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The Buyer's Guide to Choosing A Best-In-Class CX Partner

CX has outgrown basic dashboards, survey scores, and slow-moving platforms. If you're already feeling the limits of your current CX setup, you're not imagining it.

This guide will help you spot the signals, cut through the vendor noise, and get clear on what "best-in-class" actually looks like before you make your next move.

Four pillars every enterprise needs to get CX right.

These aren't nice-to-haves. They're the non-negotiables. Compromise on even one, and you introduce risk, friction, and blind spots your business can't afford.

Unified Omnichannel Data
Your CX platform should capture every signal in one trusted system—no stitching, no cross-referencing, no guesswork. The right platform cuts out manual analysis and delivers faster, more accurate insights to every team.

AI Designed for Frontlines
AI only moves the business if everyone can use it. Modern CX programs need intelligence that fits every role, keeps guardrails tight, and scales cleanly—so rolling out AI across your entire workforce feels like a power-up, not a gamble.

Enterprise-Proof Architecture
Your CX system should absorb millions of signals, map cleanly to complex org structures, and stay organized through every reorg, territory shift, or product change. A best-in-class partner will have a proven track record of enterprise deployments and reliable performance.

Dedicated Support and Innovation
A best-in-class partner drives continuous product innovation and delivers hands-on customer success—so you're never left scrambling with self-serve fixes for problems the vendor creates.

Surveys don't tell the whole story. Track every signal that matters to stay ahead.

☐ Can the solution capture surveys, unstructured feedback, behavioral data, operational data, and other key experience signals from customers and employees in one place, without relying on separate licenses, data (de)duplication, or delayed data transfers?

☐ Can new feedback channels be built to automatically integrate with existing data structures and hierarchies?

☐ Are all experience signals unified in a single, real-time view so that all employees are enabled to act on complete and accurate insights?

☐ Can CRMs and critical business systems be integrated to automatically show the correlation between customer ROI and satisfaction scores?

Why it matters

Platforms built around surveys miss most of what's happening. You're left guessing about the experiences that really matter, making decisions on a fraction of the story—and paying the price in missed opportunities and wasted resources.

Medallia captures the full picture. Over 80% of the signals we surface come from non-survey sources—so you see every interaction and can act where it actually drives impact.

"By integrating diverse data sources—often without common data elements—Medallia's AI-powered text and data analytics provide a unified, omnichannel view that reveals deeper customer insights. As we bring more data sources into the mix, we'll re-evaluate if we really need to ask a (survey) question."

Matt Schweikert, Platform Owner, VOC/CX
MetLife

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Act fast, fix faster with AI that pinpoints what matters most.

☐ Are all insights, including AI-powered insights, immediately available as clear, role-specific, actionable priorities for all teams—from the front line to the C-suite?

☐ Do advanced analytics that enable prioritization (Impact Scores, Automated Scoring, and Risk Flagging, etc.) come out-of-the-box?

☐ Does the solution offer an AI-powered coaching? And an accountability loop where managers can see the outcome and automatically track the positive impact back to the customer's next behavior?

☐ Are the most advanced AI-powered capabilities accessible to all customers? Or are they reserved for select power users and high-tier accounts?

☐ What governance and transparency safeguards exist?

Why it matters

AI is only as effective as the actions it drives. For CX, that means helping frontline teams—store associates, branch staff, support reps—see what matters most and act immediately.

Medallia's Frontline-Ready AI™ delivers real-time, context-rich intelligence directly in workflows. It gives every employee the insights they need to fix issues, seize opportunities, and make the next move with confidence. And our human-in-the-loop approach ensures AI supports your best judgment instead of replacing it—so adoption is fast, and impact is real.

"Medallia's alert system allows us to define smart criteria by combining unsolicited signals, sentiment, and direct feedback when available. These alerts are delivered in real time to the right teams, helping us respond quickly and proactively to our customers."

Paloma Paraja, Customer Experience Manager
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Handle every signal, adapt to every org shift, and stay aligned across your enterprise.

☐ Are there limitations on the number of organizational hierarchy levels or unique data points that can be unified and visualized in real time?

☐ Does the system automatically maintain accurate reporting and data access when employees change roles, transfer locations, or when organizational structures evolve?

☐ "Does the platform provide enterprise-wide reporting across all levels of your organization?

☐ Do the platform have granular controls that allow visibility and permissions to be configured by role, team, or hierarchy level?

☐ Is the platform's architecture designed to unify solicited and unsolicited feedback signals, or is it limited to primarily survey data structures?

Why it matters

When a CX platform is built for smaller organizations and old-school survey setups, you're stuck exporting and cleaning data instead of acting on it. It can't handle all your signals, and it certainly won't give a full, enterprise-wide view.

Medallia flexes with your enterprise, turning every signal into a move you can trust. As a trusted global partner, governance, security, and compliance are non-negotiables.

"The effective integration of channels across marketing, sales, and service activities is critical to delivering a positive, brand-reinforcing experience at every touchpoint in the customer relationship. Medallia provides us an extendable set of capabilities for a consistent, enterprise-wide view of customer feedback to analyze and act upon from many listening posts.

**Rob Goodman, Vice President, Enterprise Customer Experience Officer
Pacific Life**

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Hit the ground running with a partner that innovates, supports, and turns action into ROI. Fast.

☐ Is a live production sandbox environment included to test changes without disrupting customer programs?

☐ Does the solution require substantial internal resources for implementation, maintenance, and advanced insights?

☐ Are in-house strategic advisory and industry expertise provided? Or is guidance limited to technical support?

☐ Will the vendor be able to fulfill product feature requests and maintain product availability and support required for the business?

☐ Is there transparency in the vendor's long-term direction and innovation strategy?

☐ Does the vendor have a successful history of integrating acquired solutions?

Why this matters

Partnering with the wrong vendor adds risk, slows progress, and drives up costs. Disconnected tech stacks, delayed integrations, and DIY workarounds leave your team juggling complexity instead of driving results.

Medallia gives you one unified platform, relentless innovation, and enterprise-grade reliability. Every investment goes toward making your programs smarter, faster, and more effective—so you hit ROI faster and with confidence.

"We consider Medallia our partners, who bring their collective best to serve as an extension of our team, and we are truly better off because of them. They support our vision, even when there isn't an out-of-the-box solution to our request. Having a professional services team who continues to deliver over a long period of time is a key differentiator for Medallia."

Vinzia Gargano, Senior Director, Head of Brand Strategy & Insights
Jackson Hewitt

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If CX is a priority, don't settle.

While others stitch together data and ship flashy AI with no substance, Medallia gives you:

- Every signal in one place. No blind spots, no guesswork.
- Frontline-Ready AI™ that drives action, not dashboards.
- Enterprise-grade architecture trusted by the world's most complex organizations.
- A true partner, with innovation and support that scales as fast as you do.

This is why global leaders choose Medallia—and why Forrester and Gartner consistently rank us at the top.

Explore what sets Medallia apart and book your demo.

See the Medallia difference