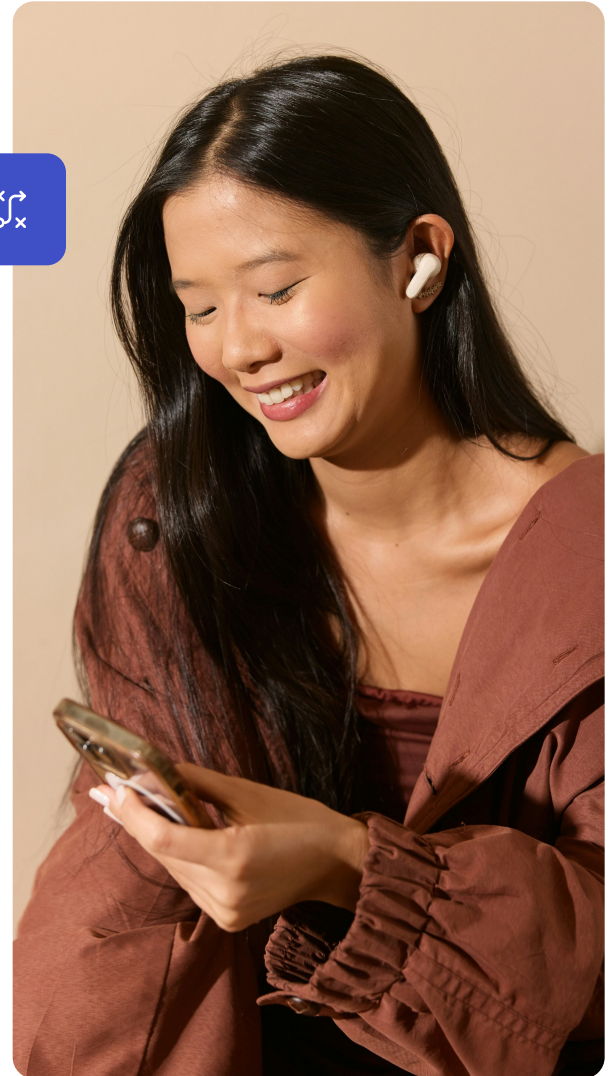


Medallia

Modern CX, Made Achievable

Your step-by-step guide for moving
beyond surveys with confidence and
sustainable success.



01

Why Omnichannel CX Is Necessary

- Why survey-only programs fall short
 - What you need instead: the modern CX playbook
 - How to define your winning “why”
-

02

How to Make It Real

- Secure sponsorship and alignment
 - Map journeys
 - Integrate data
 - Embed a culture of action
-

03

How to Make It Stick

- Measure success on three levels
- Sustain momentum and scale up
- Be confident in what's possible

01

Why Omnichannel
CX Is Necessary

From Stuck to Unstoppable

The Problem



Falling response rates and rising survey fatigue.

Blind spots from the silent majority.

What customers say and what they do don't always match.

"Omnichannel surveys" ≠ true journey insight.

Leaders are left with more questions than answers.

Time goes to dashboards and decks, not decisions and action.



The Truth:

Survey-only CX has reached its limit.

The Opportunity



Connect every signal—calls, chats, clicks, social, transactions, etc.—into one system of record.

Replace noise with clarity.

Turn insight into action in the moment, across the org.

The ROI?

Growth. Less guesswork, more revenue.

Efficiency. Cut costs, speed resolution.

Better experiences. Customers stay, employees thrive.

Reduced risk. Safeguard compliance and protect reputation.

The Action Plan

(this playbook)



Practical, achievable steps.

No boiling the ocean.

→ Stop feeling overwhelmed.

→ Move beyond surveys to signals.

→ Prove impact fast.

→ Build momentum your teams believe in and your executives rally behind.

Define and Document Your Why

If you aren't clear about why your organization needs to modernize your customer experience program, your teams won't be either, and you'll quickly slip back into silos. A solid "why" will serve as both a north star and your insurance policy when roadblocks appear.

Let's get started building yours.

Define your "why."

What's the reason your company needs to modernize CX? Include a problem statement that explains what you're trying to solve (e.g., fragmented data, lagging responses to customer issues, no clear line from experience to ROI, or teams missing the insights to fix what's really broken.)

An omnichannel CX program will enable our organization to...

.....

.....

.....

.....

Tie it to your brand promise.

If you promise "effortless," but customers repeat themselves across channels? You aren't catching it, you aren't fixing it, and you're breaking your promise. Without omnichannel CX, you can't deliver on what you stand for.

Our brand promise is....

.....

We can't deliver on it without omnichannel CX because....

.....

Define and Document Your Why

Show the cost of inaction.

Broken hand-offs. Unmet promises. Higher churn.
That's how brands lose customers and credibility.

Not having an omnichannel CX program means our organization struggles with:

.....

.....

Frame the business case in executive terms.

Make money → Capture missed sales (e.g., fixing broken digital flows).

Save money → Reduce call volume by addressing root causes.

Reduce risk → Spot compliance and service issues faster.

Omnichannel CX will help our organization...

Make money:

.....

Save money:

.....

Reduce risk:

.....

Define success from the start.

Document clear objectives to guide decisions
and fend off distractions.

Our success metrics include:

.....

.....

02

How to Make It Real

Secure Sponsorship & Build Alignment Early

Modern CX doesn't work if it's a "nice-to-have" side project. To create change and produce results, it has to be an enterprise play. That means you need executive backing and cross-functional allies who see what's in it for them.

1 Find the right executive sponsor.

You need a channel-agnostic leader (e.g., CCO, COO, or Chief Transformation) who owns the entire customer experience, not just one channel.

Their role

- Set enterprise-wide goals
- Clear roadblocks
- Secure and protect resources
- Champion customer-centric culture
- Hold accountability for outcomes and ROI

2 Align your stakeholders.

DON'T: Build from the org chart.

DO: Build from customer touchpoints.

Look at your customer journey map and give seats to leaders who own the interaction. These are the team leads who make or break the experience. Show how omnichannel CX fuels their priorities while delivering on enterprise goals

Speak their language:

- Ops → efficiency + lower costs
- Marketing → growth
- IT → simplicity
- Finance → risk reduction
- Contact Center → faster resolution + empowered agents
- Product → adoption + fewer defects
- Stores/Branches → seamless service + local loyalty

Secure Sponsorship & Build Alignment Early

3 Overcome objections.

When they say:

- “Stay in your lane.”
- “We don’t have the resources—time, people, and budget—to dedicate to this.”

Respond by:

- Showing what’s in it for them (see #2).
- Reframing omnichannel as a shared enabler, not a CX land grab.

4 Prepare for change, turnover.

Always designate a backup sponsor. Programs die when lone champions leave. Having a #2 in place will ensure continuity through leadership churn.



Map Journeys to Uncover Blind Spots

Are you drowning in feedback from one channel but flying blind in another? The only way to see the whole picture is to understand your customer journey as it actually happens.

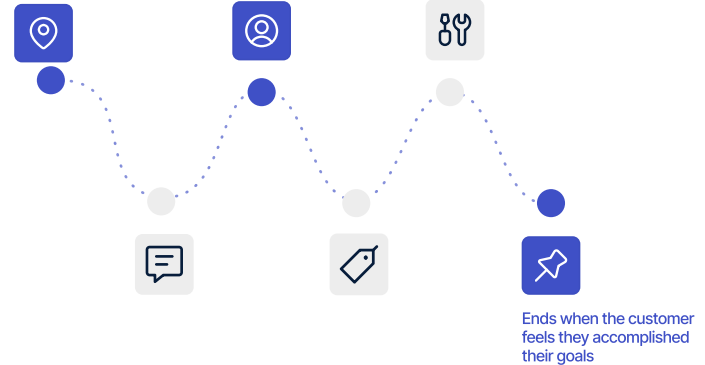
Customers don't care how you're organized. They care about outcomes—getting problems solved, making purchases, finding answers—and they expect it to be effortless.

This exercise forces you to step into the customer's shoes. You'll see where experiences break down, where you're not listening, and where better visibility could change outcomes.

Along the way, you'll quickly spot:

- **Repetition and friction:** Sticking points where customers lose patience
- **Clarity and silence:** Strong insights in some places, and nothing in others
- **Critical gaps:** Disconnects that block outcomes for customers and the business

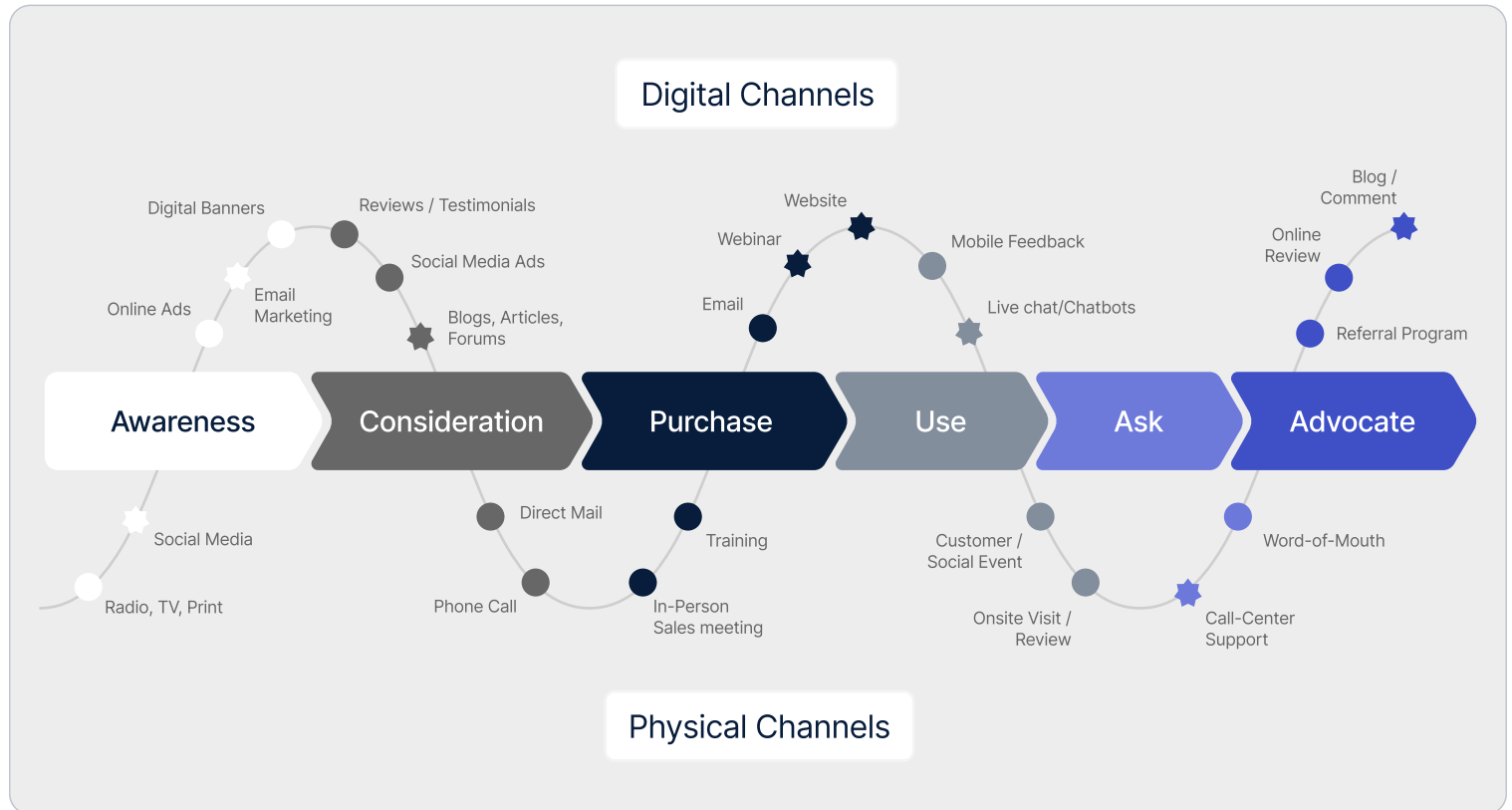
The journey starts when the customer takes an action



Pro Tip: Journey Mapping That Works

- Start with customer goals, not org charts
- Trace the real steps along the way
- Spot collisions when channels clash or handoffs fail
- Expose blind spots where you need better data or visibility

This step is critical: without journey mapping, data integration is a guessing game. With it, you know where to focus first and can build momentum with wins for customers and the business.



Integrate Data

One Win at a Time

Data integration is where many leaders freeze. It looks like a spaghetti monster of siloed systems, legacy tech, and overworked IT teams. Progress can feel impossible.

But it doesn't have to be all-or-nothing. Break it down into quick wins and big lifts. Show progress early. Build momentum. And remember: the value isn't just in collecting more CX signals, it's in linking those signals to operational and financial data to prove business impact.



Step 1: Map your universe

Grab a whiteboard and plot every system that touches customer data. Think:

- Web + app analytics
- Customer service systems (live chat, call logs, SMS, email)
- CRM + marketing tools
- Survey + research platforms
- Social + reputation management
- Sales + customer success tech
- Operational systems
- Financial systems

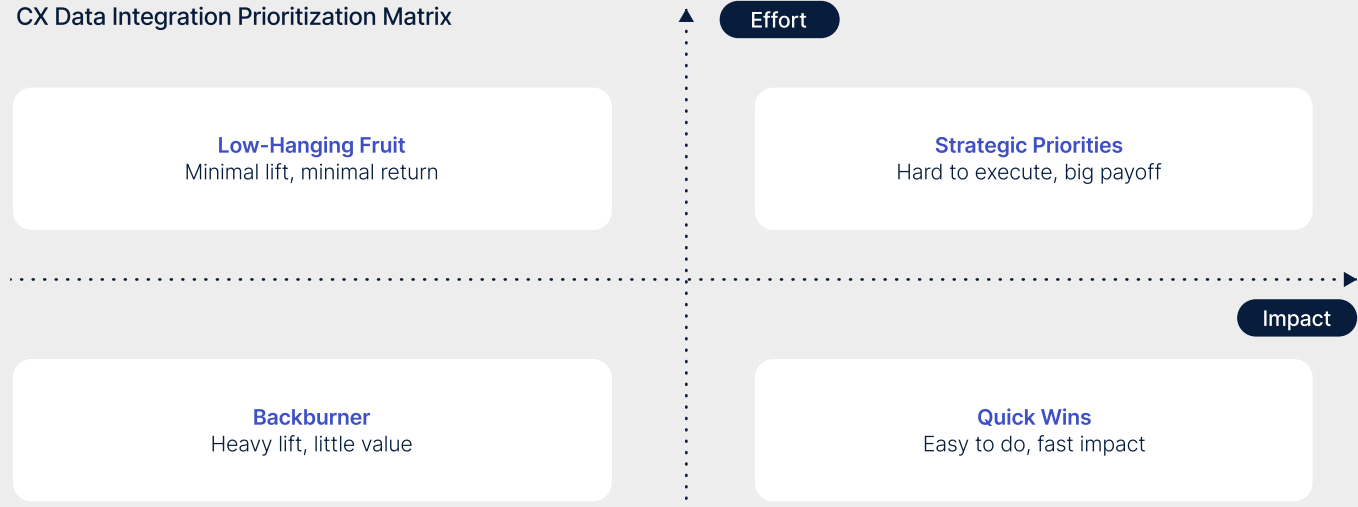
Step 2: Go beyond CX signals

Operational data (e.g., customer segment, generation, call length, resolution time) → [See how experiences differ across groups.](#)

Financial data (e.g., spend, funds under management, renewal rates)
→ [Tie CX improvements directly to business results.](#)

Step 3: Prioritize with an effort vs. impact matrix

CX Data Integration Prioritization Matrix



Step 4: Partner with IT early

Build allies. Avoid surprises. Use quick wins as proof points to unlock support for bigger lifts.

Step 5: Keep it manageable

Repeat after us: "I don't have to boil the ocean."

Create a Culture Where Insights **Drive Action**

Here's the harsh truth: Insights without action are just CX theater. Omnichannel CX only delivers when every team—frontline, digital, marketing, ops—can turn data into action in the moment. That's when culture multiplies impact.

That takes more than tools. It takes change management and a sense of ownership across the org. **How?**

1

Build role-specific dashboards that show each group their wins and impact.



2

Put useful insight in the hands of those who can make a difference.

Tip: Tools like Medallia's Frontline-Ready AI™ put secure, effective GenAI directly in employees' hands—helping them QA calls in near real time, spot emerging trends, close the loop instantly, and focus on delivering great experiences, without extra lift.

3

Make employees feel part of the mission, not subject to it.

- Celebrate wins, big and small.
- Offer ongoing training, not "one-and-done" instruction.
- Be transparent, even when progress is messy.
- Pair data with storytelling, turning numbers into narratives teams care about.

03

How to Make It Stick

Use a Crawl-Walk-Run Framework

Modern CX can feel overwhelming when you're focused on the "end state." The trick? Break it into a more manageable crawl-walk-run approach. It's not a sprint, it's a marathon. You don't need to get to "run" on day one. The momentum will compound!



Advance Your CX Maturity

Use maturity models to track where you are and where you're going and set realistic expectations with leadership.



Measure Success on Three Levels

If you only report on CX scores, you'll miss the big wins, and executives will lose interest fast. Instead, success should be built like a three-tiered cake.

Level 1: Structural + behavioral

Are different functions collaborating, sharing data, co-owning outcomes?

Level 2: CX metrics

Are you delivering the customer outcomes you spelled out on page 6 (such as resolution rates, digital completion, and CSAT trends)?

Level 3: Business outcomes

Are you increasing cost savings, revenue growth, and compliance risk mitigation? The ultimate measure of success will be achieving the objectives you listed on page 6.

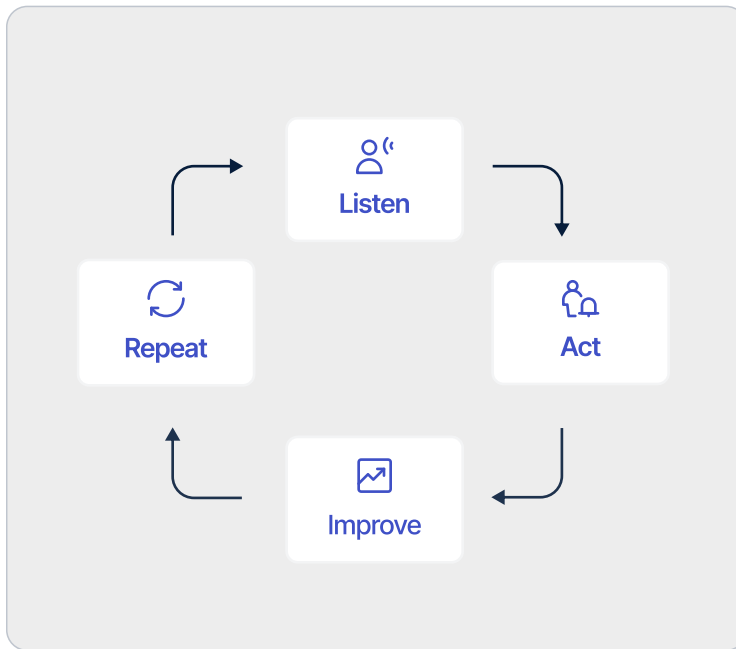
Action Items

- ✓ **Calendar it:** Schedule quarterly or biannual progress reviews.
- ✓ **Remember it:** Scores don't matter, what you do with them does.
- ✓ **Evolve it:** Adjust your metrics as you climb the maturity curve.



Sustain Momentum and Scale Up

Modern CX isn't a one-and-done project. Omnichannel programs thrive with a rinse-and-repeat cycle.



- 1 Make collaboration your engine for continuous improvement.
- 2 Embrace journey mapping as a living process, not a one-time deliverable.
- 3 Expand your data set gradually. Each new integration will add momentum.
- 4 Leverage continuous improvement rituals: Reviews, recognition, storytelling.
- 5 Keep progress visible with impact dashboards, quick-win callouts.
- 6 Build agility into the cycle: Be ready to pivot as customer needs evolve

Thank You to Our CX Advisors

This playbook is based on the guiding principles that the Medallia Experience Advisory team uses to help the world's most-loved brands create best-in-class omnichannel CX programs.



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**From playbook to proof: See how
CIBC made it a reality**

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