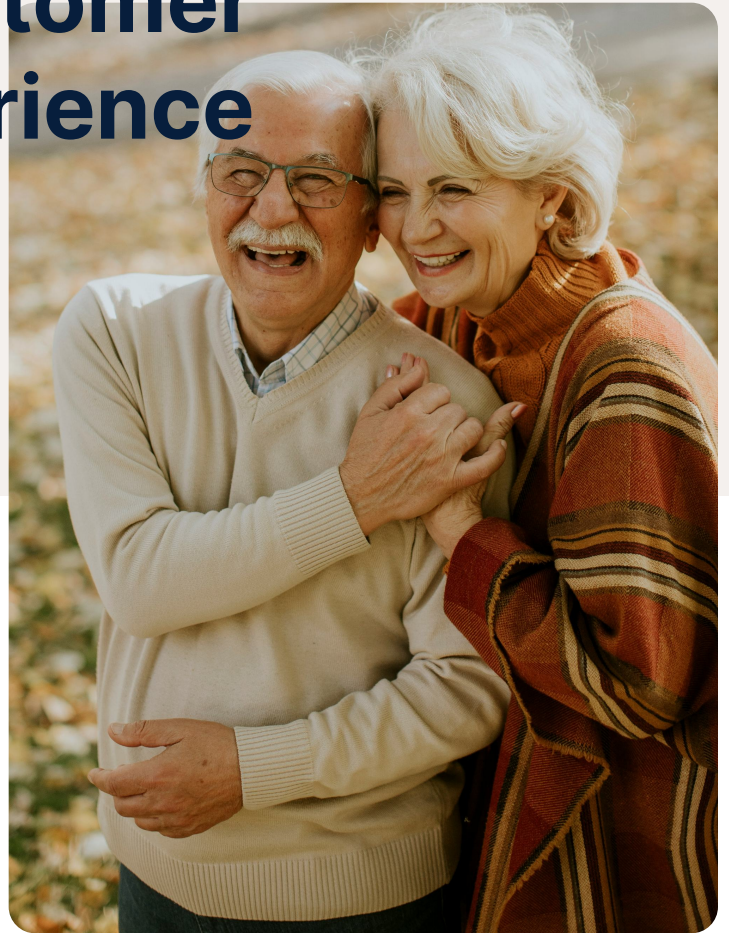**PACIFIC LIFE**

Pacific Life: Using Voice of the Customer to Achieve Experience Excellence

> "*The effective integration of channels across marketing, sales, and service activities is critical to delivering a positive, brand-reinforcing experience at every touchpoint in the customer relationship. Medallia provides us an extendable set of capabilities for a consistent, enterprise-wide view of customer feedback to analyze and act upon from many listening posts.*"
>
> -Rob Goodman, Vice President, Enterprise Customer Experience Office, Pacific Life

PACIFIC LIFE
Industry: Insurance/Finance

#282 Fortune 500
ranking with $217b in company assets and $15b in adjusted operating revenue

10,000+
customer responses to surveys with a closed-loop feedback process

NPS 50+
in excellent range with active financial professionals

3.5 million+
customer calls analyzed and scored

Medallia

Summary

For nearly 160 years, Pacific Life has provided financial strength and stability for families and businesses to help build confidence for generations. Pacific Life continues to demonstrate its commitment to customers through strategic investments which differentiate on experience excellence.

Pacific Life strives to make customers and employees feel confident, respected, and valued after each interaction and overall experience with its brand. To ensure this vision is upheld, the company recognized the need to listen to customers at scale and put the customer voice at the center of its strategy. In partnership with Medallia, Pacific Life sought to develop an optimized, enterprise-wide Voice of the Customer (VoC) program across its different business units and customer channels.

The program's initial implementation in 2023 established a strong foundation for direct and indirect listening across key customer touchpoints.

Now, a full year post-implementation, Pacific Life's journey to leverage customer feedback is well underway. Teams have used customer feedback and insights to develop new processes, create internal efficiencies, and improve the customer experience. The VoC team, in partnership with functional areas of the business, continues to add more listening posts, enhance structured and unstructured data analysis, and translate feedback into actionable insights.

A Strategic Program and Partnership: Capture the Voice of Every Pacific Life Customer

Pacific Life wants customers to feel confident, respected, and valued after each transaction, and with the company overall. Establishing an enterprise-wide VoC program was essential to validate and uphold this vision.

Prior to 2023, Pacific Life's customer listening practices were done in pockets throughout the organization, largely dependent on third-party reports or assessments. While third-party data is valuable, the validation of the insights it brings through internally collected data is a best practice Pacific Life recognized it should adopt holistically.

They established an internal VoC program and team whose objectives are to listen through all forms of feedback (both solicited/direct and unsolicited/indirect), to analyze through structured and unstructured data reporting, and to democratize actionable insights across the business for closing the inner and outer feedback loops.

To achieve these objectives, Pacific Life recognized the need to select a best-in-class experience management platform and partner. Throughout 2022, the team thoroughly explored different options, including a speech analytics POC with a large sample set of calls and corresponding metadata. Other key aspects of Pacific Life's decision were the partner platform's Salesforce CRM integration capabilities and its call coaching offerings.

Medallia was selected as the partner of choice at the end of 2022. The foundational listening capabilities were implemented with Medallia in the first half of 2023. Implementation consisted of a one-time historical load of three years of sales and service calls, plus a near-real-time integration for call data on a go-forward basis. Additionally, implementation included the establishment of relational, transactional, and web surveys.

Now a year post-implementation, Pacific Life and Medallia continue to partner closely to advance and mature VoC efforts across the enterprise at Pacific Life. Some major wins to date include the Medallia platform integration with Amazon Connect for calls and Salesforce CRM for surveys, the business processes to close the loop on customer feedback, and consistently high customer satisfaction metrics across all listening posts.

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> " Our Voice of Customer team at Pacific Life uses Medallia to gather and analyze customer insights, driving actionable changes that enhance both customer and employee experiences. Our mission is to democratize these insights across the company, empowering all business units to prioritize the customer experience and foster a proactive, company-wide movement toward excellence."
>
> -Meghan Colton, Enterprise Voice of Customer Product Owner, Pacific Life

Speech Analytics: Striking the Balance Between AI and Humans

Pacific Life receives millions of customer calls annually across its divisions in service and sales, and has long desired a method to analyze these interactions at scale to improve internal operations and customer experience. Traditionally, supervisors and quality assurance team members in service and sales would pick a handful of calls per agent or sales rep to grade and coach them for improvement. This manual selection process relied on a non-statistically significant sample to draw conclusions on individual performance. This often led to reluctance to trust the data.

Medallia's speech analytics capability now allows 100% of calls to be transcribed, topic-tagged, analyzed, and scored. The translation of unstructured to structured data allows Pacific Life to more methodically assess agent performance and customer experience in aggregate. Teams use this information to detect trends in agent and customer behavior, such as root-cause analysis of website task abandonment.

Pacific Life has been able to monitor the intended behavior of its call center agents for providing exceptional experiences consistently across both internal- and external-outsourced teams. Being able to monitor data-driven topic trends to provide holistic call coaching has become scalable through the automated capabilities provided by Medallia.

Medallia has several proprietary scores that are calculated for calls, including the Agent Quality Monitoring (QM) Score, which measures agent and sales rep performance on a call. Pacific Life has customized the topics and underlying rules that make up this score to measure its desired agent behaviors and SLAs. The VoC team conducted a thorough audit and update of this score, measuring both its accuracy and coverage in tags, to validate its effectiveness.

While the Agent QM Score can capture agent performance in aggregate on major topics, Pacific Life recognized that there is still value in the human-touch approach, which is where Medallia's Agent Connect platform brings value. AI-generated scoring models such as the Agent QM Score allow Pacific Life teams to get a broad depiction of internal performance, but they do not account for the context surrounding a call or the complexities that an individual call may entail.

A dual approach, leveraging AI-generated scoring and analytics along with human call grading and coaching, allows Pacific Life to measure at scale and in-moment to create a well-balanced approach.

Medallia
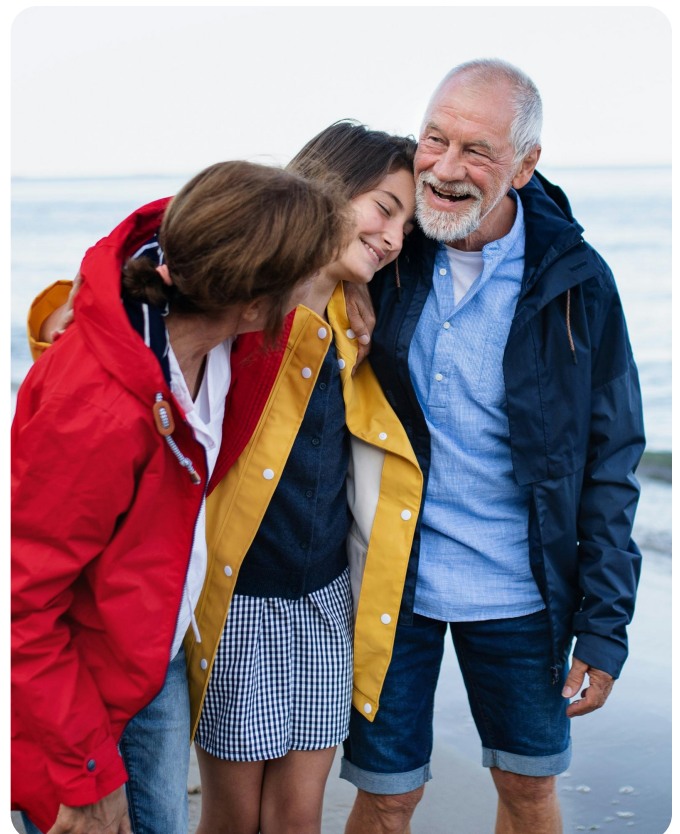
In the Moments That Matter, and Overall

Pacific Life values its customers and the time they take to give direct feedback. As such, it was important to ensure each survey program was established with the intent to use feedback to effect change.

Before engaging with Medallia, Pacific Life did not have a technical solution to trigger surveys in key transactional moments, nor was there a way to conduct automated analysis of unstructured feedback (open-text responses). Pacific Life relied on relational-level surveys with key customer groups to get a sense of customer satisfaction and experience.

While relational surveys continue to be a mainstay in Pacific Life's listening strategy, the Medallia platform has enabled the team to also target customer feedback in key moments that matter, leading to the establishment of a post-contact-center-call survey program.

The post-call survey leverages a tightly integrated solution between Medallia and the Salesforce CRM platform to deliver surveys (via email) to eligible customers and route their responses internally to close the loop. Building the technical foundation to support this program and establishing the business process to maintain it was a cross-functional effort which amounted to great success.

> " Customer listening through Medallia will transform the organization: improving performance, and supervisor and employee experience ... could not be more excited! This is one of the biggest transformation initiatives for Pacific Life!"
>
> -Frank Boynton, Vice President, Customer Service of the Consumer Markets Division, Pacific Life

Survey responses go through Medallia to Salesforce, and when certain conditions are met, the response creates an alert for the Operations team to review and act on. Response rates have steadily increased from 7 percent to nearly 10 percent in the year since this survey launched, which the team attributes (at least in part) to the effort to respond to feedback given. Additionally, while satisfaction numbers are consistently in the range of 9 out of 10, the team has found that the negative responses they do get illuminate a breakdown in processes or behaviors which can be remedied more swiftly than ever before.

Pacific Life's VoC strategy of listening at both a relational and transactional level allows for both a "temperature check" on customer experience, as well as true diagnostic insights to create meaningful improvements both internally in operations and externally for the customer.

Request a demo at:

↗ www.medallia.com

About Medallia

Medallia is the pioneer and market leader in customer, employee, citizen, and patient experience. Medallia Experience Cloud captures billions of experience signals across interactions including all voice, video, digital, IoT, social media, and corporate-messaging tools. Medallia uses proprietary artificial intelligence and machine learning technology to automatically reveal predictive insights that drive powerful business actions and outcomes. For more information visit **http://www.medallia.com**.

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