

DISCOVERY DEMO

# Actioning vs. Analysis: Managing Customer Journeys in the Moment



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# Safe Harbor

Friendly Reminder

All product features and delivery dates mentioned represent current product development expectations only and not a delivery commitment. These features may not be delivered in the indicated time frame or at all. Customers should base their purchasing, administrative, and configuration decisions solely on functionality that is currently available. All information in this presentation is proprietary & confidential information of Medallia and not for redistribution.

# Companies collect customer data, but don't see return on investment

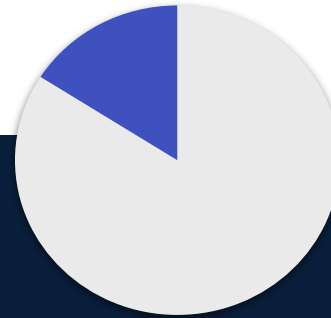
**78% of companies**

state technology or customer  
data is very important to CX



**Only 16% of companies**

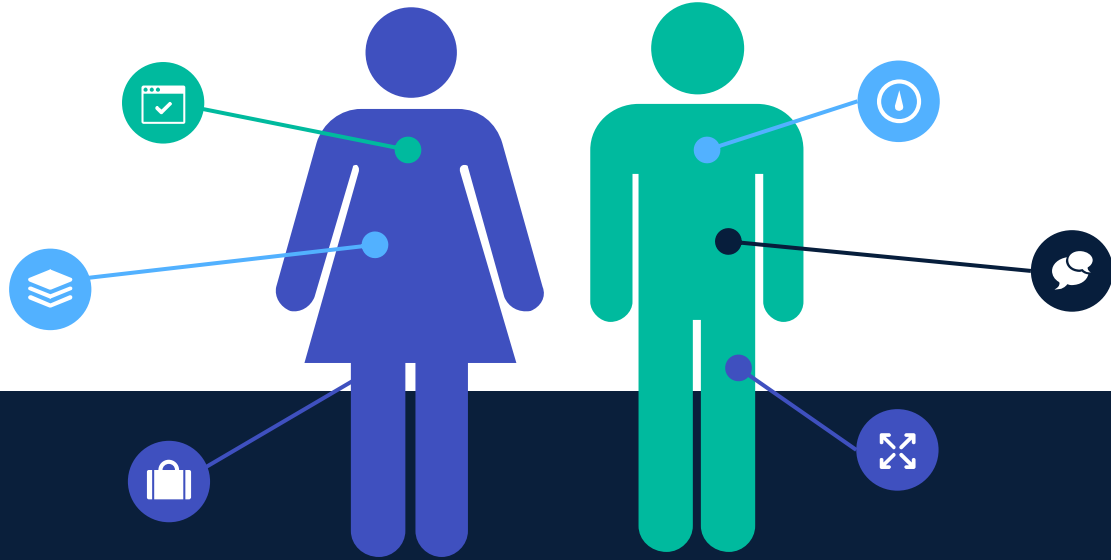
obtain significant value from  
the data collected



## What accounts for the gap?

# The actioning vs analysis gap

How can companies make customer data work for *them*?



## Taking an action-first approach

#### AN ACTION FIRST APPROACH

## A true action-first approach requires three things:

- **A journey with a clear goal** that benefits both the customer and the brand
- **Real-time collection of data** that is relevant to customers' individual experiences
- **An activation layer** that can combine this data with historical customer data for real-time actions



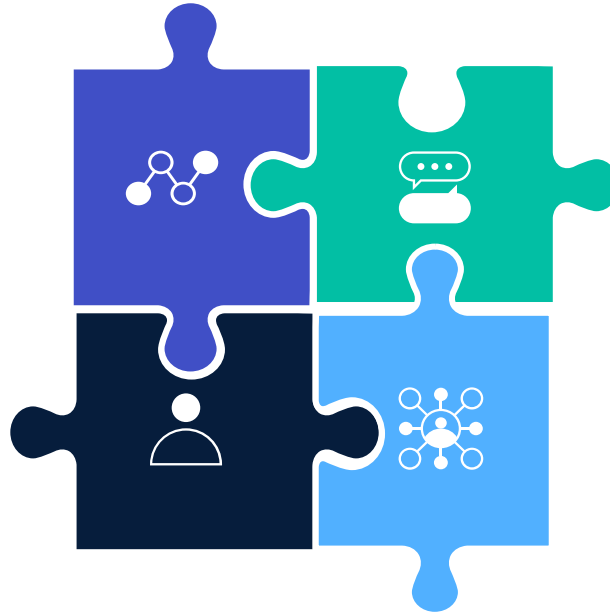
# Activating the right customer data to take the right actions

## **ANTICIPATE WHAT PARTICULAR JOURNEYS REQUIRE**

What experience makes sense within the  
context of this journey flow?

## **LEVERAGE EXISTING CUSTOMER DATA**

How can you put everything you know  
about your customers to work?



## **UNDERSTAND WHAT HAPPENS IN THE MOMENT**

What is the customer's immediate  
experience?

## **DELIVER THE RIGHT EXPERIENCE AT THE RIGHT TIME**

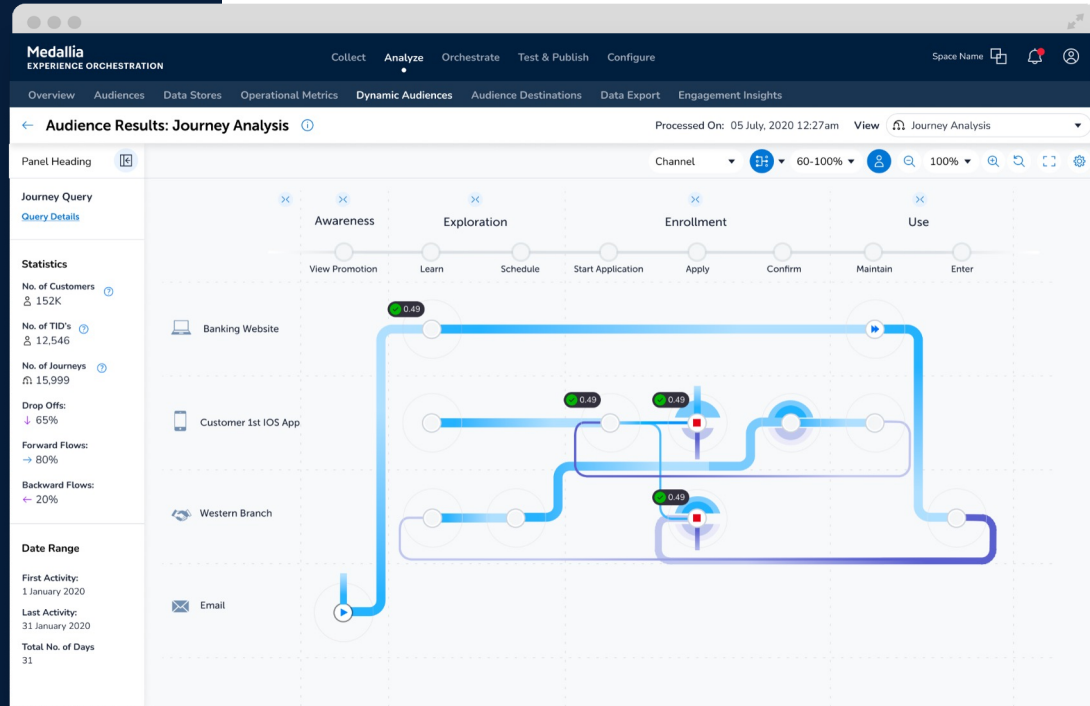
How can you offer up the next best  
experience for that customer?

# What we'll learn in today's demo

How brands can empower customers to complete their journey / task

How digital teams can focus on initiatives that make an impact

How to scale success by looking at and activating omnichannel data







# Product Demo

## Recap to taking an action first approach

Anticipating customer needs and setting up actions so they can convert in that visit

Using omnichannel data to quantify the business value behind CX initiatives

Spearheading aggregate-level change to help future customers convert

*Agents equipped with information for next best experience*

*Digital channel modified to remove any friction*



# Taking an action first approach to reduce costs

## Challenge

A major telecommunications company in the APAC region aimed to provide a best-in-class customer experience while balancing increasing costs.

## Solution

Medallia was implemented across digital, IVR, and frontline employee systems to provide journey-aware actions for every customer interaction.

These actions improved the customer experience by enabling more customers to resolve their issues through their preferred channel.

**Medallia**



**5.5m+**

Next Best Conversations  
served per day

**550+**

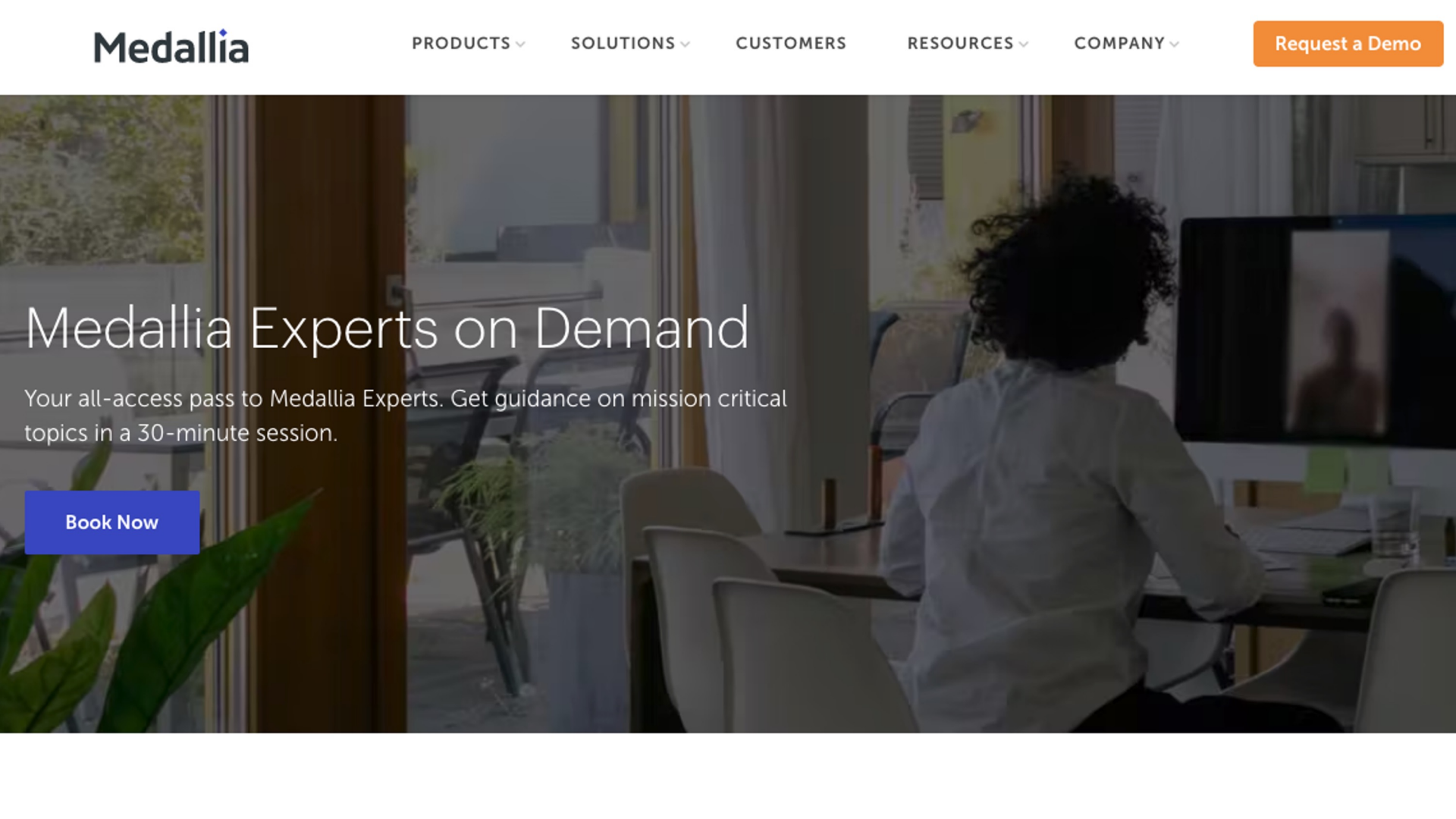
Live Use Cases  
(and growing)

**70m+**

Dynamic Actions  
ingested daily

**93m**

Weekly optimisations  
decided in real-time

A background image showing a person with curly hair, seen from behind, sitting at a desk and participating in a video conference. The person is wearing a light-colored shirt. The desk has a large monitor displaying the video call, some papers, and a glass of water. A large window in the background shows an outdoor area with a patio and some greenery. The overall scene is dimly lit, with the primary light source being the computer monitor.

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