



Medallia

# Small Changes, Big Impact

A 120-Day Plan for Digital Experience Success

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# Medallia

## DIGITAL SUITE

Delivering intuitive, engaging, and personalized online experiences—at scale

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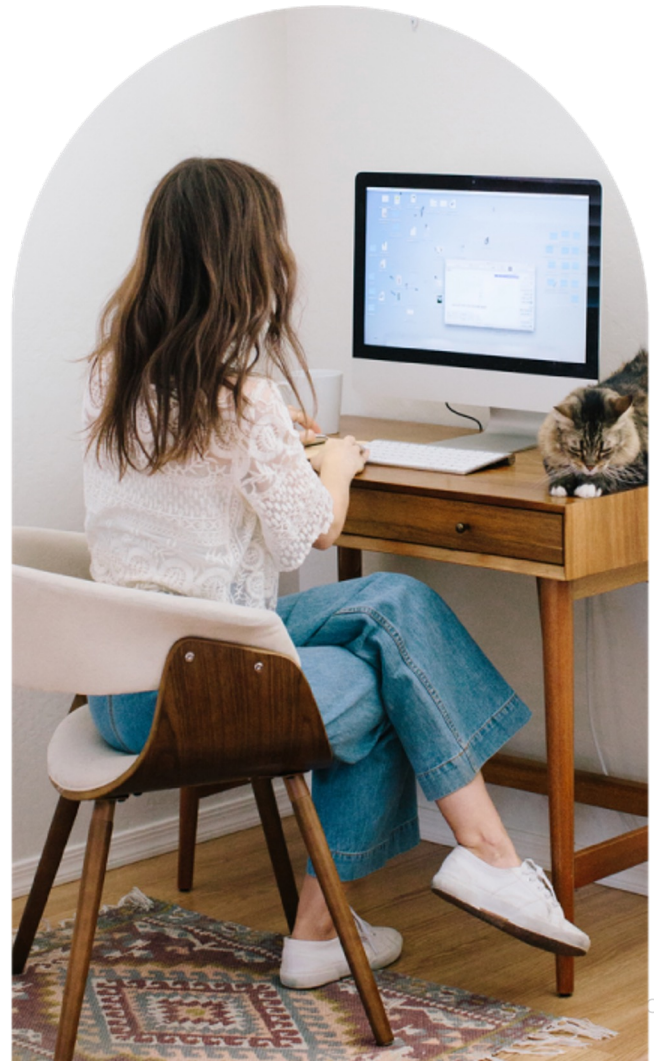


# I've launched a program. How do I start seeing wins?

How is your team **transforming insights into actions** that add value?

How are you justifying your budget, and **showcasing your ROI**?

How are you building a program that enables you to **keep succeeding, over time**?



Confidential.

# A 120-Day Plan for Success

Realize more ROI from your digital efforts

**30 / 60 Days**  
Align on Business Goals & Build a Program

**90 Days**  
Uncovering, and acting on, low-hanging fruit

**120 Days**  
Telling Your Story Across the Org & Showcasing ROI

# A 120-Day Plan for Success

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- **30 / 60 Days: Align on Business Goals & Build a Program**

**Align on Business Goals & a Metric**

Decide what will bring value to the organization.

**Design a Program Around Your Metric**

Hyper-focus on building a program that will power success.

- **90 Days: Uncovering, and acting on, low-hanging fruit**

**Examine Aggregate Level Trends**

Focus on actions that will create the biggest impact for the largest number of people.

**Don't Be Afraid to Think Small**

Sometimes the biggest problem for your end-user is the easiest thing for you to fix.

- **120 Days: Telling Your Story Across the Org & Showcasing ROI**

**Explain Your Thought Process**

What were you trying to accomplish with your metric?

**Prove the Value of CX**

Don't only show them your quick win - prove this is a repeatable process that can become standard when you invest in CX.

# Common Business Goals for Digital Programs



## Build the Digital Foundation

Create a strong, customer-centric digital presence



## Increase Sales & Revenue

Successfully engage and capture more customers online



## Reduce Operational Costs

Cut costs, increase productivity, and improve experiences







## Increase Customer Loyalty

Deliver digital experiences that keep customers coming back



# Connecting Business Goals & CX Program Metrics

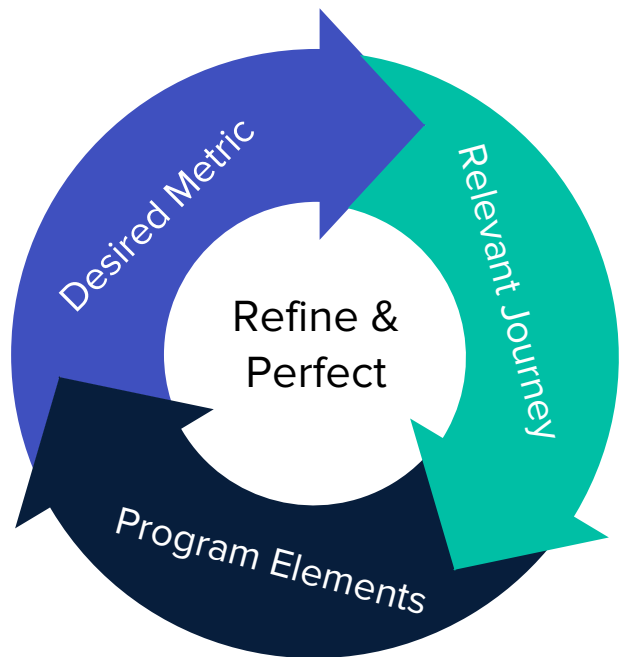
Business Objective	Associated Metrics
 Build the Digital Foundation	<ul style="list-style-type: none"><li>● Increase click-through-rate</li><li>● Improve campaign performance</li><li>● Increase time on site / pages visited</li></ul>
 Improve Customer Loyalty	<ul style="list-style-type: none"><li>● Improve Net Promoter Score (NPS)</li><li>● Lower Customer Effort Score (CES)</li><li>● Improve task completion rate</li><li>● Increase time on site / pages visited</li></ul>
 Increase Sales & Revenue	<ul style="list-style-type: none"><li>● Increase conversion rate</li><li>● Lower shopping cart abandonments</li><li>● Increase average order value</li></ul>
 Reduce Operational Costs	<ul style="list-style-type: none"><li>● Increase self-service with customers on websites/apps</li><li>● Reduce call center costs / call deflection</li><li>● Increase task completion rate</li></ul>

**Pro Tip: Your program can be successful without relying on typical CX metrics like NPS or OSAT.**



# Increase Sales & Revenue

Example: Mortgage Application Process



## **Metric:** # of Task Completions / CES

Measure current # of task completions and value for mortgage application  
Measure how much effort it takes customers to complete the entire task

## **Journey:** Successful vs. Unsuccessful Sign Ups

Map out most common journey flows that relate to mortgage application  
Find journey differences between successful vs. unsuccessful task completions

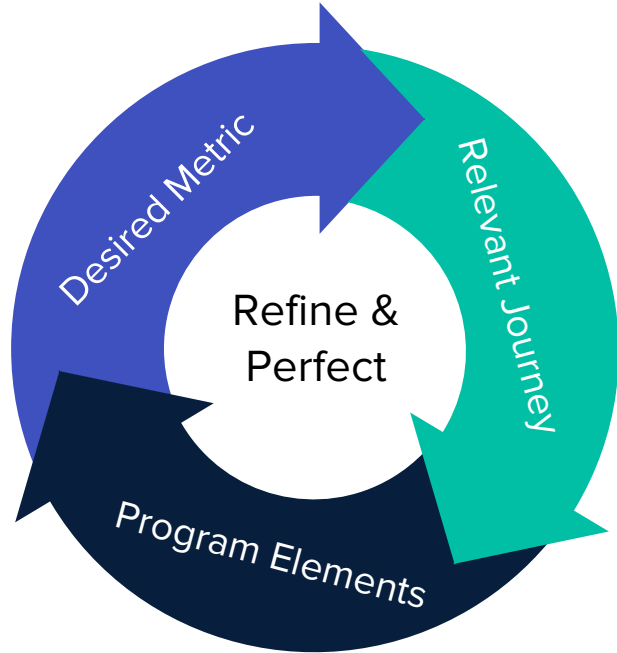
## **Program Elements:** Design Your Program for Scale

Place abandonment surveys on key steps of the mortgage application journey  
Connect feedback data with session replays & heatmaps for the customer's POV

Pro Tip: Starting with strong building blocks for your program is key to creating a continuous, low-effort cycle of experience management.

# Increase Customer Loyalty

Example: Increase App Engagement



## **Metric:** Member Sign-Ups / Time Spent on App

Measure Member Sign Ups, application downloads, and feedback volume  
Measure how much time / how engaged customers are using app

## **Journey:** What Drives the Most Interest

Identify most common journey flows that loyal customers gravitate towards  
Deep dive into what types of content / material is driving member engagement

## **Program Elements:** Replicating Success at Scale

Place content effectiveness surveys on journeys with most traffic to see what's working  
Connect feedback data with session replays & heatmaps for the customer's POV

Pro Tip: Once you know what drives engagement, leverage it across channels for farther-reaching success.

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# How to find low-hanging fruit consistently

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## Aggregate-Level Trends

What bothers one customer is not as important as what bothers 300. Prioritize aggregate-level analysis for impactful insights.



## What's Impacting Your Bottom Line

Proving the monetary value of CX is key. When you don't have hard numbers (like average order value), make estimates.



## Activate Other Teams

Solving problems requires collaboration. Foster a working relationship with other teams to see timely results.



# Healthcare Example: Reduce Operational Costs

Goal: increase digital self-service/adoption to reduce contact center volumes

## Program Design

- Launched abandonment surveys on self-service journeys - *e.g., login, pay a bill*
- Paired survey responses with session replays & heatmaps
- Role-specific alerts for spikes in feedback/drops in scores on self-service journeys

## Low-Hanging Fruit

- Digital team alerted to spike in feedback on login journey
- Text Analytics reveals “login” as the #1 negative emerging trend
- Session replays show website header is blocking login button

## Activate the Org

- Shared findings with web development and product teams
- Fix went out in under 1 hour, preventing any further login issues

# Automotive Example: Build the Digital Foundation

Goal: replatform website to make it easier for customers to navigate/convert

## Program Design

- Launched abandonment surveys on key conversion journey
- Role-specific alerts for spikes in feedback/drops in scores on self-service journeys
- Integrated cart-value signal data into experience management platform

## Low-Hanging Fruit

- Alert emails triggered to Product, Marketing, and Insights team that users were unable to make any purchases from ecommerce website
- Financial impact was analyzed in real-time, revealing +\$100,000 in lost revenue

## Activate the Org

- Root cause quickly identified after alert went to Product / Tech teams
- Resolved the bug within 48-hours, which resulted in conversion resuming their normal rate

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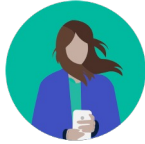
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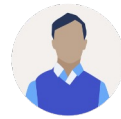
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# Key stakeholders and how to talk to them



Head of Contact Center



Head of Product



Head of Finance

	Head of Contact Center	Head of Product	Head of Finance
I care about...	Identifying reasons for calls into the contact center  Improving agent performance	Creating digital products that are intuitive and easy to use  Increasing adoption and repeat usage of products	Reduction of operational costs across channels  Optimization of resources and investments
What will win me over...	Giving me direct visibility into why certain cohorts are calling in  Helping me engage other stakeholders	Showing me how customers are perceiving my product today  Concrete, customer-driven suggestions for my roadmap	Reduce cost to serve across the customer base, e.g., call drivers  Showing how CX helps the business grow
Pro Tip	Talk about the specific impact to call drivers	Show how customer feedback can validate features	Speak their language and quantify everything

# Key Takeaways

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Focus on the journeys that matter.

Make sure that you're focusing on a journey relevant to your business goal/metric, and that you're thinking in terms of revenue.

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Don't be afraid to think small.

The simplest problems are often those that can cause the most chaos for your customers and your bottom line.

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Get other stakeholder buy-in.

Making the impact you want often requires collaboration with other groups, like Product and Dev.

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Thank you