

Mastering Digital Engagement in the Moment

Combine direct feedback with experience analytics to understand, react to, and improve the online customer experience

A man with a beard and short dark hair, wearing a black hoodie over a white t-shirt, is sitting on a grey couch. He is smiling and looking at a silver laptop in front of him, with his hands on the keyboard. The background is a soft-focus indoor setting with a modern lamp and some greenery.

Medallia



75% of customers who report using digital channels for the first time say they plan to keep doing so even after things return to normal

Introduction

Digital is fast becoming the default for almost everything customers do. Sparked by the global pandemic, over half of customer interactions took place online.¹ On top of that, 75% of customers who report using digital channels for the first time say they plan to keep doing so even after things return to normal.² Whether it's ordering takeout, shopping for a new summer wardrobe, checking into a hotel, applying for a mortgage, scheduling a healthcare appointment, or just about anything else, digital interactions have become second nature for most people.

As customers gravitate toward the convenience of digital experiences, expectations around every engagement simultaneously rise. But just how high are these standards? Three out of four consumers expect a consistent experience wherever they engage (e.g., website, social media, mobile, in-person), while 54% of customers think companies need to fundamentally transform how they engage.³ Generic cookie-cutter attempts at engagement are no longer enough.

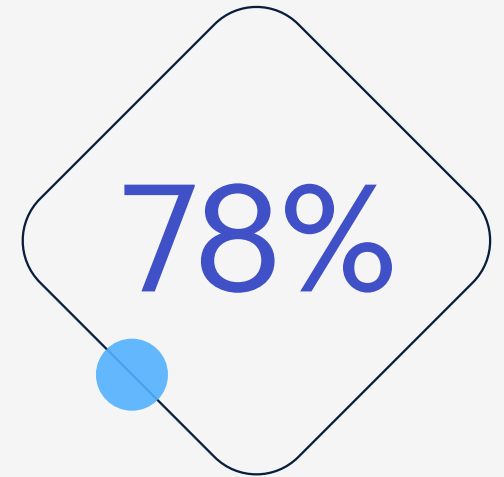
Customers expect real-time engagements that are personal and feel human across every experience — from timely customer support outreach to interest-based product offers.

Delivering the ultimate digital experience is not only built on engaging customers in key moments throughout their online journey, but perfecting how you engage in those moments. To stand out from competitors and bring experiences to life, you'll need to embrace real-time engagement across every channel customers interact with you.

Engage with your customers in all the moments that matter

Where do customers want to be engaged? The answer is everywhere. In fact, 78% of customers prefer omnichannel engagement,⁴ which generates 89% customer retention as compared to just 33% for companies lacking it.⁵ However, there needs to be nuance behind every engagement.

To properly engage customers in the moment, you need to engage them in the right way, at the right time, and the right place. In other words, engagements should be personalized throughout the online customer journey to create a more human experience. And 4 in every 5 consumers⁶ indicate they're more likely to do business with a company if it creates personalized experiences. In order to make this a reality, you'll need to master how you engage, when you engage, and where you engage with your customers.



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7 ways to engage customers across channels



Start conversations with SMS.

Messaging offers a personal way to directly engage with customers on a more immediate level — like texting with a friend. SMS channels offer a variety of ways to engage customers with surveys, customer service updates, appointment reminders, and exclusive marketing promotions. These can be automated, but artificial intelligence can help identify the times to escalate and then alert the right employee for a more personal response when needed.



Collect digital feedback on websites and apps.

Acting as virtual storefronts, websites and apps host the widest range of journeys and experiences. By setting up digital feedback loops — similar to retail staff checking on customers as they shop in-store — brands can discover where friction and bottlenecks arise in real time so they can address it instantly.



Be anywhere with device and IoT connectivity.

With customers tapped into multiple devices — like wearables, voice assistants, and smartphones — there's more opportunities to engage them in the moment. IoT capabilities allow brands to reach customers across any internet-connected device, which makes real-time engagement both more extensive and targeted.



Capture indirect feedback with social listening tools.

Between social media and online reviews, feedback goes beyond direct interactions with customers. Social-listening capabilities pinpoint previously uncaptured, indirect engagements as they happen in real time. With a new wave of feedback, brands can uncover emerging experience issues, new suggestions, and at-risk customers in order to react in the moment.



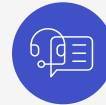
Send surveys to gather direct feedback.

Keeping you in close contact with customers, surveys are perfect for gauging feelings and opinions in real time across any channel. Automated surveys in crucial moments allow you to capture the most insightful feedback right after an interaction like using a chatbot support or an abandoned purchase.



Use video to create virtual focus groups.

Going beyond text, video captures feedback in the moment and can add context through tone of voice, facial expressions, and body language on top of verbal responses. Automatically interpreting sentiment and emotion, video feedback can create a more intimate way to engage with customers in real time, like a virtual focus group, and in a way that can be more convenient for customers.



Use speech analytics to improve contact center interactions.

As one of the most common ways customers engage with brands, especially in the wake of the pandemic, the contact center can't be overlooked. With speech analytics, you can track call patterns, volume, and issues with automated feedback and high accuracy transcripts — all ideal for improving caller experience. Speech insights enable contact center agents to engage better in the moment, while also shedding light on recurring issues across other channels like your website that could be resolved to reduce future calls and improve the omnichannel experience.

When and where to engage with customers online

There's a time and a place for everything, and engaging customers is no exception. While you have an arsenal of ways to engage with customers in the moment, these interactions lose value if you reach out for feedback in the wrong moment. To capitalize on these methods so they enhance digital experiences, you need to determine the right time and place in the online customer journey to use them.

When customers research products and services, engage them with:

- Personalized ads across social media, websites, and apps
- Incentives to enroll in email or SMS mailing lists
- Invitations to join exclusive groups and communities
- Quick pulse surveys to ensure customers find what they want
- On-site and in-app content suggestions to blogs and videos



When customers buy products and services, engage them with:

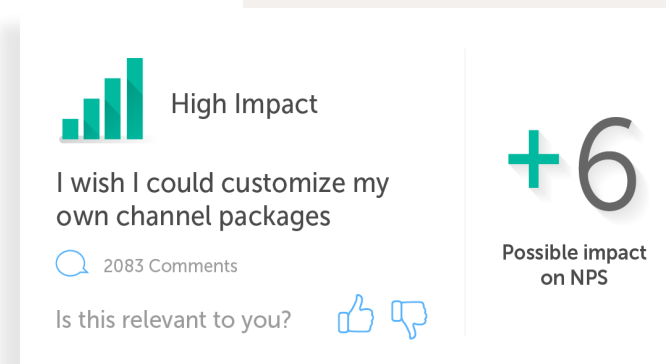
- On-site or in-app product or service add-on suggestions
- Marketing promotions across IoT devices and SMS
- Discount offers in response to social posts and reviews
- Timely pulse surveys to check in during buying experiences
- Follow-up SMS reminders after cart abandonment
- Offer voice assistant shopping capabilities through IoT devices

When customers use products and services, engage them with:

- Offers to exclusive deals, rewards programs, and customer communities
- Personalized homepages and messaging on-site and in-app
- Product, service, and account updates via IoT notifications and SMS
- Responses to at-risk customers posting on social media and reviews
- Product or service feedback surveys across SMS, IoT, along with web and app
- Invites to offer video feedback and reviews around products or services

When customers seek support with products and services, engage them with:

- Automated on-site and in-app customer service chatbot or SMS support
- Self-service content suggestions on-site and in-app
- Proactive customer support outreach calls and SMS messages
- Customer support ticket updates through IoT notifications and SMS
- Responsive customer support accounts on social media
- Invites to provide customer support feedback with video
- Customer support feedback surveys across SMS, IoT, plus web and app
- Poor customer experience forgiveness incentives and promotions



Mr. Smith, I hope you've enjoyed your stay. Check out is in one hour but I can extend that until 3 this afternoon for only \$39 since you're a Diamond member of our rewards program.

19m

JS Wow, that would be great. Let's do it.

1m

No problem, you're all set. Let us know if you need anything else.

1m

Reply To: (858) 356-5866 Internal Note

Type Message...

Close Reply + Close Reply



Prioritize real-time digital engagement across websites and apps

While real-time engagement hinges on connecting with customers in the right way, at the right time, and in the right place, there's more to it than that.

As your website or app welcomes more and more customers every day, these digital destinations can host millions to billions of user sessions that require real-time engagement. And as websites and apps continue to become the "face" of the brand, the interactions across those digital experiences must feel human, personal, and effortless, just as they do in-person.

To enhance real-time engagements on websites and apps that build stronger connections with customers, brands must tailor every touchpoint around customer behaviors, interests, preferences, histories, and journeys. To do this well, organizations need both quantitative and qualitative data to drive meaningful insights into the digital experience.



Measure the success of real-time engagements with quantitative data

What happens when you engage customers, or when they engage you?

- Does it lead to conversion or abandonment?
- Do highly engaged customers lead to better loyalty?
- Does engagement quality change depending on the point in the online journey?

These are just some of the questions that quantitative data can answer around online engagements. Quantitative data gets straight to the point, showing you the outcomes of all your customers' engagements and experiences on websites and apps.

The most common solutions used to capture this data at scale typically start with web and app analytics like Google Analytics and Adobe Analytics or others alike. From tracking visitors, views, and time on-site/in-app to measuring click/touch engagements, conversions, and abandonment, these solutions keep tabs on virtually every web and app outcome. Then on a more granular level, A/B

testing and personalization tools like Adobe Target or Optimizely can track engagement results in a smaller scale manner. With the power to experiment with content tailored to specific audiences — like personalized homepages or custom SMS messages — you can uncover which personalization tests lead to better engagement outcomes versus those that fall flat.

With the ability to keep track of nearly every engagement, both at scale or in tested samples, brands can learn exactly how real-time engagements fare and when they need to be addressed. Whether you're seeing falling engagements on a new mobile app interface or poor response rates to omnichannel IoT communications, you can quickly catch those trends before they completely derail those digital experiences. However, while web analytics solutions and A/B testing tools clearly illustrate the final outcomes of those real-time engagements, they fall short of revealing why and how those results are happening. To truly master engaging in the moment, you'll need to go beyond quantitative data and turn to qualitative data to find opportunities to optimize engagements.

Analyze and optimize real-time engagements with qualitative data

It's not enough to simply monitor every online interaction and experience, you need to know how and why they happen to truly optimize them. It's a matter of pinpointing why customers engage and convert versus hesitate and abandon. Without those insights, brands are missing opportunities to perfect real-time engagement to build a truly exceptional digital experience — on-site or in-app

While web and app analytics along with A/B testing tools collect must-have quantitative data revealing the “what” around those experiences, those solutions fail to capture the “why” behind them. These data-driven gaps necessitate the need for more customer-centric solutions. Direct digital feedback and digital experience analytics can help capture crucial qualitative insights that tell a more complete story. Each offers sampled and scaled ways to track qualitative insights measuring emotion, behavior, and feedback around every online interaction. They expose opportunities for you to elevate real-time engagements and optimize interactions in a way that feels personal, human, and effortless.

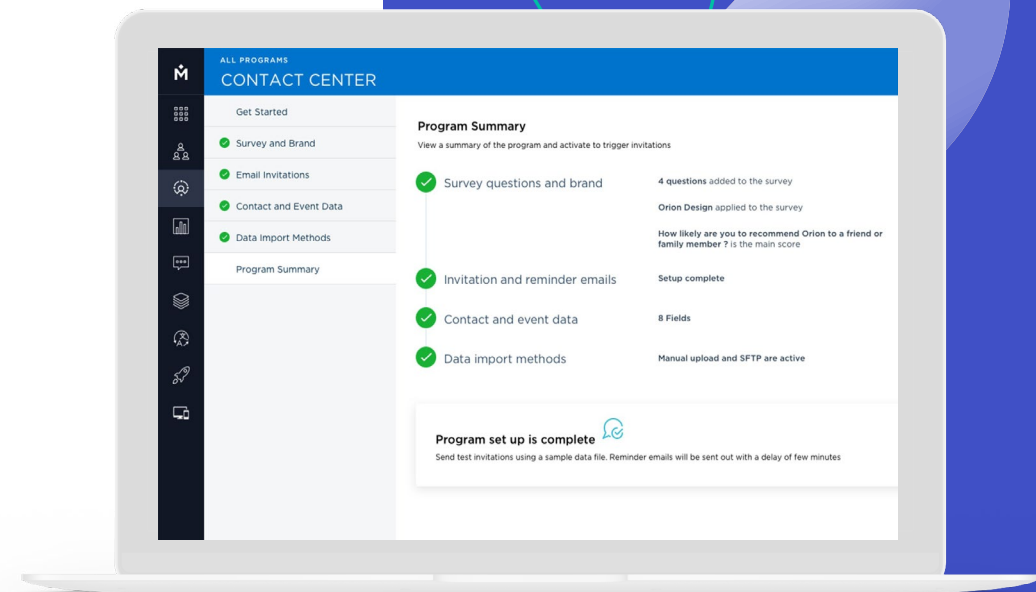
Digital experience feedback solutions capture customer feedback across websites and apps, IoT devices, and omnichannel journeys by capturing customer signals and triggering surveys of all kinds to understand the customer experience in the moment. This feedback generates valuable insights into customers' wants and needs, and helps you better understand the behavioral context for each customer at the moment they provide feedback. Meanwhile, digital experience analytics identify and prioritize the most urgent experience issues impacting conversion, engagement, and loyalty across websites and apps. It tracks every user experience to identify key patterns of behavior so teams can easily prioritize optimization efforts and segment more effectively. While both offer a wide range of tools and capabilities for evaluating experience, there are a few methods you'll find particularly helpful when trying to engage in the moment.

When using **digital experience feedback** to optimize real-time engagements across channels, prioritize the following:

Pulse surveys offer a way to check on customers in key moments and get a “pulse” on their experience while they navigate a website or app. With the ability to set up automated triggers at specific touchpoints — like browsing low stock products or after changing an account setting — you can engage customers and collect feedback about their digital experience. Pulse surveys mimic how store associates check on customers while shopping.

Transactional surveys help gauge customer satisfaction and digital experience quality at the end of an on-site or in-app journey. Whether it’s after a customer converts at online checkout or a customer chats with a frontline agent, these surveys offer a way to understand exactly how customers feel about specific transactions online. These surveys should be used at key digital touchpoints that may noticeably impact a customer’s experience.

Chatbots enable instant customer support by engaging in friction-filled moments or specific areas in the online journey. With automated messaging designed for the most common customer support issues, chatbots provide a scalable way to engage customers when they face poor digital experiences. Sophisticated AI-driven chatbots can escalate tickets to frontline agents to step in and further assist customers with more complicated issues or persisting problems.



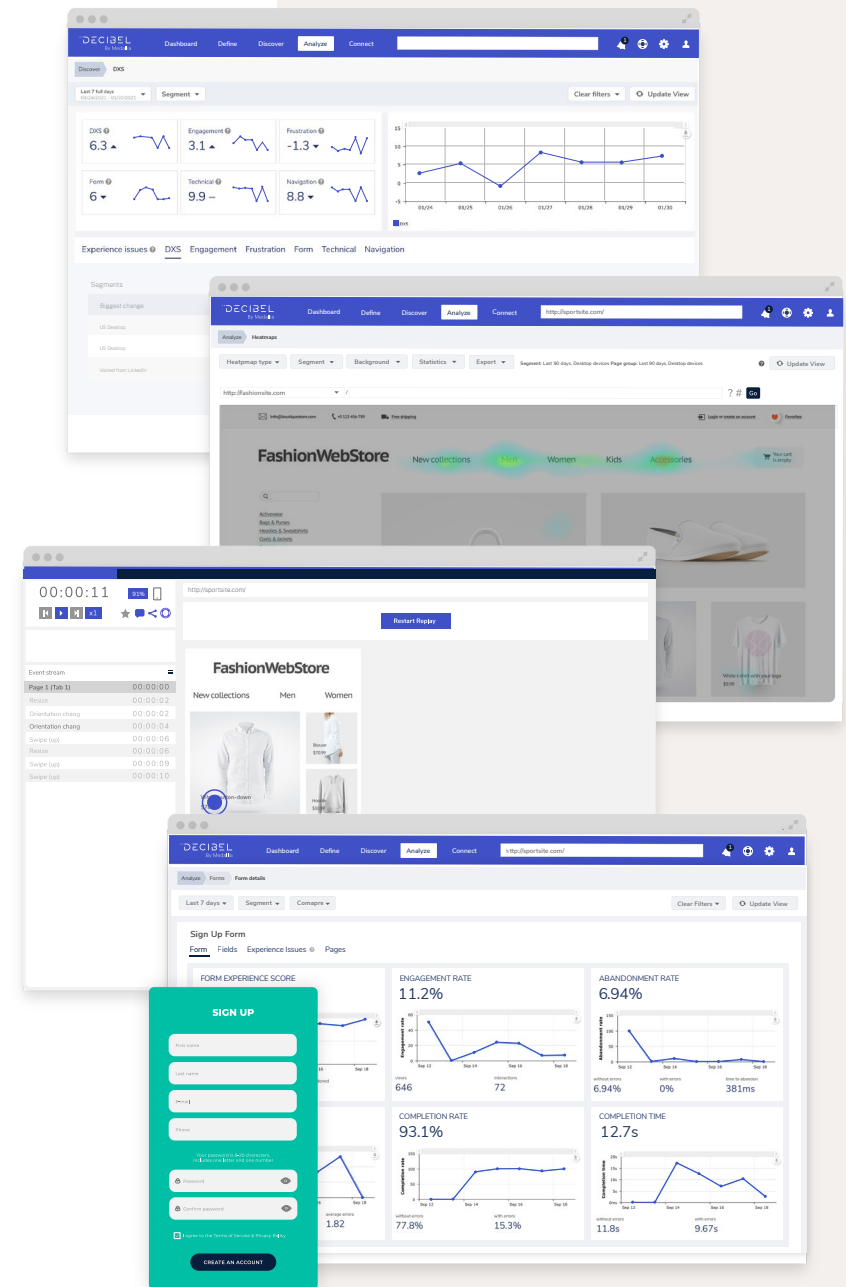
When using **digital experience analytics** to optimize real-time engagements, prioritize the following:

Digital experience scoring with behavior detection measures and quantifies every online customer experience while prioritizing the most urgent issues impacting engagement and conversion. You can pinpoint every instance of frustration, confusion, and interest to uncover where customers stay engaged on-site and in-app versus where friction arises. This empowers you to benchmark experiences on websites and apps, while highlighting areas where fixes, improvements, and feedback are needed.

Heatmaps can display aggregated on-page user behaviors and interactions with colorful visualizations to uncover areas of strong and poor engagement. With several types, such as scroll, attention, dot/click, attribution, and behavior heatmaps, you can determine the various ways interactions unfold and which pages or journeys require attention. This allows you to spot on-page engagement patterns at scale and quickly respond to those customers' experiences.

Session replays provide anonymized recordings of every user session to display exactly how journeys, interactions, and behaviors unfold on a case-by-case level. With session replays automatically identifying the most insightful sessions to watch back, you can investigate and review engagements right after they happen. This creates an "over the shoulder" view of every experience to determine how to respond to issues in the moment at the individual level.

Form analytics track those ever-so important experiences on submission-based pages like sign-up pages, demo or contact forms, checkout screens, and others alike. And these touchpoints act as conversion gateways across websites and apps. With experienced based metrics and field-based dashboards, form analytics are the perfect tool for catching form errors and issues to reduce conversion-killing bottlenecks.



Putting it all together: Real-time engagement in action

Each of these tools and capabilities alone can enable ways to engage in the moment. But by bringing them all together, combining the power of direct feedback with digital experience analytics, brands can engage in the right way, at the right time, and in the right place to make digital experiences feel personal, and human.

Customers today now expect you to engage and understand them in real time across websites and apps. The brands that utilize the right tools and strategies to master engaging in the moment will be able to stay ahead of rising consumer expectations, and the competition. With digital now at the heart of most brands, engaging in the moment across your website and app is the best way to create online relationships that last.

Here's an example of how it could look in action within your organization:



Challenge

A problematic landing page that has a malfunctioning video and unresponsive buttons sparks frustrated behaviors amongst users. With behavior detection automatically alerting instances of erratic mouse movement and rapid multi-clicks, it's clear there's a bottleneck forming. Ultimately, the digital experience score quantifies the experiences within those user sessions and confirms the landing page quality sits below benchmarked levels.



Response

With a declining digital experience score, real time engagements like a pulse survey or chatbot automatically trigger in the moment to gather digital feedback for further context. A pulse survey will ask a few brief questions to capture issues in the voice of the customer, which may help teams investigate and resolve the issue. Meanwhile, a chatbot could provide possible short-term solutions or contact a frontline agent if more in-depth support is needed. At the end of the customer journey, using a transactional survey is useful for learning how well the issue was handled in real time.



Solution

With a clear understanding of the issues at bay, form analytics reveal submission errors worth investigating further. Next up, turn to heatmaps for on-page analysis to spot frustration patterns over the broken buttons and video, then watch back session replays for a look at exactly how those problematic sessions unfold. With all the evidence in-hand, it's a matter of rolling out fixes and improvements, then checking the digital experience score to ensure it rises back to its benchmark.

Medallia Digital Suite

Ready to partner with our team of digital experience experts? They'll help you turn every online engagement, website, and app into a seamless and personalized digital experience that keeps customers coming back.

[Contact Medallia today for a free digital experience consultation](#)

¹ <https://www.mckinsey.com/business-functions/strategy-and-corporate-finance/our-insights/how-covid-19-has-pushed-companies-over-the-technology-tipping-point-and-transformed-business-forever>

² <https://www.mckinsey.com/business-functions/mckinsey-digital/our-insights/the-covid-19-recovery-will-be-digital-a-plan-for-the-first-90-days#>

³ <https://outgrowco.medium.com/customer-engagement-statistics-in-2020-547e41c70c74>

⁴ <https://outgrowco.medium.com/customer-engagement-statistics-in-2020-547e41c70c74>

⁵ <https://blog.zoominfo.com/78-customer-engagement-statistics/>

⁶ <https://www.slideshare.net/EpsilonMktg/the-power-of-me-the-impact-of-personalization-on-marketing-performance/1>

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. Medallia has offices worldwide, including Silicon Valley, Buenos Aires, London, New York, Tel Aviv and McLean, Virginia. Learn more at www.medallia.com.

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