Spring '20 Product Release Webinar

Mar. 10, 2020

Medallia

Safe Harbor

This presentation may contain statements regarding our plans and expectations for the development of new or existing products, features, services, technologies and solutions. We have based these statements largely on our current expectations and assumptions and on information available as of the date of this presentation. However, these statements are subject to known and unknown risks, uncertainties and other factors that may cause the actual development of new or existing products, features, services, technologies and solutions to be materially different from the plans and expectations set forth in this presentation. In particular, the feature sets and delivery dates set forth in this presentation are based on various assumptions and estimates and subject to change.

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Continuous Innovation in 2019

Summer '19	Fall '19	Winter '19
Action Intelligence	CX Journeys	CX Profiles
Conversations support for WeChat & WhatsApp	Conversations message connector API	Social rival management
myMedallia Mobile	Digital In-App app rating engagement	Medallia Voices configurable card selection
Medallia for ServiceNow	Field-level data encryption	Medallia Sales & Service Experience for Salesforce
Tableau connector		Medallia for Adobe Exp. Cloud

+ ongoing improvements to Text Analytics, data visualizations, program management...

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Spring '20: Accelerating Impact from **Signals to Action**

Capture Every Signal

Increase engagement with feedback programs and improve ability to listen to customers through indirect channels.

Analyze & Predict

Provide targeted insights on where to focus attention and prioritize CX improvements.

Empower Action

Provide frontline employees tools to take action on CX insights.

Self-Service Program Management

Easily and confidently manage continually evolving experience programs.

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Capture Every Signal

Improve your ability to engage and listen to customers and employees.

- **Conversations**
  - Slack connector
  - Web-based conversations
- **Digital In-App**
  - Custom notification banner
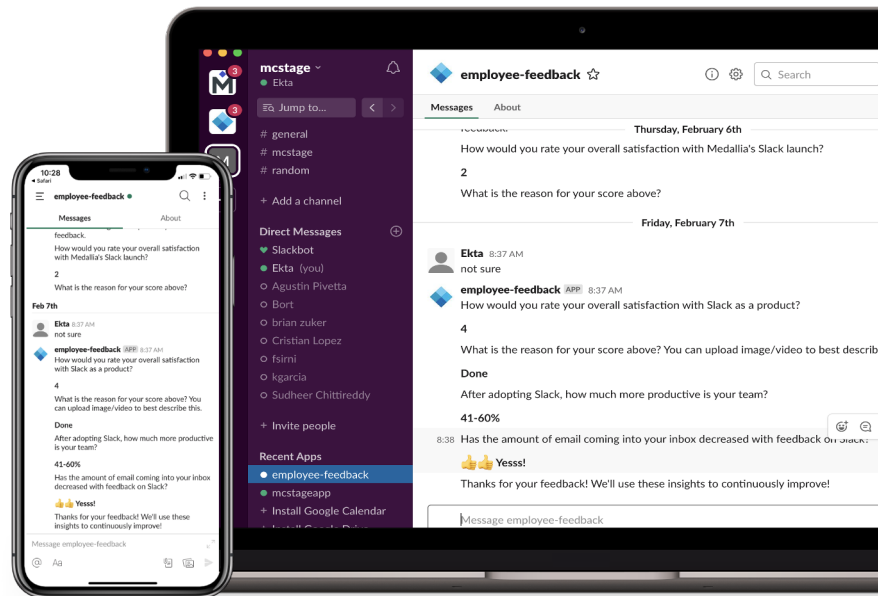- **Social (new sources)**
  - Healthgrades
  - CarGurus

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Enhance your employee experience with Conversations via Slack

- Use Conversations via slack to get in-the-moment feedback from employees.

- Drive higher response rates meeting employees where they are.

- Allow employees to add photos and videos to give additional context about their experience.

Employee Experience Use Cases

IT

Close a helpdesk ticket or quarterly IT survey

Frontline Managers

After onboarding new employees

Corporate Programs

Post launch of a new program (e.g meals, gym, etc)

Sales
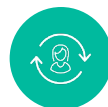
After an employee closed/lost a deal with a customer/prospect

Learning & Development

Post-training feedback

Employee

Starting with a new manager

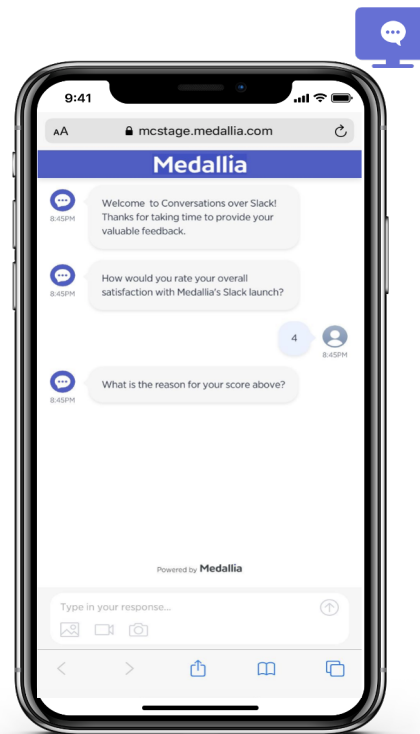**HR**

Micro-pulse to all employees for continuous feedback

Operations

Internal communication feedback after a merger/acquisition

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Enable richer user interactions and engage more users

- Drive higher response rates by offering users the option of answering additional questions based on the relevance of the conversation.

- Enable a seamless user experience via a web page in a mobile app — use custom cards as navigational elements and brand the page to meet your needs.

- Allow users to add photos and videos to give additional context about their experience.
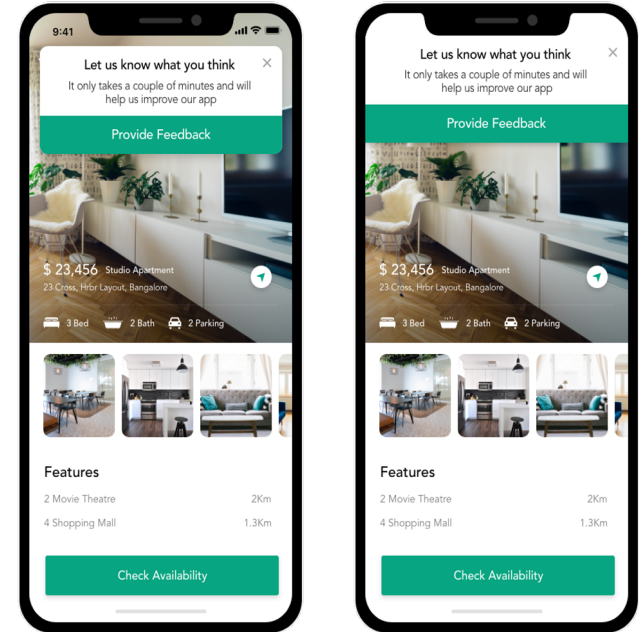

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Increase end user engagement with self-service invitation customization

What:

Ability to support survey invitation via notifications inside the app with self service configuration and customization.

Why this matters:

- Improve survey engagement and conversion rate
- Less intrusive invitation interface options
- Match the app's look and feel

Collect more signals in specific vertical markets
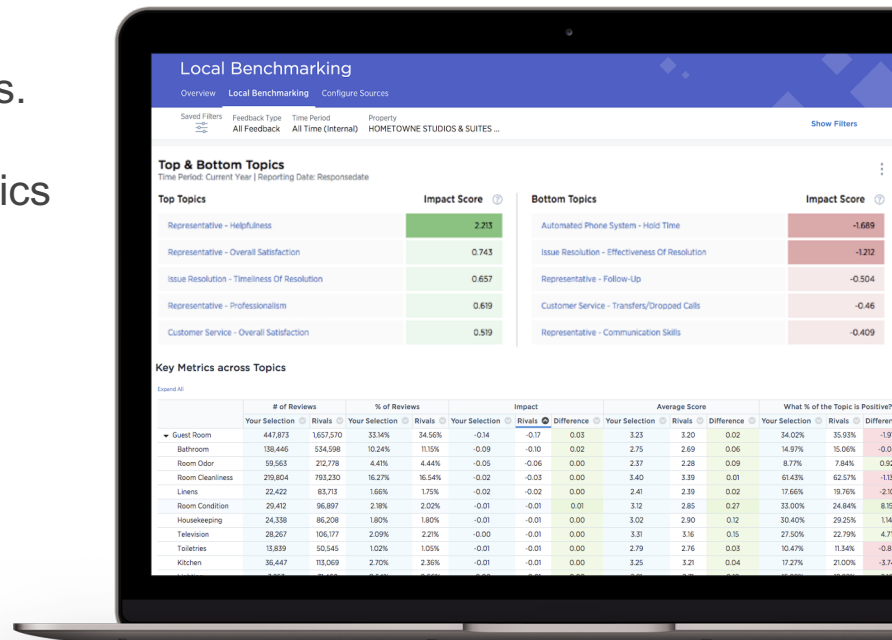
Analyze & Predict

Provide targeted insights on where to focus attention and prioritize CX improvements.

- **Social**
  - TA insights for local benchmarking
- **Action Intelligence**
  - Summarized suggestions & user feedback
- **CX Profiles**
  - Filtered customer lists
- **Text Analytics**
  - TA topic enhancements (tagging, filtering)
  - Top and bottom chart view

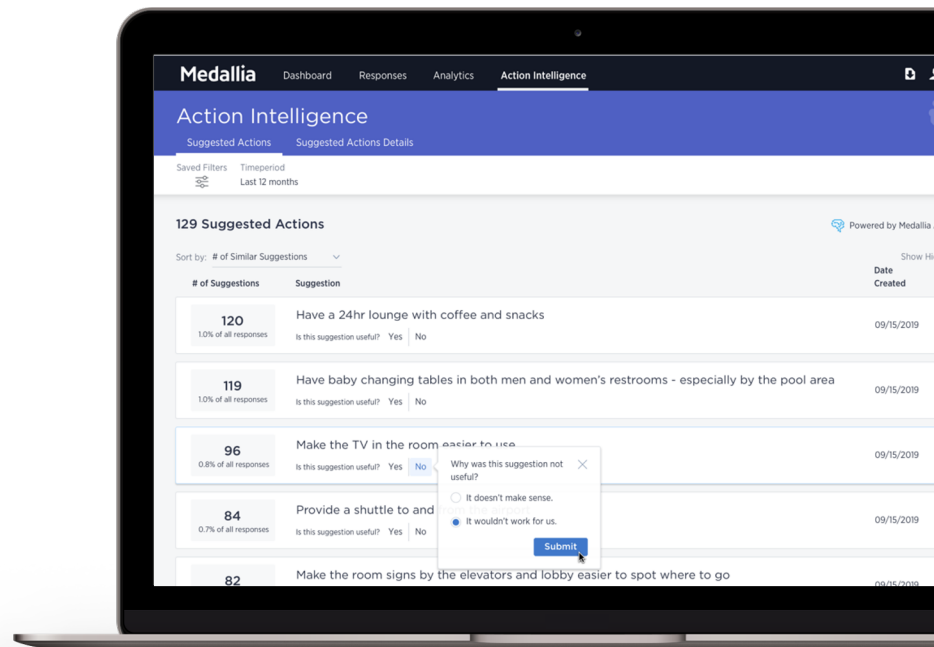# Gain deeper insights on competitor locations

- Get richer analytics to benchmark against rival locations using TA on competitor social reviews.

- Easily determine review sentiment and key topics and themes for your social reviews AND the reviews of your rivals.

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Identify the Most Common Actionable Feedback

- **Summarized suggested actions**
  - See which suggestions are most popular for your business.
  - Understand which types of customers are making these suggestions.
  - Curate & prioritize suggestions for further evaluation.

- **User feedback**
  - Leverage user input to further curate results using the power of Athena AI.

Insight Analyst
Penelope Miller

Action Intelligence

Powered by Medallia
Athena

Suggested Actions   Suggested Actions Details

Saved Filters   Timeperiod
Last 12 months

129 Suggested Actions

Powered by Medallia Athena. Learn more

Sort by: # of Similar Suggestions ⌄

Show Hidden Suggestions ⬤

# of Suggestions	Suggestion	Date Created	NPS	Hide
120 1.0% of all responses	Have a 24hr lounge with coffee and snacks Is this suggestion useful? Yes No	09/15/2019	-88	👁
119 1.0% of all responses	Have baby changing tables in both men and women's restrooms - especially by the pool area Is this suggestion useful? Yes No	09/15/2019	-24	👁
96 0.8% of all responses	Make the TV in the room easier to use Is this suggestion useful? Yes No	09/15/2019	34	👁
84 0.7% of all responses	Provide a shuttle to and from the airport Is this suggestion useful? Yes No	09/15/2019	10	👁
82 0.6% of all responses	Make the room signs by the elevators and lobby easier to spot where to go Is this suggestion useful? Yes No	09/15/2019	-22	👁

Action Intelligence

Powered by **Medallia**
Athena

Suggested Actions   **Suggested Actions Detail**

Saved Filters   Timeperiod
Last 12 months

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Have a 24hr lounge with coffee and snacks

Edit

Current NPS
Timeperiod: Last 12 months

-88

-100   100

Number of Suggestions
Timeperiod: Last 12 months

120

1.0% of responses

Suggestion Trending
Timeperiod: Last 12 months

Response Volume — Last 12 Months (Jun, Jul, Aug, Sep, Oct, Nov, Dec, Jan, Feb, Mar, Apr, May)

Suggestion Profile
Time Period: Last 12 months

NPS Segment   Membership

-88

-100   100

120

1.0% of responses

Response Volume

15

10

5

0

Jun Jul Aug Sep Oct Nov Dec Jan Feb Mar Apr May

Last 12 Months

Suggestion Profile
Time Period: Last 12 months

NPS Segment

Promoter	43 (36%)
Passive	19 (16%)
Detractor	57 (48%)

Membership

Loyalty Rewards	48 (40%)
AAA	12 (10%)
None	60 (50%)

Reason for Visit

Dining	36 (30%)
Leisure	24 (20%)

Spending

> $5,000	60 (50%)
$1,000 - $5,000	36 (30%)

Similar Suggestions
Time Period: Last 12 months

2 It suddenly rained and changed our plans for the night. So we decided to stay in and watch a movie. Would've been nice to have a 24hr lounge with coffee and snacks. We didn't find any grocery or convenient store open at the time.

May 31, 2019 | Go to response details

1 After what happened earlier that day, we thought it would've been handy to have a lounge with snacks and free coffee for hotel guests. Because we didn't have the chance to make it to the store during the day, our evening got worse and worse.

4 My kid was having a stomach bug and threw up his dinner. My husband gave him medicine and I wanted to give him something to eat like crackers to fill up his tummy. We didn't find anything for him. Having a lounge where we can help ourselves to drinks and snacks at any hour of the day would've been helpful.

May 20, 2019 | Go to response details

4 I need to stay awake at these conferences and stretch my legs ever so often. A place where we can grab coffee and snacks in the hotel would've been helpful. I hate to have to leave the hotel and be late for a conference session.

Action Intelligence

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Athena

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Why was this suggestion not useful?   ✕

◯ It doesn't make sense.

● It wouldn't work for us.

Submit

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Penelope Miller

Action Intelligence

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Athena

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Bring together omnichannel signals into a complete view of a customer's experience
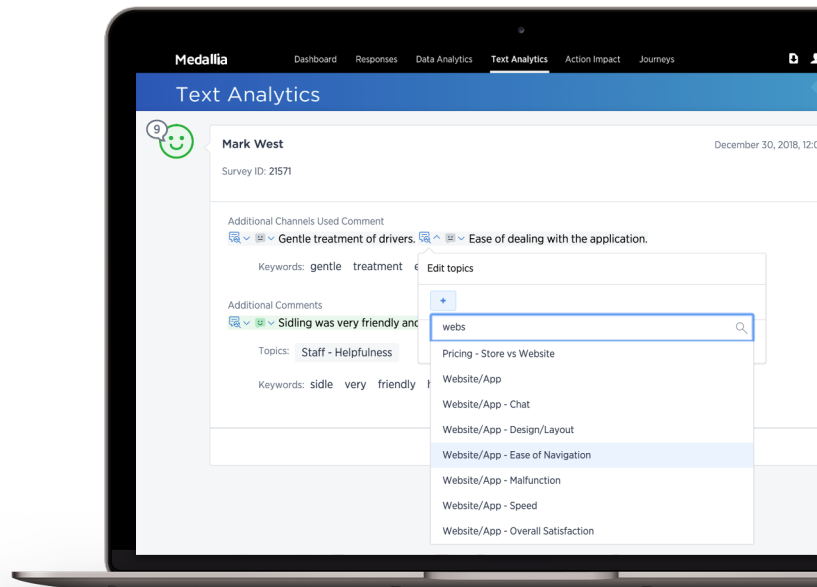
- Filtered customer lists provide look-alike customers that can be used for:
  - identifying candidates for research / insights projects
  - guiding employees for customer prioritization and outreach
  - defining who to include for targeted promotions and marketing / sales campaigns
- Point-and-click creation of customer lists by customer attributes, response / touchpoint-based conditions or program metrics.
- Refresh customer lists to get latest data.
- Download customer lists in CSV or Excel format.
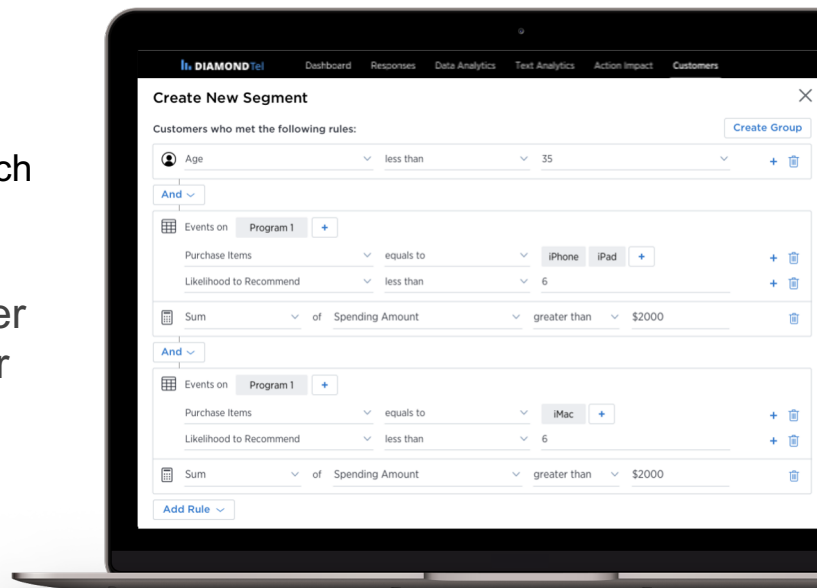
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Medallia Text Analytics — hybrid topic tagging

Human Intelligence + Machine Intelligence Improve Relevance & Coverage in TA topics

- In addition to automatic topic tagging, you can now customize results by setting up manual tags.

- Track manual tagging you've implemented with exports of before / after results of topic tagging overrides.

Quickly Identify Top and Bottom Topics and Themes

- Get an easy to read visual on which topics and themes are having the most positive impact, and which you need to focus on for improvement.

- Easily review which topics customers are talking about the most so you know where to pay attention first.

New Topic Filter Provides More Granular Analysis on Unstructured Feedback

- Quickly drill down your analysis on specific topics, comments and sentiment.

- Customize logic in topic filters in order to get more granular results among key feedback topics.

Empower Action
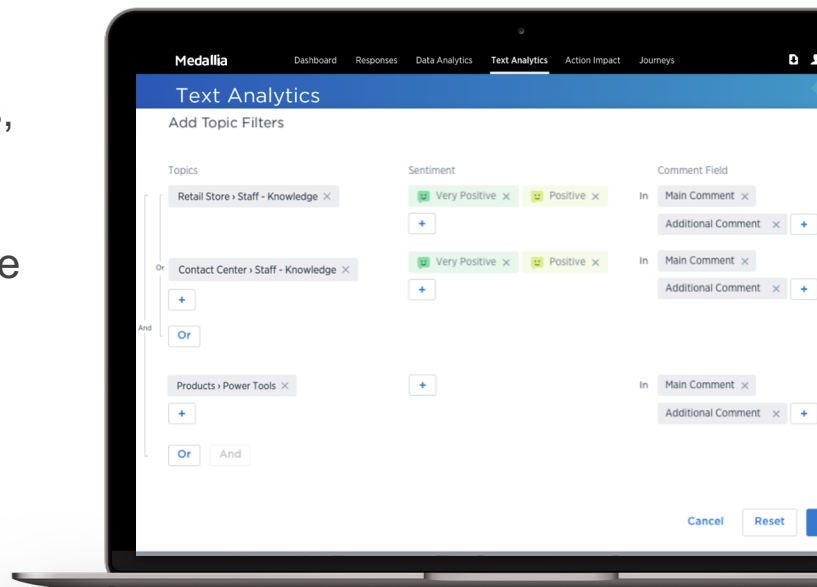
Provide frontline employees tools to take action on CX insights.

- **Mobile**
  - TA sentiment highlighting: Medallia Mobile & Voices
  - Full width visualizations & alert-based notifications in Medallia Mobile

- **Reporting - Web**
  - Dynamic case management

- **Integrations**
  - Partner Communities support in Salesforce app

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Medallia Mobile — mobile TA, full-width dashboards, new notification alerts

Deliver More Personalized Mobile Experience, and Democratize Customer Feedback with TA

- Get the power of Text Analytics sentiment highlighting while using Medallia Mobile & Voices.

- New visualizations provide full-width reports and dynamic cell linking.

- Alert-based notifications deliver more personalized notification experience.
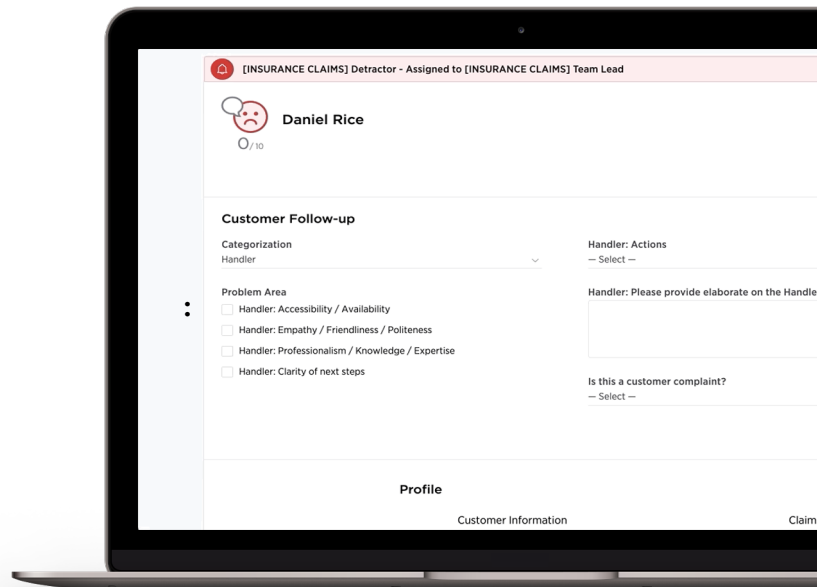

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Enable Frontline Employees to Easily Categorize CX issues

What:

Case Management will now support dynamic conditioning in NGR for showing/hiding individual field options AND entire fields.

Why this matters:

- Frontline employees can more easily categorize customer feedback.
- Forms can be streamlined for faster, efficient use and reduction in error.

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Bring the voice of the customer to your indirect sales channel

- Deliver specified experience insights into Salesforce Partner Communities.

- Enable partners, independent agents or franchisees to close the loop using Salesforce Cases.
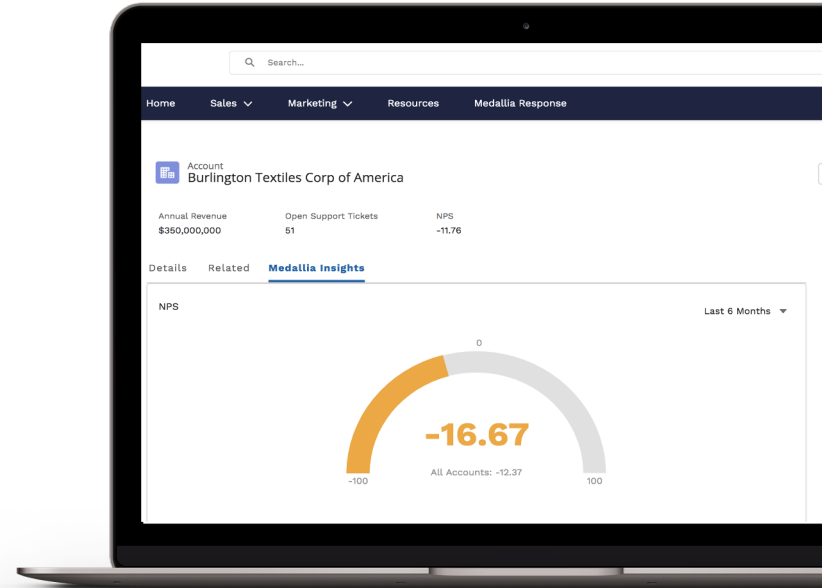
Self-Service Program Mgmt

Confidently manage your evolving experience programs.

- **Admin Suite Programs**
  - Guided setup
  - Sampling / Quarantine bypass
  - Improved Survey Builder
  - Quick Reports
  - Data Exporter

- **Changesets**
  - Integrations & Text Analytics

- **Accessibility**
  - WCAG 2.1 Compliance

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Expand and Scale Experience Programs at the Speed of Your Business

- Intuitive navigation assists users through every step of creating an ad-hoc feedback program.
- Improved survey builder makes setup simple for most common question types, and lets users easily revise questions and edit choices.
- Visual data mapping tool helps users analyze their contact list upload; option to bypass sampling for survey invites.
- Automatic report creation for summary of results & detailed responses.
- Easily share and export feedback data.

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Rapid and Safe Innovation to Experience Programs

- Point-and-click promotion of program changes between sandbox environments, or from sandbox to production.

- Steady expansion of functional scope:
  - Spring '19: surveys, designs & emails
  - Summer '19: alerts, reporting & case management entities
  - Fall '19: control panels & translations
  - Winter '19: Auto-importer specs
  - Spring '20: integrations & TA topic sets

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Increase usability for every user in your organization

- WCAG 2.1
  - Leading capability makes MEC web reporting more accessible to a wider range of people with disabilities, including accommodations for vision impairment, hearing impairment, limited movement, speech disabilities, etc.

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