



Expert Insights



Ready, Set, Go: How to Launch a Customer Experience Program

Medallia

Introduction

So You Want to Create a Customer Experience Program?

Think about the innovative players in your field. The agile organizations that manage to move in lockstep with shifting customer expectations. The ones that can predict what consumers want and need before the rest. They have a competitive advantage: their customer experience.

They've built strong customer experience programs that enable them to listen to the voice of the customer and learn, analyze, and predict, and to empower their people to act in the moment to improve customer satisfaction, loyalty, trust, and lifetime value.

The case for customer experience, by the numbers¹

- Organizations with a superior customer experience generate nearly **6 times** the revenue of customer experience laggards
- **66%** of companies compete on customer experience
- **73%** of consumers say customer experience influences brand loyalty
- **77%** of consumers say poor customer experiences affect their quality of life

¹ <https://www.forbes.com/sites/blakemorgan/2019/09/24/50-stats-that-prove-the-value-of-customer-experience/?sh=469d91fb4ef2>



If you're serious about transforming your organization, then you need a strong and empowered customer experience program. That requires baking CX into your culture. And who sets your culture? Your leadership. That's why you need leadership buy-in from the very beginning, as having the support from the get-go is so critical in making sure that this is successful.”

Lee Becker

SVP and General Manager,
Public Sector at Medallia

In this guide, we'll walk you through the why, the what, and the how of getting buy-in for, launching, and optimizing your customer experience program following the best-in-class examples and insights from seasoned customer experience leaders, all with real-world experience creating programs at top organizations across retail, financial services, healthcare, government, and more.

Key Customer Experience Terms

- 01. Customer experience (CX)** Customers' perception of their experience with a brand or organization over time, which results from every interaction they have from the website to customer service to purchasing a product or service, etc. This allows companies to drive loyalty at every point along the customer lifecycle by capturing and analyzing signals to predict behavior, take action, and create experiences that lead to customer loyalty.
- 02. Customer experience management (CEM)** This is the practice or discipline of how a company takes control of how it designs and optimizes interactions with its customers. CEM is about understanding key journeys from the customer's perspective, and then engaging all relevant internal teams to improve these journeys and interactions.
- 03. Customer Experience Strategy** A documented high-level approach and top priorities for achieving desired outcomes. This might include specific tools and tactics companies plan on using to design and optimize interactions with customers, along with a timeline.
- 04. Customer Signals** Data that helps to describe what customers are experiencing, thinking, feeling, and doing, collected from a wide range of direct and indirect experience data sources (for example, surveys, transactions, chats, voice calls, website visits, social media, and more).
- 05. Voice of the customer (VoC)** This is the process by which customer feedback is collected and then shared inside an organization. Companies collect the thoughts, feelings, and sentiments of customers via surveys, social listening, customer support, and other channels to learn more about — and find ways to improve upon — the customer experience.

[Click here for a complete glossary →](#)



Meet the Experts



Lee Becker, SVP and General Manager, Public Sector at Medallia

Becker brings over 20 years in regulated industries and the public sector in various strategic and operational capacities in which he has routinely been called upon to lead organizational change across the spectrum of people, process, and technology. His experience includes developing award-winning programs and capabilities in support of customer, patient, and employee experience at the U.S. Department of Veterans Affairs and Department of Defense, as well as co-leading the White House cross-agency priority goal on customer experience for all government agencies.



Zack Hamilton, Principal and Global Head of Retail Experience at Medallia

As the Head of Customer Experience & Sales Strategy at Aaron's, a major North American retailer, Hamilton oversaw customer experience strategy, customer service operations, and sales strategy — focusing on "building for their customers, by their customers" utilizing the Medallia Experience Cloud. He understands the dynamic nature of customer and employee experience within omnichannel organizations and how to utilize customer and employee feedback to innovate, drive digital transformation, scale initiatives across 1,700+ retail stores, and lead cross-department teams.



Toni Land, MBA, BSN, CPXP and Head of Clinical Healthcare Experience at Medallia

Land has spent more than 30 years in healthcare across a number of settings ranging from nursing, home care, medical practice, performance improvement, education, and management. This time allowed her to serve and impact

many areas of patient, family, and employee experience, enabling direct engagement with the many complex areas of healthcare to implement and sustain change. Prior to joining Medallia, she was Chief Patient Experience & Quality Officer at the Medical Center Health System and Director of Patient Experience at Prisma Health.



Jodi Searl, JD, PhD, Vice President for Industry Solutions and Global Solutions Principal for Powersports and Recreation at Medallia

Searl brings a wealth of industry experience to her role where she specializes in the complex powersports and recreation vertical for all OEM brands and manufacturing with an OE to dealer to customer business model. Prior to joining Medallia, she was the Head of Global Dealer Training for the Harley-Davidson Motor Company, where she led the strategic transformation and operationalization of customer experience for the global dealer network. A lifelong motorcycle rider and outdoor enthusiast, Searl is a passionate consumer who loves working with clients to build a customer-centric strategy that delivers business results.



Bill Staikos, Senior Vice President for Industry Solutions at Medallia

With more than 25 years in financial services and a primary focus on driving customer and employee experience excellence, Staikos is a recognized client advocate with proven expertise in envisioning and executing holistic customer-led strategies. Host of the award-winning podcast with listeners in over 90 countries, Be Customer Led, Staikos previously served as the Head of Customer Experience at Freddie Mac, where he was responsible for the creation, execution, and measurement of the customer experience strategy across Freddie Mac's \$2.3 trillion single family guarantee portfolio. Prior to Freddie Mac, he was Head of Customer Experience Analytics & Strategy for Chase's Home Lending business.

Part I: Get Ready

Making the Case for Your CX Program

The heavy lifting of launching a customer experience program — the real work — starts long before you actually build the program. This involves ensuring everyone within the organization is invested in customer experience, starting at the top.

Zack Hamilton, who launched the customer experience program at Aaron's, shares how he went from struggling to get support for customer experience initiatives to becoming an influencer within the organization.

"What I struggled with the most at Aaron's was trying to get strategic alignment and prioritization when I worked through vice presidents of the different business units or departments," he explains. "So what I quickly pivoted to was finding out what every leader of every department was focused on — our long-term strategic initiatives. I found that if I could anchor our experience strategy around that, then I knew that I could become an influencer."



7 Reasons Every Organization Needs a CX Program

01. To listen and learn from customers

"Listening to customer signals is critically important to business success, not only to the current state of the business but the future state of business." – Jodi Searl, Global Solutions Principal at Medallia for Powersports and Recreation, who led the strategic transformation and operationalization of customer experience for Harley-Davidson Motor Company

02. To increase revenue

"Whether that's by reducing operational costs by finding friction in the customer journey that's causing revenue leakage or by pinpointing ways to create positive experiences that drive new revenue potential – ultimately, it's not only about driving repeat business but also getting new business in the door." – Bill Staikos, Senior Vice President for Industry Solutions at Medallia, who served as the Head of Customer Experience at Freddie Mac

03. To bolster workplace culture and employee engagement

"When you show employees the positive, direct impact they have on the customer and their experience, that's rewarding, and you create a direct connection by demonstrating meaning in the work that they do." – Staikos

04. To deliver stronger outcomes

"Positive patient experiences are the foundation to positive health outcomes. So every healthcare organization should be looking at ways of removing barriers for our patients and our families, so that they have access to care and to the caregivers that they need in order to have improved health." – Toni Land, MBA, BSN, CPXP and Head of Clinical Healthcare Experience at Medallia, who was the Chief Patient Experience & Quality Officer at the Medical Center Health System and Director of Patient Experience at Prisma Health

05. To improve loyalty

"You want patients and families to choose your hospital or your medical practice or, even if you're a payer, your insurance, every time. You want them to choose you and you want them to have their families choose you and their friends choose you, so you want to create that loyalty, which comes from experiences that they have when they encounter your organization." – Land

06. To carry out the organization's mission

"When we think about the public sector – the type of agencies and the missions of those agencies – the purpose of government is to serve the people, to be of the people, by the people, for the people. The whole purpose of agencies is to execute the will of the people. That's where customer experience comes in. When we think about applying customer experience into the government space, customer experience programs allow agency leaders at every level to know that the services and programs that they are providing are actually meeting the needs of those that they serve – that they're providing a maximum value to the taxpayer and that the services and programs are effective, efficient, and emotionally resonant." – Becker

07. To remain relevant and the brand of choice for consumers

"Leading brands go to market, compete, and take market share not necessarily by innovating great products but by truly delivering consistently on the experience. So many brands spend millions of dollars investing in who they are as an organization, what they stand for, and how they're going to add value to the consumer's life, but then they do a very poor job of investing in and truly understanding what that experience is and how they're delivering on that brand promise. If any brand wants to stay relevant, experience truly is the battleground for loyalty today." – Hamilton

How to Get Buy-In & Ensure Alignment

Identify the right stakeholders, who need to be involved and offer their buy-in, right from the start. The C-suite and the CEO should be at the very top of the list. Without this critical buy-in, CX leaders will be hard pressed to achieve success.

Get your stakeholders on the same page by defining what customer experience means across the entire organization. Ask the CEO and C-suite what they think customer experience means and what business challenges the organization hopes to address through customer experience.

- What do we mean when we say customer experience?
- What are the challenges that we're trying to solve within the organization?

Connect your experience strategy to the company's broader strategic initiatives. Ask your CEO and C-suite to answer the following questions:

- What are the strategic initiatives for the brand over the next 12 to 24 months?
- Do we have a revenue challenge?
- Do we have a problem with customer churn?

Create a change management plan that's designed to deliver long-term outcomes. When you start designing and implementing your program, make sure that you visualize it as a long-term initiative that will involve every aspect of the organization across internal and external stakeholders and that everyone involved knows what's expected of them.

Demonstrate the WHY and the ROI of investing in customer experience. "Make sure that everyone is invested in the idea of customer experience and understands the bottom-line impacts — the ROI — of investing in a customer experience program," says Searl. Land recommends having documentation that shows how customer experience strengthens business and customer outcomes, customer loyalty, and market share.

Get everyone on the same page about how to measure CX. Which metrics will help you track your customer experience efforts and outcomes and which will help demonstrate you're delivering results that tie back to the company's strategic initiatives?

Part II: Get Set

The Essentials of an Effective CX Program

During this phase, you'll create the foundation for your program, starting with building a framework for governance, getting the tools you need in place, bringing together the right team, and determining the right metrics to track your progress against.

- **The Framework:** The critical pillars of any CX program
- **The Tech:** The tools and integrations that will set your organization up for success
- **The Team:** How to build out your CX team
- **The Metrics:** Which KPIs matter most when measuring the customer experience

The Framework

According to Hamilton, successful customer experience programs have these five pillars in common: Strong formal governance to hold everyone accountable and empower agile decision making, an executive sponsor to champion the program, clear communication about the organization's "why" for prioritizing customer experience (why it's important, why it matters), training, and change management strategies to instill a culture of customer experience excellence.

Pillars of CX Excellence: 5 Keys to a Strong Foundation

01. Governance

A strong process is necessary for guiding the organization in identifying accountabilities across specific teams and individuals and enabling effective decision making.

02. Executive Sponsorship

Critical to program success, executive sponsors champion the effort for the organization, remove roadblocks, enable budgeting and prioritization, and typically maintain accountability for program outcomes and ROI.

03. Internal Communication

A key component of any effective change management initiative, a communication strategy should enable awareness, reinforce program value, and align the organization on a common vision. Communication should occur indefinitely (no defined end date), beginning before program launch.

04. Training

Effective training strategies should hone in on skills development, applicable to both technology use as well as reinforcement of desired behaviors. Training should consistently reinforce key messaging and program value.

05. Managing Resistance

Plan for pockets of resistance throughout the organization. Encourage desired behaviors and adoption through positive reinforcement techniques, formalized accountabilities, and consistent, clear communication.

The Tech

Here are the tools, capabilities, and integrations that customer experience leaders rely on to run their customer experience programs.

Customer experience management platform

A successful customer experience program requires a comprehensive customer experience management platform that supports the following functions:

- Capturing insights from customers via surveys and other channels
- Integrating data from a range of customer touchpoints and sources, such as customer signals from your organization's financial data, operational data, behavioral data sources, and more

Multichannel support

In the past, email has been one of the primary ways that organizations have communicated with customers. However, there are more channels where customers are likely to engage, which is why thinking multi-channel — and having the support in place for multi-channel interactions — is key to success, according to Land.

"I'm a big advocate for what we call 'equitable listening,' and part of the concept around that is opening up enough channels to get feedback from patients and families in order to inform your strategic design," she explains. "If we say we want to hear the feedback, then it's critical to provide enough ways for patient voices to be heard."

Capturing the voice of the customer is crucial across every industry, and the future of CX is about making customers feel known across all interactions, whether that's in person, via customer support, or digital channels.

"It's important to ensure your tools enable support for key channels like SMS, video, and other digital communication channels," she adds.

AI and text analytics

Organizations must do more than simply collect customer feedback and data. To understand and elevate the customer experience, they also need to translate the data into actionable insights. That's where AI and text analytics can help — with these technologies, brands can drill down into the themes and trends hidden within the data.

"AI and text analytics are where the true differentiators come in," says Searl. "Because they allow you to pinpoint what you really need to do to impact the customer experience and to help drive overall outcomes."

Integrations

Your customer experience management platform should be able to connect to your other key customer and internal systems, including your:

- Customer relationship management (CRM)
- Customer data platform (CDP)
- Knowledge management (KM)
- Data warehouse
- Electronic health record (EHR) (for healthcare)
- Digital analytics tools (Google Analytics, Adobe Analytics)
- Internal collaboration tools

CRM + experience platforms = better together

Brands that integrate their customer experience and CRM platforms are able to connect what actions their customers are taking (CRM) with how their customers really feel (customer experience management platform).

"For instance, if your customer experience management platform identifies customers who are having a great experience and who are promoters, with a CRM integration, these insights can be used to power segmented, automated referral campaigns to these advocates," says Hamilton.



The Team

Where customer experience lives can vary widely from one brand to the next. That said, it often lives within marketing, product, customer service, or — as part of a recent trend over the past decade or so — as an individual standalone customer experience division.

Ultimately, organizations will be best served by giving customer experience a home wherever the team can have the greatest influence and deliver the strongest results for the business, according to Searl.

"The program that I was involved with started with a retail transformation group, and that was more of a project group that was built up around exploring what Harley-Davidson needed to do in order to be a luxury retailer and what the brand needed to build out from a capability standpoint in order to be perceived as a global customer experience leader in the retail space. Next, there was a division that was built out to realize that work," she shares.

The execution was handed over to a group that would have the greatest impact on customer experiences. They were technically not employees of the Harley-Davidson Motor Company, but employees of individual dealerships in over 100 countries.

Because customer experience happens everywhere the customer interacts with your brand, Searl believes the true success of customer experience programs hinges on "making sure that you can influence the people who are really where the rubber meets the road when it comes to customer interactions, without necessarily having direct authority over them."



The Metrics

There's no single right answer when it comes to choosing which metrics your organization should focus on. Each company can measure their overall customer experience and the impact of customer experience initiatives differently.

"Get very familiar with the metrics that your company cares about — engaging different stakeholders at a senior level to understand what the most important metrics are for that company," says Staikos. "Take your CFO to go get a cup of coffee, or have a virtual coffee. Take your chief HR officer to do the same thing. Use that time to understand what metrics are important to them, and why, and the types of experiences that you're going to need to improve in a meaningful way, in the journeys that your customers engage your business through every day."

Here are some ways to measure the impact of your customer experience initiatives on customer and overall business outcomes.

The Best KPIs for CX



Best Overall: Your Choice

"Whichever metric inspires you to take action, that's the metric that you should use," says Hamilton. "The best KPI for your business is the one that demonstrates the ROI for the actions you've taken to influence the customer experience, so my favorite metrics are those that demonstrate the ROI of any action taken."



Best for Benchmarking: NPS®

"If a brand really wants to be able to benchmark their performance, Net Promoter Score® (NPS) is the most highly adopted customer experience metric. You'll be able to more ritually benchmark yourself against your competitors," says Hamilton.



Best for Measuring Responsiveness to Customers: Response to Alert Time

"Response to alert time is really important because if you ask a customer how they feel, or what they think, and you give them a platform to say something, and they ask for follow-up, the very worst thing you can do is not follow up with them," says Searl. "That's why response to alert time is a key behavioral indicator to measure and track."



Best for Healthcare: Measures of Courtesy, Respect

"In my past, we honed down our metrics to those related to communication, metrics around courtesy and respect. To do that, we asked questions like, 'Did we listen?' 'How well did we listen?' and some questions around understanding to make sure that the patient or family on that other side understood," says Land.



Best for Government Agencies: Trust

"In government, we use trust as the key metric because we know that citizen trust in our government is a huge factor in determining a positive experience," says Becker.



Best for Asking Customers to Measure the Customer Experience: Effectiveness, Ease, Emotion

Becker encourages customer experience leaders to assess their effectiveness by asking customers directly:

- 1) How effective are our organization's services, products, or processes? Do they meet your needs and intent?
- 2) How easy is the experience? Can anything be done to improve our products, services, or processes?
- 3) How do our products, services, or processes make you feel? This gets into the emotional aspect of the customer experience.



Best for Measuring the Impact of CX on Business Outcomes: Operating Margins, Earned Growth Ratios, Expense Ratios

"Improving customer experience boils down to three things: driving revenue, creating operational efficiency, and creating a culture that is more focused on the customer. To understand your success, you need to understand the business metrics associated with those three elements," says Staikos.

Start by looking at measures of profitable growth and revenue efficiency, such as earned growth ratios, operating margins, and expense ratios.

But ultimately, "it's important to understand which financial, operational, and cultural metrics are important to your organization specifically, and get familiar with those, and then tie those back to what customers are saying and see where you can have an impact, and how you're going to measure," he adds.

What to keep in mind when evaluating which KPIs to track

Understand the differences between leading indicators vs. lagging indicators

"If you improve revenue, operational efficiency, and the customer journey in ways that drive leading indicators," says Staikos, "then your lagging indicators, like CSAT and NPS, will also improve, as your customers invariably will be happier with you."

Keep track of both global KPIs and department-level KPIs

Consider your audience. Your C-suite and board may be more concerned about "enterprise-level metrics that indicate trends, while individual regions, divisions, departments, or colleagues may be more motivated by and interested in more specific metrics related to their area," says Land.



Part III: Go

From Launch to Year 3 and Beyond

Our experts recommend this crawl-walk-run model for building your CX program over three years.

01

Goal: Capture the Right Data and Analyze It

- Rationalize disparate platforms into an integrated solution
- Analyze signals at scale, seamlessly
- Connect to key platforms to create a 360 degree view of customers
- Act on feedback when it matters, not when it's too late

02

Goal: Leverage Data Automation to Deliver Personalized Experiences

- Expand signal capture to identify 100% of interactions
- Use prescriptive analytics at scale, not just predictive
- Deliver next-best experiences in the moment
- Engage product teams to drive productivity and efficacy

03

Goal: Create a Truly Connected Experience

- Optimize within and across the entire employee lifecycle
- Identify employee behaviors that lead to great customer experiences
- Turn employees into innovation catalysts via crowdsourcing

Year One

#1: Get your customer experience data in order

- Look at historic data
- If you don't have any historical data, start collecting new data to create your baseline
- Connect to key platforms to create a 360 degree view of your customer. Capture not just direct customer feedback, but indirect signals too

"Before you get started launching any initiatives, you need data to inform your priorities and then, once you've started, to monitor progress and to report it to your team members, your C-suite, your board members," says Land. If you don't have a customer experience management program platform or formal way of collecting data, that's the very first place to start, she adds.

If you do have data and systems that are capturing customer feedback and signals, that's the next step — bringing all of your customer experience data into one integrated system, according to Staikos.

"Work on integrated signal capture, bringing disparate insight platforms into one integrated solution, so you're not piecing together insights from multiple platforms like Salesforce and Adobe, which is really critical in that first year to 18 months," Staikos explains.

#2: Get a clear picture of the current state of the customer experience

"You need to be able to seamlessly analyze all of your customer signals at scale in real time, and you can only do that through platforms that offer integrated AI and machine learning capabilities," says Staikos.

#3: Establish your priorities and goals for the year

- Refer to your historic data and analysis
- If you don't have historical data, look at current best practices as a place to start

Land recommends looking at your baseline data and creating a goal for a percent improvement over your baseline data for the year. Then start tracking that on a regular basis. "Ideally, this is in real time in order to continue to see what your quarterly progress looks like," she adds.

#4: Don't try to boil the ocean

"I would recommend getting really tight hypotheses, identifying areas where you can have some quick wins and good success stories to tell early on," says Searl. "If you can prove your customer experience impact with data early on, you can get traction, and that helps encourage people to believe in what you're doing and drive an overall impact to the bottom line."

#5: Educate your people

"Make sure that everybody is aware of what the expectations are from them," says Searl.

"If you're introducing a new initiative, everyone should know what the desired outcomes look like, sound like, and feel like," says Land. "When people can articulate those three things, then you know you have communicated expectations effectively and that everyone is on the same page moving forward in the same direction."

#6: Stay the course

"It's very important for team members not to feel like your efforts are just the flavor of the month, but that these are truly behaviors that we're incorporating because they will improve the outcomes for the patients and families we're serving and ideally make work better and easier for us too as the caregivers," says Land.

#7: Track your performance

Make sure to track the goals you establish for the first half of the year — and ideally the whole year — to see the full impact.



A Patient Experience Program Launch Story

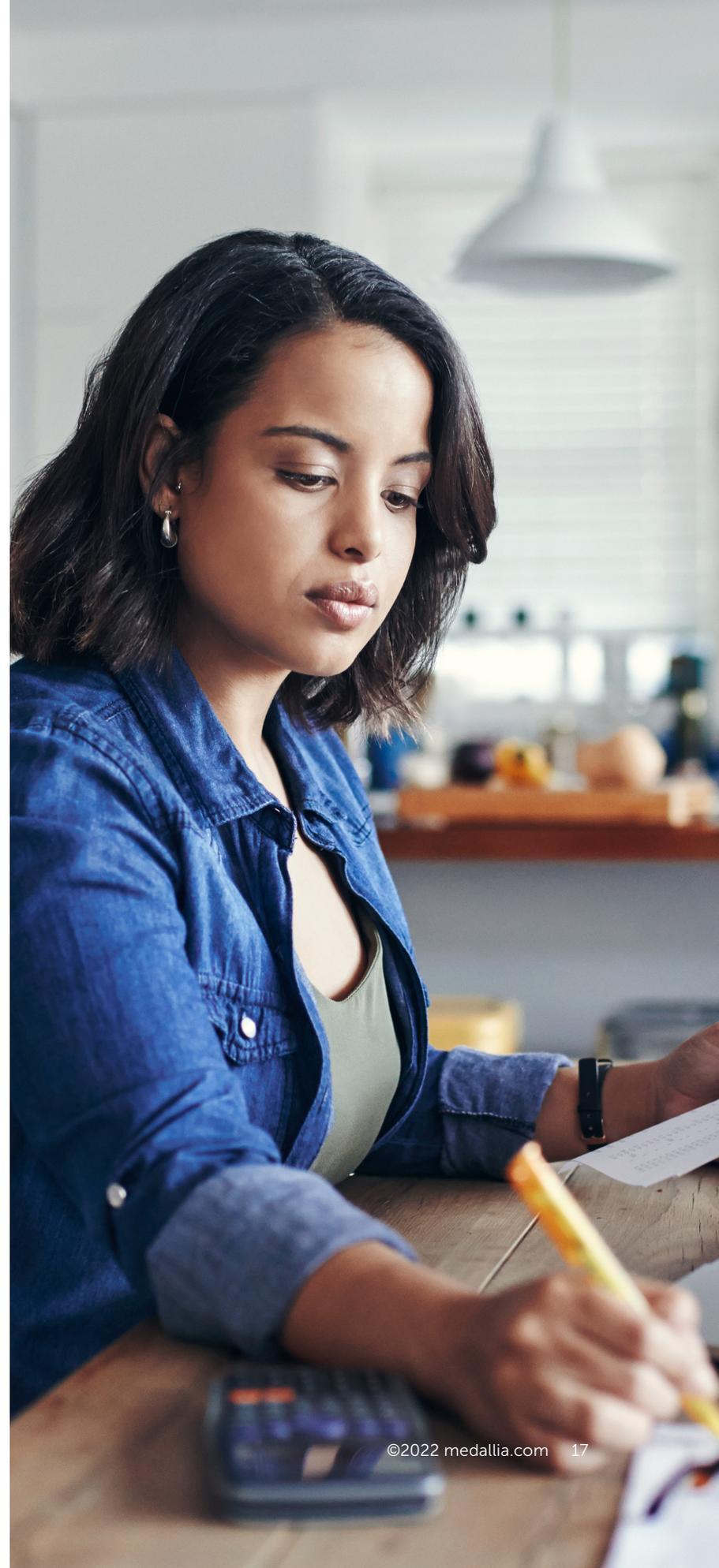
"At one of my organizations, we put together our strategic plan, and had a multidisciplinary team that actually included a couple of our patients' family members who helped us establish goals. Our goal was percent improvement over baseline. We established three goals and measured them over the course of that first year.

At that time in my career, I didn't have access to real-time data. So I was taking data that was easily four- to six-weeks old and analyzed that data kind of retrospectively to make changes and course correct, but we were always looking in the rearview mirror. Now when I coach teams around implementing their strategic plan, I explain why it's essential to get real-time data, so that you and your team have better insight into your overall performance and outcomes," Land shares.

Year Two

By the end of the first year, you should have quality baseline data and a solid foundation in place to continue to advance your efforts. Key areas of focus for this second year include:

- Increasing customer signal capture, ensuring all of your organization's customer experience data is being collected and integrated into one central system
- Leveraging prescriptive analytics at scale — not just predictive analytics — to prescribe next best actions to improve the customer experience
- Building out action plans to respond to trends and opportunities you've pinpointed through your data collection and analysis
- Creating a continuous improvement process, in which the team is constantly reviewing the data and updating processes in response
- Expanding your learnings to new areas and addressing additional points of friction to elevate the customer experience
- Understanding how to deliver the best customer experiences in the moment and throughout the journey



Year Three

By year three, organizations can expect to have developed a more mature CX program.

It's at this point, Land says, leaders have the chance to "truly incorporate" the voice of the customer throughout "every aspect of the organization," not just within a dedicated customer experience team.

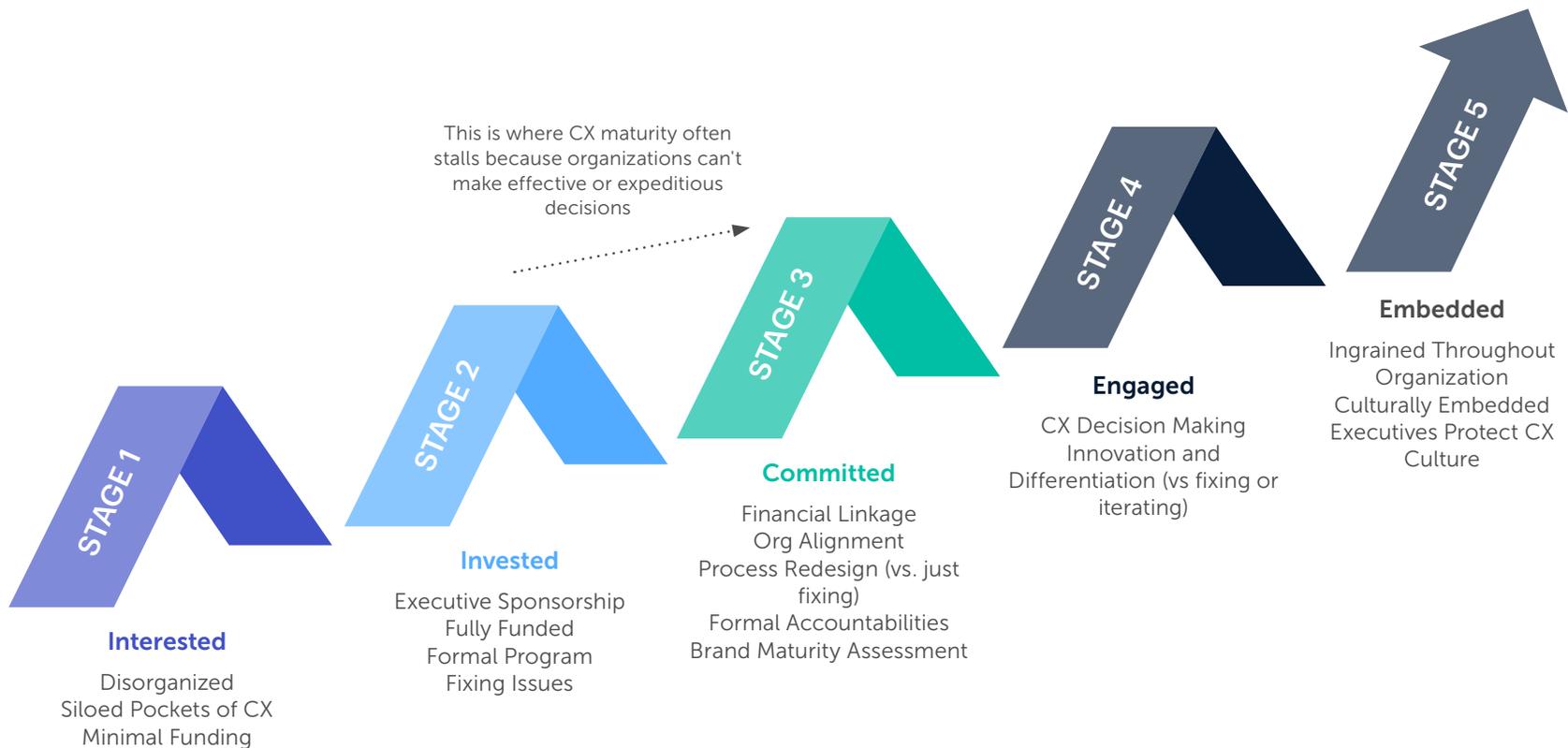
That includes thinking about the customer voice across teams — including quality, finance, and any other area that touches the customer experience.

"At this point, the organizational culture should be ready to support truly having that customer voice at the table to help inform their decisions so you can start seeing experiences change across the entire organization," she adds.

Companies that advance from stage to stage become better positioned to embrace agile best practices. "Organizations at stage 2 may focus on reacting — fixing immediate issues, while those in stage 3 are proactively seeking out insights and applying those in ways to make process improvements," says Hamilton. By stage 4, companies are looking at the bigger picture to uncover true opportunities for differentiation and innovation, based on what customers say they need.

Most companies, however, get stuck between stage 2 and 3 and for a single and simple reason: "They can't make effective decisions," he explains. Enabling effective decision-making processes and assigning accountabilities accordingly is crucial to moving up the ladder of CX maturity.

5 Maturity Stages of Customer Experience



Measuring, Learning, Iterating & Optimizing

Too many brands get caught up in the metrics at first, focusing on KPIs like NPS®. As Hamilton explains, the first 90 days of measurement should focus on:

- Customer engagement: How are customers engaging with customer experience surveys across channels?
- Employee engagement: How is everyone within the organization utilizing the customer experience data you're collecting?
 - Do they have access to insights?
 - Can they see data that's relevant to their role?
 - Do they have the right training and knowledge about how to take action on the insights that they have?
- Getting the full picture: Beyond survey feedback, is your organization collecting other signals as well, to be able to look at the whole picture?

Rest of Year 1: Measure Your Progress

- How are teams utilizing the insights?
- What actions are being taken in response to these customer experience insights?
- What does your closed loop process look like?
- Where is there room to influence the customer experience?

Year 2 & 3: Shift from Reactive to Proactive to Predictive

Throughout this year, your top measurement priorities should be:

- Democratizing access to insights
- Going from being reactive to being proactive
- Pinpointing cohorts and points of friction and building out models to enable proactive outreach
- Measuring and optimizing experiences at the customer cohort level
- Be predictive about what that next best action should be for customers

The #1 Question You Need to Answer?

"Something I got asked at Aaron's was, 'So what?'" says Hamilton. "They'd say, 'You're bringing me all of this incredible data. You're bringing me all these text analytics, and insights, and that's great that we have this feedback from the customer, but so what? What are we going to do with it? What actions are we taking with it? How are we driving ROI? What's the value of taking these actions?'"

I always made it a rule to never walk into a meeting without having answers to these types of questions.

What I used to do is present a quick 'three up, three down' analysis. That is, I shared the three things we were doing well and the three things that weren't going well, along with the financial impacts of getting things right."

Ready to Launch Your CX Program?

We're here to help you unleash your organization's full customer experience potential. Our team of in-house customer experience experts is made up of leading professionals with deep real-world expertise within their respective industries.

International Data Corporation (IDC), the premier global provider of market intelligence, advisory services, and events for the information technology, telecommunications, and consumer technology markets, has found that Medallia delivers exceptional impact for customer experience teams,² including:

- **732%** 3-year ROI
- **\$27.39M** in annual benefits per organization
- **\$150.2M** higher total annual revenue
- **21%** increase in customer satisfaction
- **90%** higher productivity among core CX and power users

[Meet with a Medallia Expert →](#)

² <https://www.medallia.com/resource/medallia-significant-value/>

About Medallia

Medallia is the pioneer and market leader in Experience Management. Medallia's award-winning SaaS platform, the Medallia Experience Cloud, leads the market in the understanding and management of experience for customers, employees and citizens. Medallia captures experience signals created on daily journeys in person, digital and IoT interactions and applies proprietary AI technology to reveal personalized and predictive insights that can drive action with tremendous business results. Using Medallia Experience Cloud, customers can reduce churn, turn detractors into promoters and buyers and create in-the-moment cross-sell and up-sell opportunities, providing clear and potent returns on investment. www.medallia.com

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