Medallia

Conversation Intelligence in the Digital Age

Unlock What Customers Really Want

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Agenda

1 How Does Medallia Approach Conversation Intelligence?

**2** Path to Conversation Intelligence Maturity

3 Actions You Can Take Now

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How Does Medallia Approach Conversation Intelligence?

Drive actions and processes based on insights from all conversations across all parties through all channels via best-in-class analytics and AI
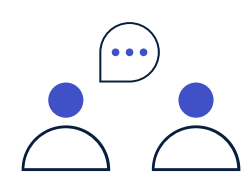
Unify signals across channels with Medallia

Capture every signal from every client and every interaction for total visibility and insights

Phone

Digital

Email

Client profile
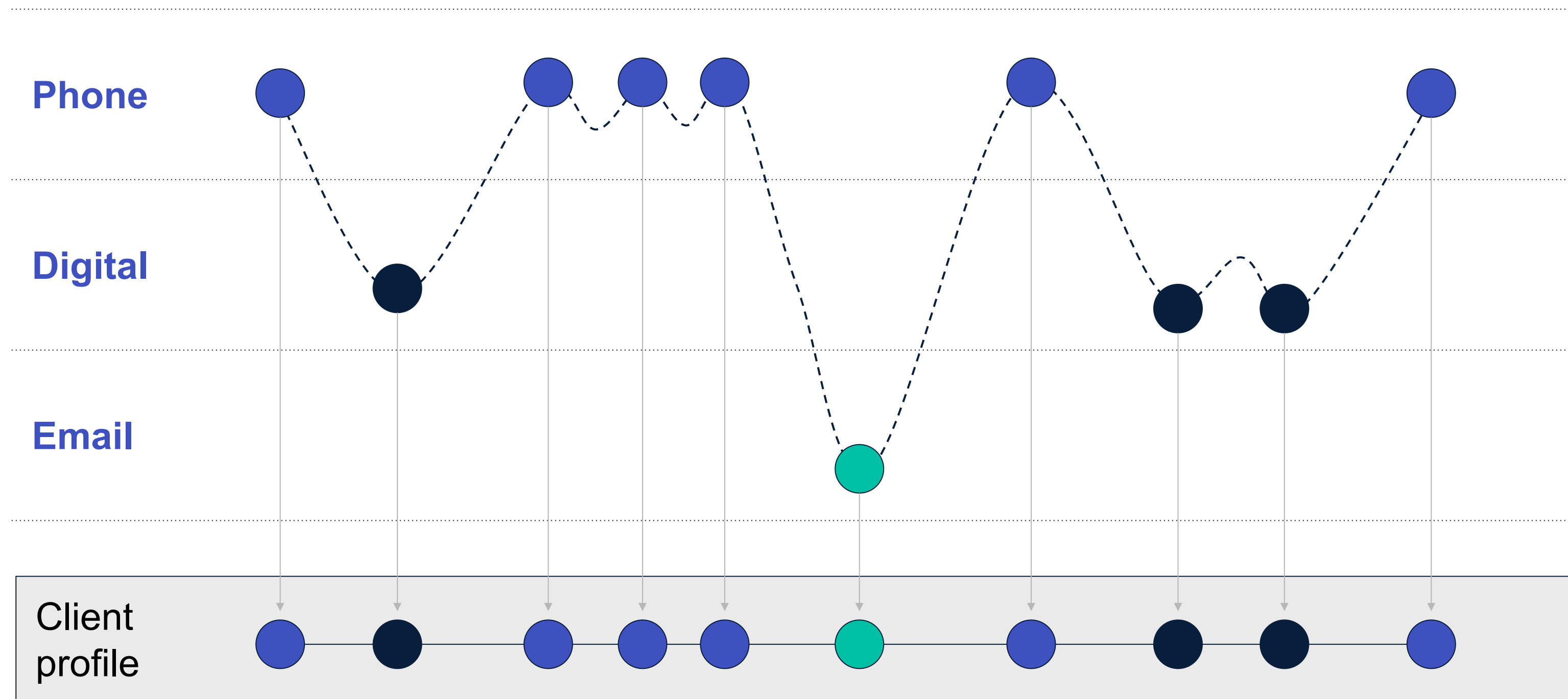
Every client, every channel, every journey

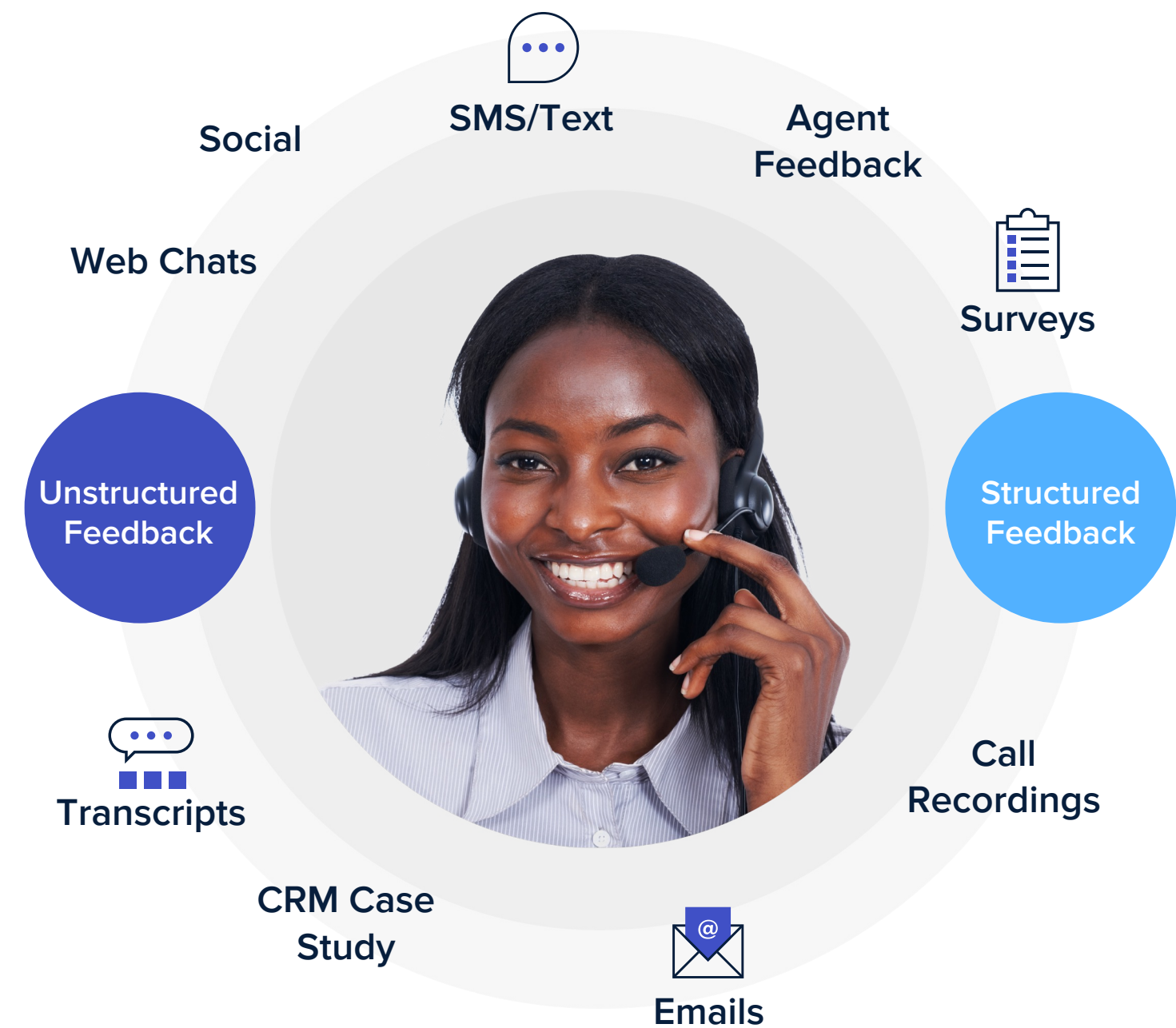Medallia

Deliver the best customer & agent experiences

Continuously capture, analyze, and understand customer & agent feedback

Anticipate customer pain points and proactively respond to retain loyalty

Identify high-value interactions & moments that matter for coaching

Social

SMS/Text

Agent Feedback

Web Chats

Surveys

Unstructured Feedback

Structured Feedback

Transcripts

Call Recordings

CRM Case Study

Emails

Right insights to the right place at the right time to act – at scale
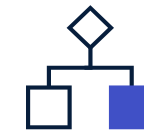
Conversation Intelligence

Listening, capturing & analyzing every conversation to empower you to take action

Drive post call actions

In near real-time
Transcription, alerts, integrations

For all levels of the org
From the frontline to the C-suite

Capture all conversations

Across all parties
From bot to agent to IVR to customer

Through all channels
Email, voice, chat, support tickets, SMS, forums, in-store, video

Uncover actionable insights

Speech & text analytics
To understand sentiment, trends, & pinpoint issues
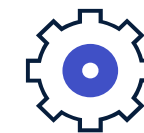
Automated scoring / KPIs
Experience scoring, effort scoring, quality management

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Primary Conversation Intelligence Use Cases

How our customers are seeing the value

| OPTIMIZE CUSTOMER SERVICE | STREAMLINE QUALITY MANAGEMENT | ENHANCE IN-PERSON EXPERIENCES | PERSONALIZE SALES & MARKETING | REDUCE OPERATIONAL COSTS |

Path to Conversation Intelligence Maturity

Experience Management Maturity
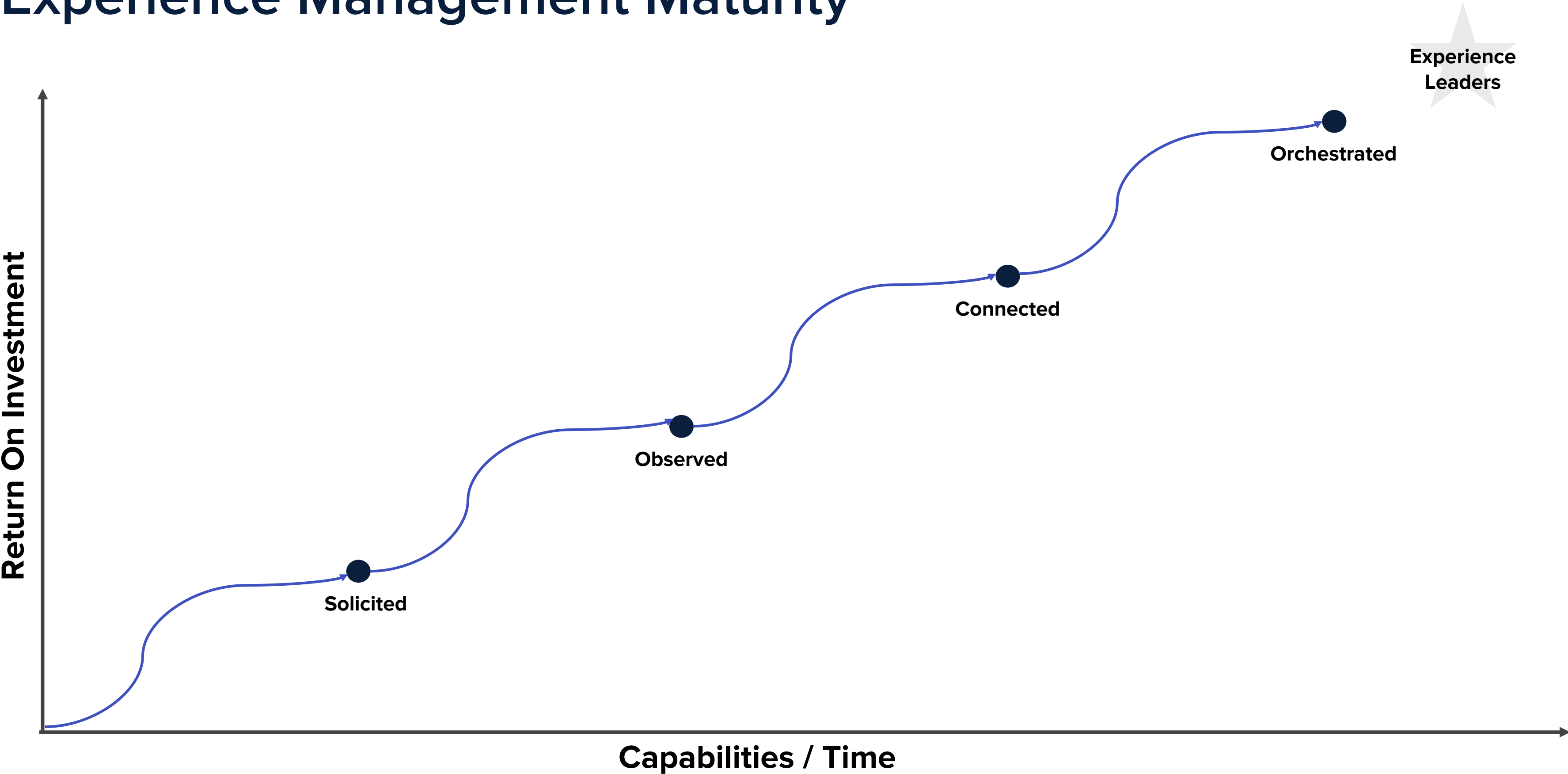
Key areas Medallia Experience Orchestration drives impact

Closed Loop Automation

Automate more closed loop resolutions and democratize best practice with Next Best Experience (NBX) guidance for all closed loop experts

Continuous Customer Engagement

Design automated real-time actions to improve loyalty, reduce cost to serve, and grow your business

Next Best Conversation for Frontline

Scale efficiency & customer loyalty with distributed best practice of individualized recommendations to the frontline

MEDALLIA

Empowering organizations to deliver the best customer and agent experiences

Listen, Analyze & Predict, Act

Capture all signals to uncover truth and surface issues at scale. Break down silos and put actionable insights into the hands of every employee.

- Speech analytics & transcription
- Chat & feedback ingestion
- Analytics for insights & scoring
- Operationalize insights
- Utilize intelligent callback

Engage the Frontline

Create a culture of continuous improvement in customer and agent satisfaction through intelligent automation and humanized engagement.

- Transparent results
- Engage through coaching &
- 1:1s
- Humanize QA

Optimize Omnichannel

Align in a single platform to observe and proactively address omnichannel issues in real time that would previously land in the contact center.

- Digital feedback
- Observed behavior (DXS)
- Direct action

Text Analytics: How it works

Speech Analytics

Hi, I'm calling because I want to close my account.

I see. We'll be sorry to see you go - let me get that started for you. Please hold.

[SILENCE 105]

Speech Analytics
Silence: 24%
Overtalk: 15%
Customer Acoustic Emotion: Negative

Topics:
Account Cancellation
Emotion - Empathy
Agent Ownership

Verbatim Parsing

"I tried to go to your Vienna, VA location at 6, but it was closed even though Google said the hours were 10am-7pm"

verb
article
pronoun
proper noun
conjunction
adjective
noun
time

Categorization & Sentiment

Time Spent

"The woman at the counter, Mary, was so nice, but I ended up taking over two hours to complete this errand with all the driving - what a waste of time for a $19 return! You should really update Google with the proper store hours."

Store Hours

Operationalize Results

Script Compliance

79.4
+7.0
0   100
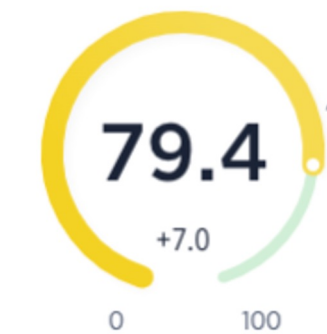
✓ Greeting
✓ Empathy
✓ Ownership
✗ Churn Avoidance

Interaction Metadata

Customer Name: Emily Ferraro
Customer Email: ef465@email.com
Call Center: Northeast
Agent: Jackson Kahn
Call Duration: 7.2 min
CSAT Score: 2

Head of Contact Center

Overview · My Team · Feedback · Closed Loop · Analytics · Resources

Head of Contact Center
Penelope Miller

Overview: Summary

Summary · Touchpoints

Saved Filters	Timeperiod	Reporting Date	Benchmark	
▽	Last 6 months	Creation Date	Prior 6 month	Show Filters

How are we doing overall?

NPS
Last 6 Months

25 ↓3

Goal of 30

Last 6 Months	25
Last 30 days	28
Last Quarter	34
Last Year	51

Call Quality Score ⓘ
Last 6 Months

74 ↓1.2

Goal of 80

Last 6 Months	74
Last 30 days	70
Last Quarter	81
Last Year	70

AHT (seconds)
Last 6 Months

606

All Units
626

Agent Satisfaction
Last 6 Months

7.3

Goal of 8

% SLA on Closed Loop
Last 6 Months

78

Goal of 80

Customer Effort
Last 6 Months

7.1

Goal of 8

How do we compare with other sites?

Site Ranking

Rank	Site	NPS	Call Quality Score	AHT (seconds)	Agent Satisfaction	% SLA on Closed Loop	Customer Effort	Sample Size
1	Site Name 1	25	74	505	7.3	78	7.1	3045
2	Site Name 2	22	55	541	7.1	90	7.0	4199
3	Site Name 3	21	67	600	6.6	87	7.2	3381
4	Site Name 4	20	80	457	6.9	77	6.9	3551
5	Site Name 5	18	76	521	8.9	68	6.6	4128

‹ 1 2 3 4 … 13 ›

Customer Effort

Trend over Time
Last 6 months

Top 3 & Bottom 3 Topics
Last 6 months

Top 3 Topics

Product - Ease of Use	5.8
Product - Availability	3.4
Price - Value for money	1.9

Bottom 3 Topics

Reservation Process and Information	-4.7
Guest Room	-3.2
Rewards Program	-3.2

Channel Ranking
Last 6 months

Rank	Channel	Customer Effort
1	Channel 1	9.0
2	Channel 2	8.5
3	Channel 3	7.1

View all ›

Brand Ranking
Last 6 months

Rank	Brand	Customer Effort
1	Brand 1	9.0
2	Brand 2	8.4
3	Brand 3	8.1

View all ›

Near real-time customer feedback at scale
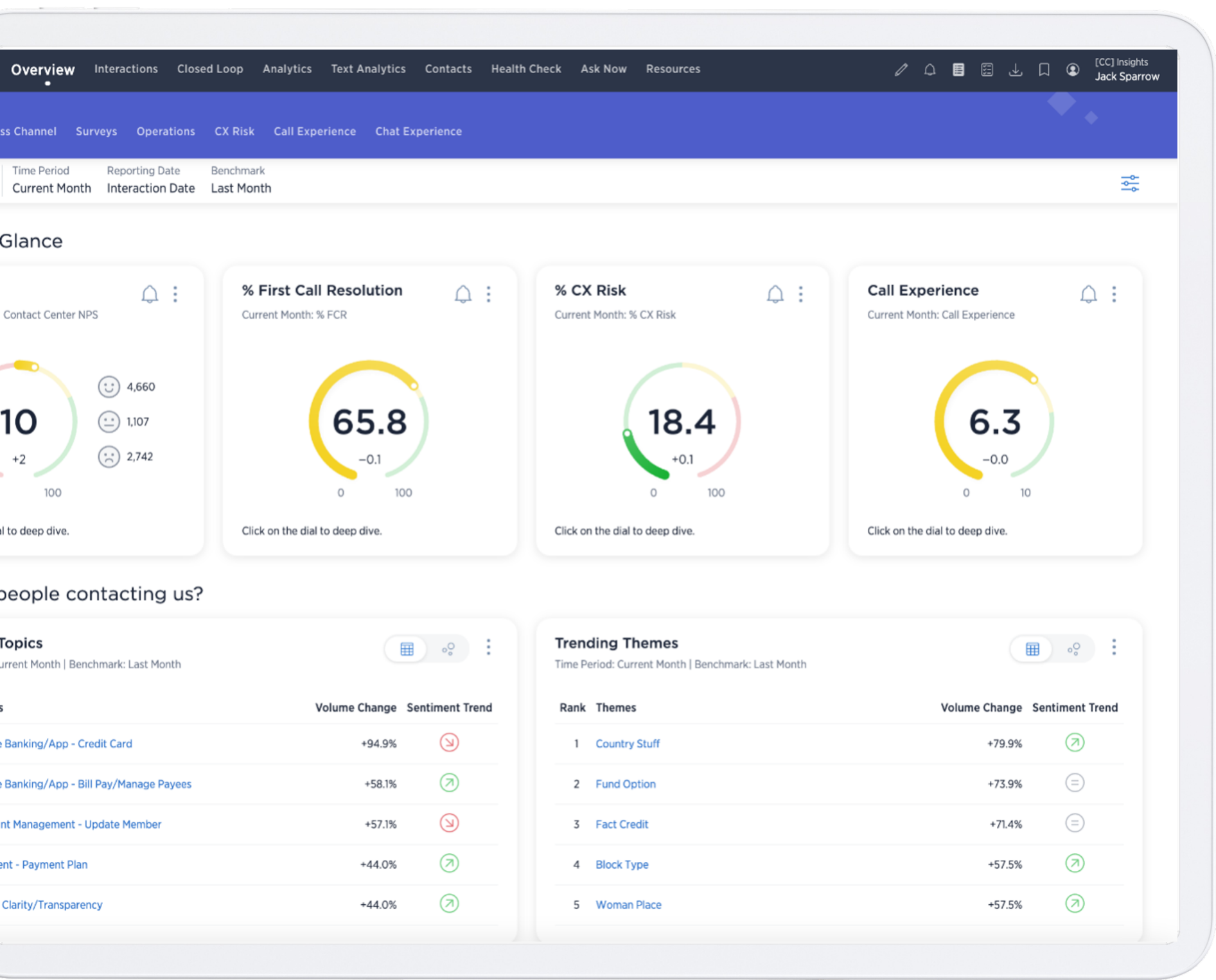
- Capture and **automatically score 100% of customer and agent** interactions.

- **Humanized, post-interaction surveys** to capture CSAT, as well as FCR, CES, NPS, etc.

- Uncover the truth behind all interactions to **know why customers are contacting you** and to **surface issues at scale**.

- **Democratize data** across the organization with purpose- built dashboards by roles.

PROACTIVE CUSTOMER ENGAGEMENT

DIGITAL EXPERIENCE TRANSFORMATION

CUSTOMER JOURNEY ORCHESTRATION

THE NORTH STAR | OMNICHANNEL CUSTOMER EXPERIENCES

Actions You Can Take Now

What Can You Do Now to Drive Change?

Engage stakeholders

- Engage outside teams to understand the challenges they're facing
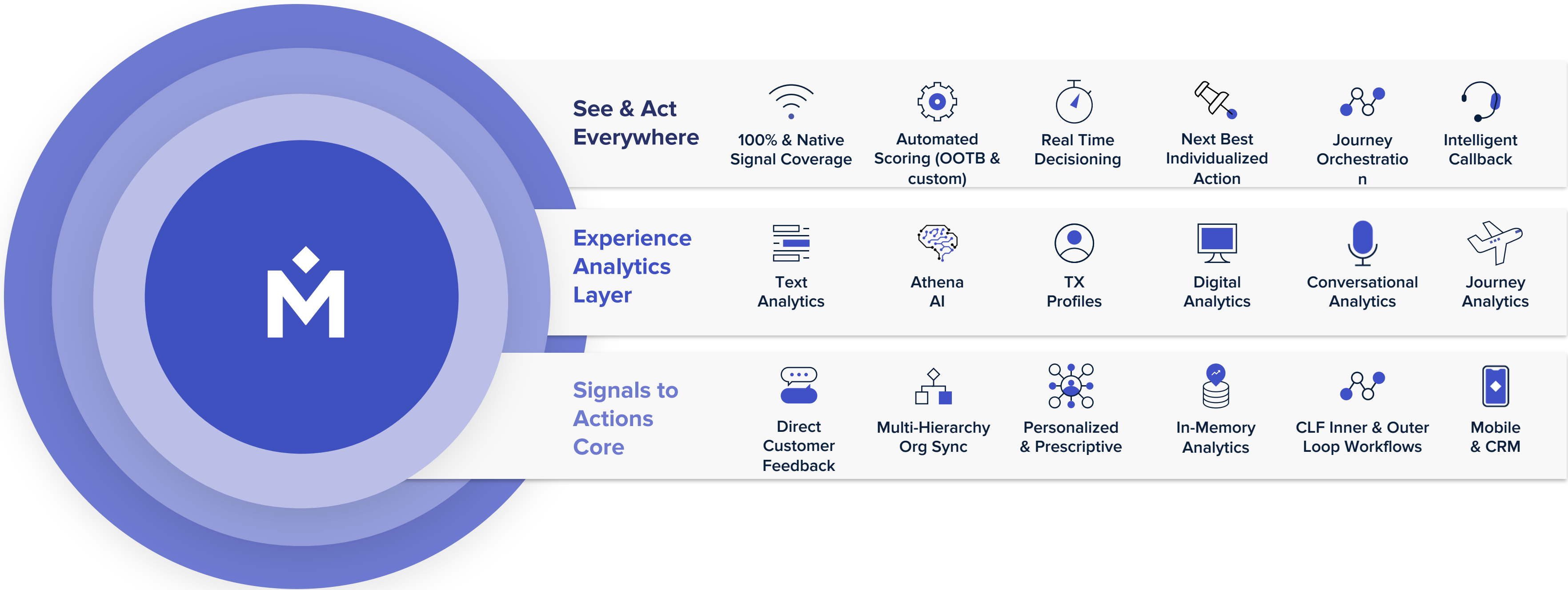- Seek alignment of goals across teams

Define success

- Align team and organizational goals to immediate next steps (people, process, and/or technology)

Map out the future

- Ensure the steps you're taking now allow you to build towards the future. One-offs might be good in the short-term but don't always align to the best future outcomes.

Uniquely Architected for Action

See & Act Everywhere

- 100% & Native Signal Coverage
- Automated Scoring (OOTB & custom)
- Real Time Decisioning
- Next Best Individualized Action
- Journey Orchestration
- Intelligent Callback

Experience Analytics Layer

- Text Analytics
- Athena AI
- TX Profiles
- Digital Analytics
- Conversational Analytics
- Journey Analytics

Signals to Actions Core

- Direct Customer Feedback
- Multi-Hierarchy Org Sync
- Personalized & Prescriptive
- In-Memory Analytics
- CLF Inner & Outer Loop Workflows
- Mobile & CRM

Enterprise Grade Everything

Thousands of Organizations Trust Medallia

to change culture, drive focused action, and create accountability

> "
> And when it comes down to it, anyone can come in and be a vendor; what we needed,
> and what we get through Medallia, is a thought partner.

Director of Consumer Research, Insurance Industry

Q&A

Thank you

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