The Reopening Playbook

5 essential ways to use the voice
of customer in your game plan

Medallia

The next era of business is unfolding right now, and both customers and employees are looking forward to a controlled return to physical locations. Yet, 68% of people don't want to rush this process[1]. Failing to meet evolving customer needs could cause a damaging brand moment, or worse, might be the catalyst to a business closing its doors for good. Here are five key experience management practices to help your business reopen successfully:

01   Get ahead of evolving customer expectations

Find out what customers want and need from the next phase

02   Communicate in real time

Embrace all channels to engage and inform customers on their terms, and in the moments that matter

03   Enable fast, effective action

Gather urgent, actionable insights to keep a pulse on customers' evolving needs

04   Maximize insight through non-survey signals

Uncover customer sentiment around safety and comfort

05   Consider compliance from anywhere

Get real-time insights into the hands of employees responsible for compliance

Medallia

01 Get ahead of evolving customer expectations

From heightened awareness of cleanliness to a new appreciation for digital options, some aspects of "quarantine life" will remain long after lockdown is lifted nationwide. Engage customers now to better understand what they will need to feel safe and understood during their next visit.

What are the biggest concerns about returning to brick and mortar? High-risk demographics need to protect themselves diligently[2], but even the average consumer is rethinking who they trust with their health and safety. Worries over an organization's preparedness or gaps in stated policies may be silently deterring them from returning to physical locations. In fact, 77% of consumers report that in the future the amount of in-person interaction required at a business will factor into their decision of whether or not they visit the business.[3] Businesses with access to customer contact information should involve customers in the development of their reopening strategy by asking about expectations and requirements and then openly communicating policies and procedures.

Are improved digital experiences changing the physical location's role? Merely observing web and mobile usage patterns fails to expose how customers feel about services they previously enjoyed in stores. Engaging customers in a direct dialogue about what's working—or what's missing—through digital allows organizations to reimagine what omnichannel experiences will keep customers coming back in the future.

"

Our survey data showed a clear desire for these kits and we have a bias toward action when we see new trends emerge. As more people begin to consider travelling in the months ahead, ensuring their safety at all steps of their journey remains our top priority.

Bill Lentsch,
Chief Customer Experience Officer, Delta Airlines[4]
As shared in Business Traveller

Going from guessing,
to knowing:

A Medallia customer in public transit seeks to understand how passengers' expectations and requirements will likely change once social distancing guidelines are lifted. Leveraging ad hoc survey capabilities along with Medallia Text Analytics and Digital, they are quickly finding what matters to their riders in the coming months.

Tools to get started:

AskNow deploys new questions for ongoing surveys at a moment's notice and collects responses in real time.

Insights Suite gathers consumer opinions, motivations, and feelings through video research and crowdsourced ideas.

Medallia

02 Communicate in real time

Not only should organizations think through the depth and sincerity of their messages, but also the frequency and purpose, with special regard to tech touch vs. human touch. Embracing the appropriate channel to engage and inform on the customer's terms is a huge differentiator.

Make information accessible when and where customers need it. Locations are not just reopening, they're reorienting to new business hours, corporate policies, sanitation procedures, and touchless payment options—all of which customers may want to understand in advance of their visit.

Sending a detailed policy update email is a good start, as 56% of consumers are interested in brands' COVID-19 initiatives[5] and 79% of consumers say that going forward they will seek out information on the type of health and safety standards and processes businesses have in place before visiting them.[3] But, during reopening, customers need digestible, contextually relevant information throughout a business's digital properties. Intercepting users on critical pages like the store locator serves the dual purpose of providing information while also enabling the customer to provide direct feedback on the digital experience.

Automate touchless interactions and collect more relevant feedback with SMS. Scheduling curbside pick-ups, organizing orders chronologically, and distributing traffic evenly throughout the day can enable faster fulfillment and shorter wait times. Adding two-way SMS communication can ensure customers have instructions and employees have a way to identify customer vehicles.

For service-based interactions such as phone or hardware repairs, tax preparation, or loan applications, text is an effective way to send reminders or advise what documentation or information customers should come prepared with in order to reduce direct interaction time.

Mobile messaging also provides an additional opportunity to inform customers of policy and procedure updates prior to a visit or to re-engage post-visit when feedback is at its most useful and accurate.

87% of consumers say they think brands should continue to offer options for things like curbside pickup that limit the need for in-person visits.[3]
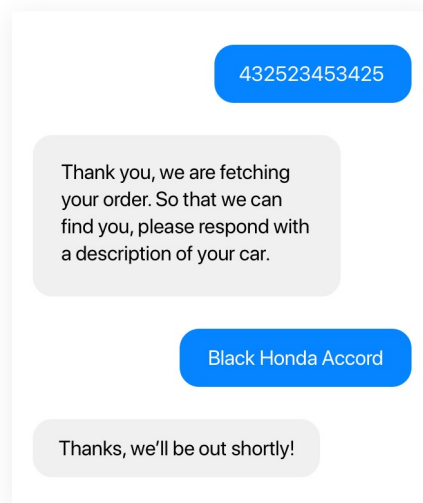
Making curbside happen with SMS

At Beyond Bagels & Deli in Long Island, owner Dr. Robert Kleinwaks launched a curbside pickup option that has helped keep his business afloat during the global pandemic. He proactively reached out to his customer base to remind them that he was still open and to share the additional steps his staff was taking to provide a safe and healthy service.[6]

Tools to get started:

> **Medallia Digital** collects real-time customer feedback across digital channels including web, mobile, and in-app.

> **Medallia Zingle** delivers in-the-moment, personalized experiences and empowers frontline employees to respond quickly via two-way mobile messaging.

432523453425

Thank you, we are fetching your order. So that we can find you, please respond with a description of your car.

Black Honda Accord

Thanks, we'll be out shortly!

Medallia

"
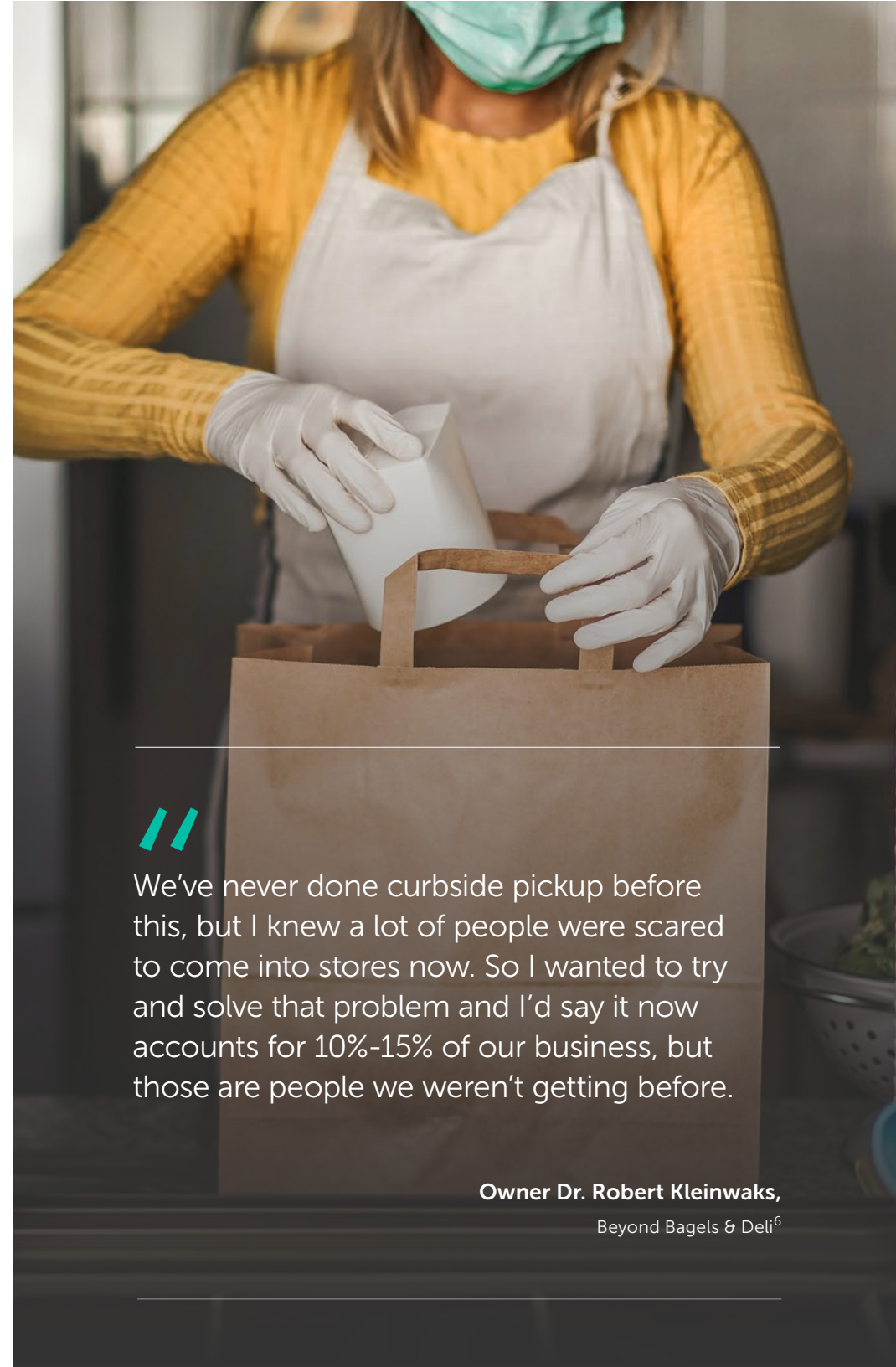
We've never done curbside pickup before this, but I knew a lot of people were scared to come into stores now. So I wanted to try and solve that problem and I'd say it now accounts for 10%-15% of our business, but those are people we weren't getting before.

Owner Dr. Robert Kleinwaks,
Beyond Bagels & Deli[6]

03 Enable fast, effective action

The most difficult part of soliciting feedback is often deciding what not to include in a survey. Opting for short, open-ended, and multimodal surveys increases response rate to facilitate a continuous stream of timely and relevant insights.

Pulsing customers and employees. Regularly asking topically relevant questions enables teams to understand the changing sentiment of their customers—even if they aren't rushing back when the doors open. Leaders should also keep in mind that being thrust back into work environments which require close proximity to colleagues and customers could be an anxiety-inducing situation. So to help frontline teams focus on taking care of customers, organizations should establish an on-going dialogue with employees to understand what they need to feel safe, comfortable, and productive.

Engaging customers post-visit. Triggering post-visit surveys with questions tailored to the type of in-store interaction (e.g. service, purchase, pickup, return, dining) drives more responses and gathers the most relevant information. It's a win-win: employees receive timely details in order to effectively close the loop when necessary, and the survey architecture is easily updated to keep pace with changing concerns.

53% of consumers state that their experience could have been improved if they had the opportunity to give real-time feedback and the company took immediate action.
Medallia, Real Time is the Right Time[7]

Using AI to improve safety

A global financial services company used Medallia's COVID-19 Text Analytics topic set to surface customer concerns around employee hygiene, sanitizer in branch locations, and handling cash. The company continues to monitor customer sentiment and make operational adjustments in response.

Get started with no IT required solutions:

Medallia's quickstart packages help you get in-depth answers to burning questions quickly with simple two to three-question surveys with Text Analytics and optional video capture and analysis.

Quickstart Fulfillment to iterate on fulfillment process changes faster by seeing customer examples of where breakdowns occur.

Quickstart Customer Micropulse to better prepare for the future by engaging targeted customer segments about their evolving needs.

Quickstart Employee Micropulse to gather ongoing insight into employee perceptions, obstacles, and ideas.

Medallia

04 Maximize insight through non-survey signals

In this fast-changing environment, it's more critical than ever to take advantage of customer signals from existing open-text, speech, or video interactions to help uncover customer sentiments around safety and comfort at scale. These signals can act as early warnings even before issues are discovered through traditional surveys.

Get critical insights from the contact center. Case volume is booming: average weekly tickets are up 24% from 2019[8] as customers are more likely to reach out to share observations from recent visits when public health and safety are on the line. Extracting, transcribing, and analyzing unstructured data from calls, chats, emails, and cases can be key to quickly uncovering issues with logistics, cleanliness, touchless options, or employee soft skills.

Protect your brand's reputation with social listening. Expect existing and prospective customers to put more stock in reviews on aggregation sites and social media outlets during the early phases of reopening. Negative reviews citing a lack of proper sanitation, resourcing, or procedures could deter even the most loyal customers from visiting physical locations, especially if the reviews or comments are left unanswered. With the right listening and alerting technology, employees can respond to customer issues and companies can better understand how a location stacks up to nearby competitors.

47% avoided a company because of its online reputation or negative social reviews.
Medallia, The Customer Experience Tipping Point[9]

To see the whole picture and act swiftly, it's critical now more than ever, for brands to have a comprehensive view of customer needs beyond what surveys offer.

Medallia Speech reveals powerful insights from voice interactions with speech-to-text processing and AI-powered acoustic emotional analysis.

Text Analytics turns every word into insight and action by leveraging AI and machine learning to unlock the rich potential of unstructured data.

Medallia Social allows you to take charge of your online reputation and benchmark your business against the competition with social listening.
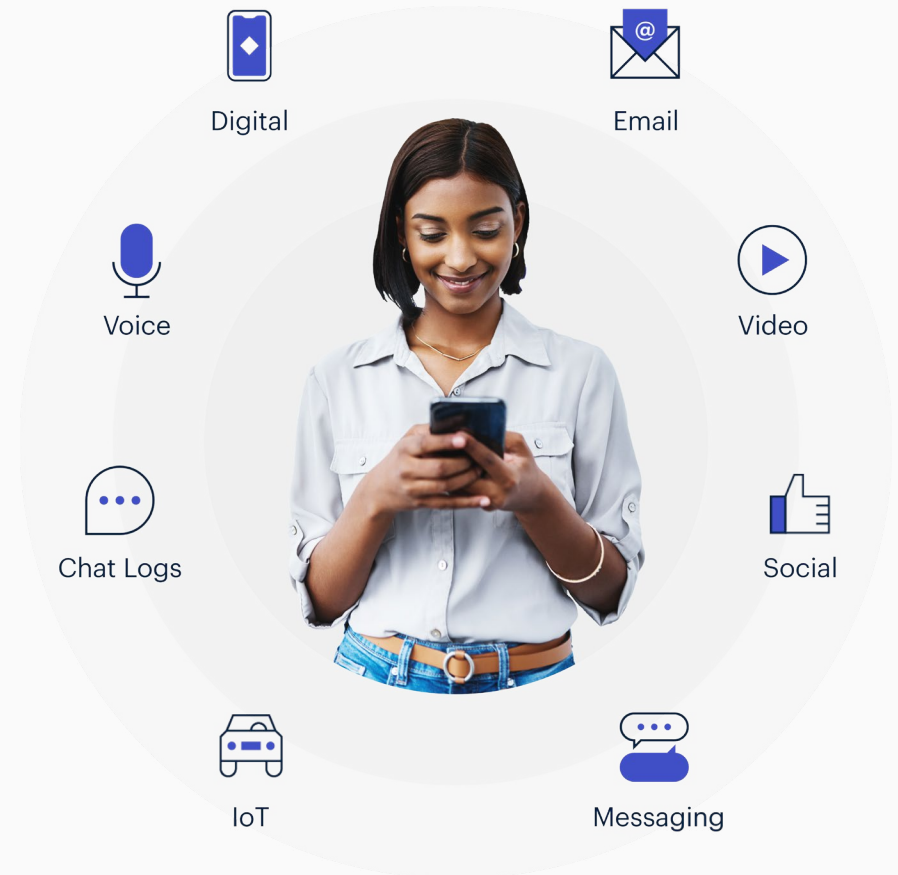
"

When people indicate their loyalty...there's a series of signals out there that, with big data analytics tools, we can capture, organize, and keep track of.

Fred Reichheld,
Creator of the Net Promoter System[10]

Get a bigger picture of your reopening with signals:

Digital

Email

Voice

Video

Chat Logs

Social

IoT

Messaging

Medallia

05 Consider compliance from anywhere

County to county, safety regulations and at-home orders are changing daily, and strict observance of policies for each phase of reopening[11] is of the utmost importance. In some places this may include symptom checking, limits on the number of patrons allowed inside at once, or enforcing the use of masks. But it can also mean thinking through procedures that require reaching out to customers or employees quickly.

Establishing strong direct and indirect customer feedback loops early ensures that real-time insights get into the hands of those responsible so they can take immediate action. Mobile and desktop alerts, along with robust role-based dashboards enable employees to see individual feedback with full context through case management activities. With the information they need at their fingertips, retail operations managers, CX teams, and executive leadership can take action in the moment, even when they are on site.

"

Associates in every location have the information they need at their fingertips, 24/7, in an easy-to-use app. That empowers them to take action to solve member problems, and we're seeing member satisfaction scores rise as a result.

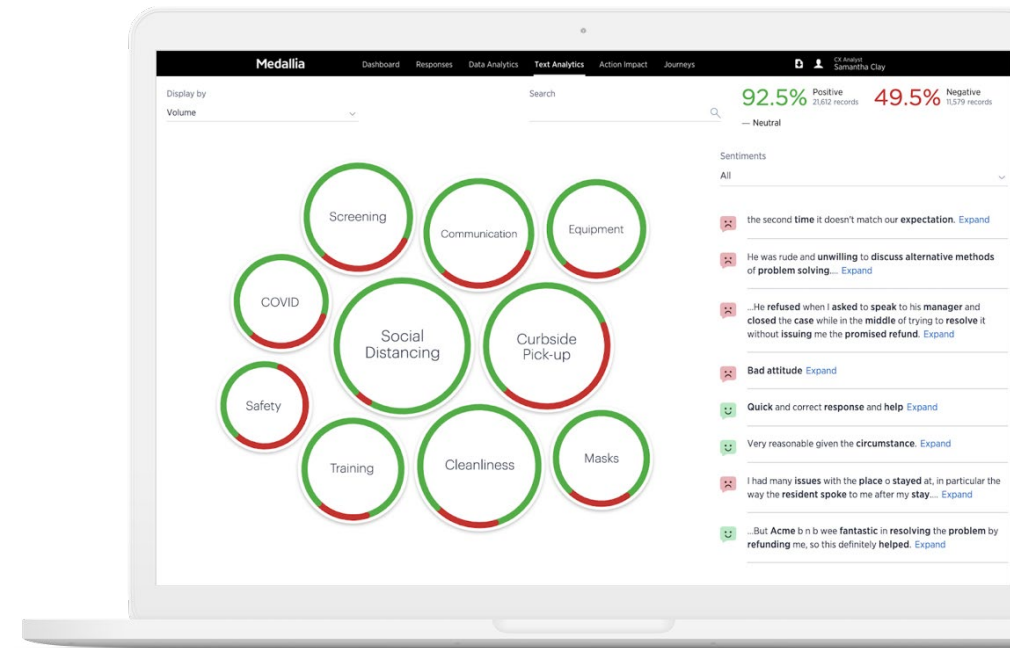**Tracey Brown**
Chief Experience Officer, SAM'S Club[12]

Tools to get started:

Medallia Mobile puts personalized dashboards, alerts, and workflows in the palm of every employee's hand.

Medallia

CONCLUSION

Attentiveness and responsiveness to help make reopening a success.

Ultimately, in-person interactions are central to peoples' sense of belonging and community. But keeping customer-to-employee or customer-to-customer interactions safe is critical, and presents great risks and opportunities for a brand. Getting ahead of evolving expectations, communicating purposefully and in real-time, taking swift action, maximizing insight with non-survey signals, and keeping a close watch on compliance can help ensure that the reopening of any business goes smoothly and drives long-term brand loyalty.

[1] https://www.pewresearch.org/fact-tank/2020/05/07/americans-remain-concerned-that-states-will-lift restrictions-too-quickly-but-partisan-differences-widen/

[2] https://www.cdc.gov/coronavirus/2019-ncov/need-extra-precautions/what-you-can-do.html

[3] https://info.zingle.me/2020-consumer-report-direct-link-text-messaging-covid19-future-of-commerce customer-experience-0

[4] https://www.businesstraveller.com/business-travel/2020/05/25/delta-to-provide-passengers-with-hygiene-kits/

[5] https://www.marketingdive.com/news/4as-56-of-consumers-interested-in-brands-covid-19-initiatives/574728/

[6] https://www.zingle.com/blog-text-thru-is-the-new-drive-thru-as-curbside-commerce-takes-off/

[7] https://go.medallia.com/rs/669-VLQ-276/images/Medallia-Real-Time-Engagement-Infographic.pdf

[8] https://www.zendesk.com/blog/zendesks-benchmark-snapshot-impact-covid-19-cx/

[9] https://go.medallia.com/rs/669-VLQ-276/images/Medallia_Ipsos_The_Customer_Experience_Tipping_Point.pdf

[10] https://gateway.on24.com/wcc/gateway/elitemedallia/2285827

[11] https://www.whitehouse.gov/openingamerica/

[12] https://www.medallia.com/platform/mobile/

Follow us: in medallia   blog.medallia.com   @Medallia