Coffee & Conversation: Stay Ahead of the Competition with Ease

How Agile Research Can Help

September 19, 2024

AGENDA

1   WHY MARKET RESEARCH MATTERS IN CX

2   WHAT IS AGILE RESEARCH?

3   KEY SELF-SERVICE FEATURES

4   DEMO

5   NEXT STEPS

SPEAKER

Henry Bricker
Principal Product Manager
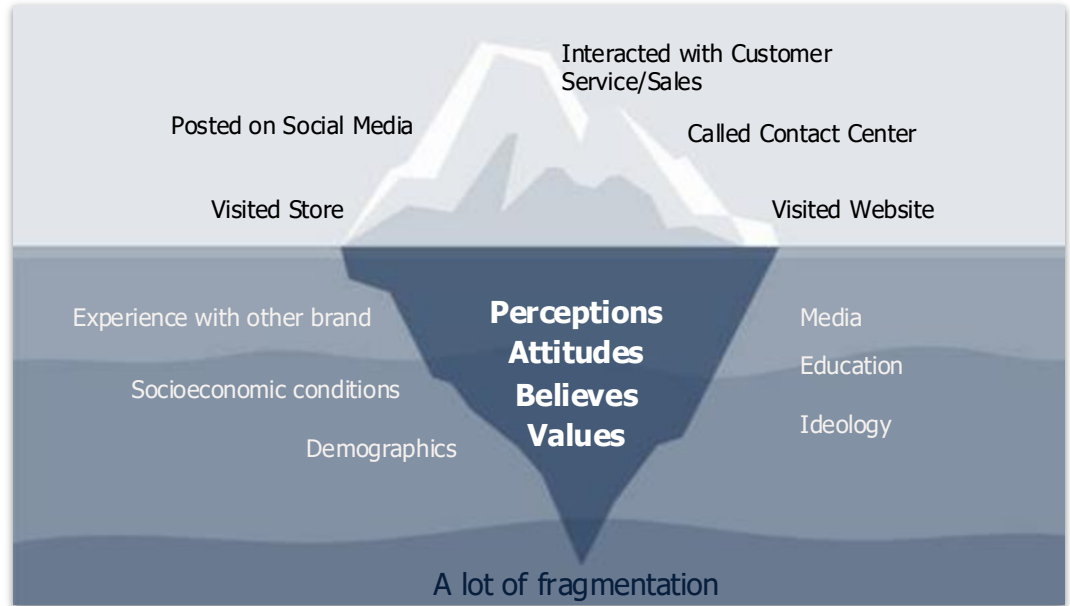Medallia

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Why Market Research Matters in CX

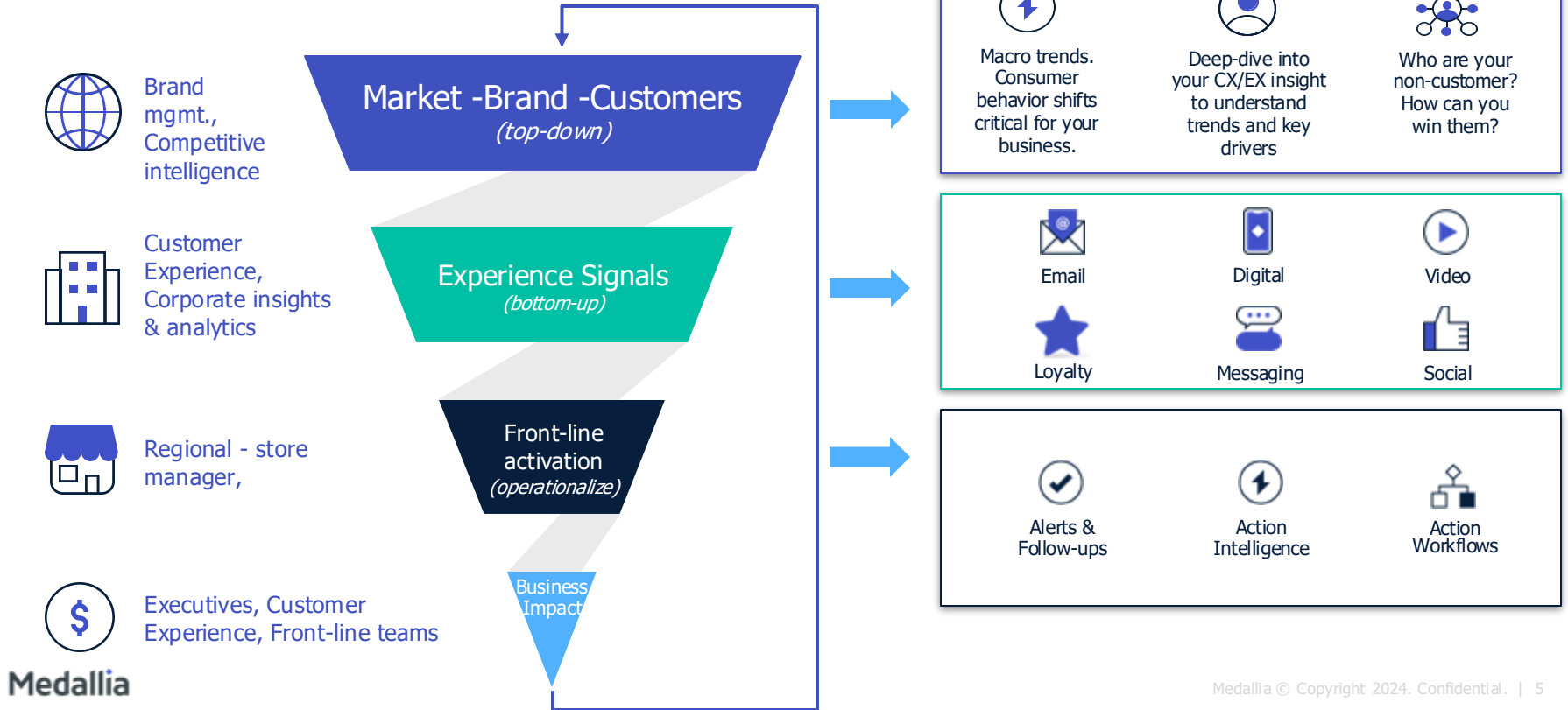# Customer Experiences are much more than what we see on the surface

Experiences with the brand
Proactive Feedback
Vocal Minority

Experience outside of the brand
Non-Customers
Silent Majority

Interacted with Customer Service/Sales

Posted on Social Media

Called Contact Center

Visited Store

Visited Website

Experience with other brand

**Perceptions
Attitudes
Believes
Values**

Media

Education

Socioeconomic conditions

Ideology

Demographics

A lot of fragmentation

Turning signals to actions

Combining the inside and the outside of your four walls

Brand mgmt., Competitive intelligence

Customer Experience, Corporate insights & analytics

Regional - store manager,

Executives, Customer Experience, Front-line teams

Market -Brand -Customers
(top-down)

Experience Signals
(bottom-up)

Front-line activation
(operationalize)

Business Impact

Macro trends. Consumer behavior shifts critical for your business.

Deep-dive into your CX/EX insight to understand trends and key drivers

Who are your non-customer? How can you win them?

Email

Digital

Video

Loyalty

Messaging

Social

Alerts & Follow-ups

Action Intelligence

Action Workflows

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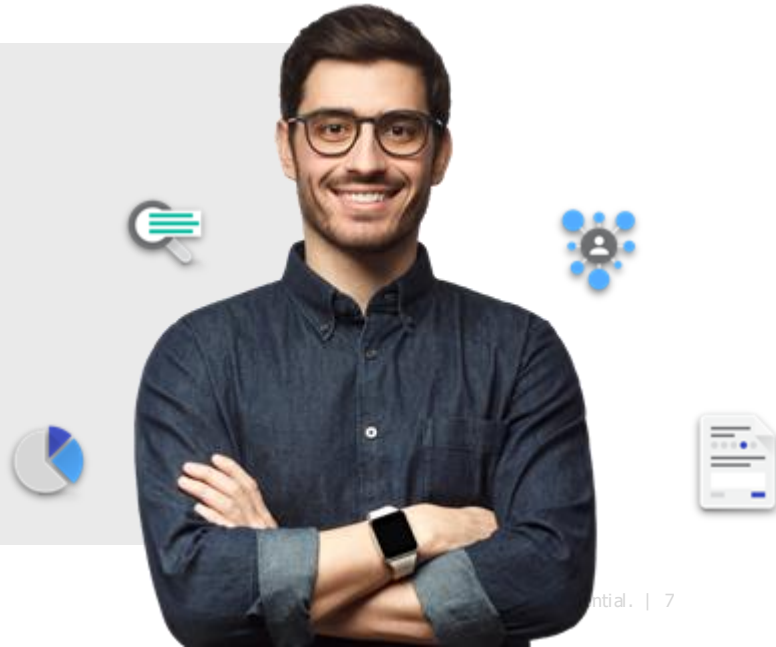
What is Agile Research?

WHAT IS AGILE RESEARCH?

➤ **DIY** survey & **research** analytics within MEC

➤ **Self-service** tool for **quickly** launching one-off surveys and research projects

➤ **Unified** platform offering a seamless access to MR teams to quickly deliver actionable insights

When to use Agile Research vs. Other MEC Capabilities

MEC Surveys

Launch a **comprehensive and structured CX or EX program** for ongoing experience measurement

Ask Now Surveys in MEC

Quickly **add a few new questions** to your **existing MEC** experience program surveys

Ad Hoc Surveys in MEC

One-off CX or EX focused surveys using a customer list, integrated with MEC reporting and text analytics

Medallia AGILE RESEARCH

Advanced question types for one-off CX/EX surveys

Self-service market research with advanced question types, **3rd party panel access**, & flexible reporting

Research Services team available to support full-service projects.

Benefits of conducting your own market research with Medallia

Unified Platform

Users can access Agile Research in Medallia and have the ability to bring data into MEC reporting.

Reduce Operational Costs

Agile Research is part of Medallia Experience Cloud at no additional cost.

Speed-to-Insights

Researchers can move quickly & iterate on demand for one-off surveys, and ongoing studies learn about topics of interest.

How we can help you

Medallia's Research Services team has nearly 20+ years of experience designing and executing strategic research projects that solve the following challenges:

- Research Program Strategy & Management
- Brand Development/Tracking
- Customer Journey
- Segmentation
- Target Customer Exploration
- U&A
- Pre/Post Testing & Measurement
- Competitive Benchmarking (EX/CX)
- Tracking Studies
- Cultural Understanding

- UX Qualitative Usability Study
- UX Quantitative Navigation & Content Organization Study
- Product Launch Innovation
- Pricing and Conjoint Analysis
- Content & Communications Development
- Product Development & Testing, User Experience
- Panel Sample & Recruitment
- Survey and/or Discussion Guide Design
- Account/Executive Interviews

By Combining & Adapting the Following Methodologies

- Focus Group & In-depth Interviews
- Ethnography
- Kiosk and Intercept Study
- In-store experience
- Dynamic Workshops
- Online Bulletin Boards and Diaries

- Online & Mobile Surveys
- Advanced Analytics
- Reporting & Storytelling (including Showreels)
- Expert Knowledge in Medallia Research Technology Software

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Solutions for researchers qualitative & quantitative needs

Brand Management

Brand Tracking

Ad Testing & Marketing Effectiveness

Thought Leadership

Keep a pulse on brand perceptions

Behavioral

Usages & Attitudes

Path to Purchase

Segmentation

Understand the "why" behind CX insights

Innovation

Ideation

Concept Development & Testing

Price Testing

Get feedback before launching new products

Market Landscape & Ad-Hoc CX

Competitor Analysis

Market Sizing

Emerging Trends

NPS, CSAT

Customer Effort

Understand market & competitive analysis

Key Self-Service Features

Key Features

Self-Service

- **Quickly** build & launch one-off surveys and advanced research studies
- Build & customize **smart reports & dashboards**
- Track your survey results **in real-time**
- Seamless access for **Market Research** teams via **MEC**

Quantitative Research

- Advanced statistical analysis for complex research projects, incl **MaxDiff, Conjoint**
- **20+ unique question types** incl slider, matrix text box, side-by-side, card sorting, image selecting, etc.
- **Automated notifications** to quickly interact with respondents

3rd Party Panel Research

- Build your target audience directly in Agile Research and get immediate access to millions of respondents worldwide through a leading 3rd party panel provider

Panels

A group of individuals who have agreed to participate in surveys, discussions, or other forms of research conducted over the internet.

Target a specific audience
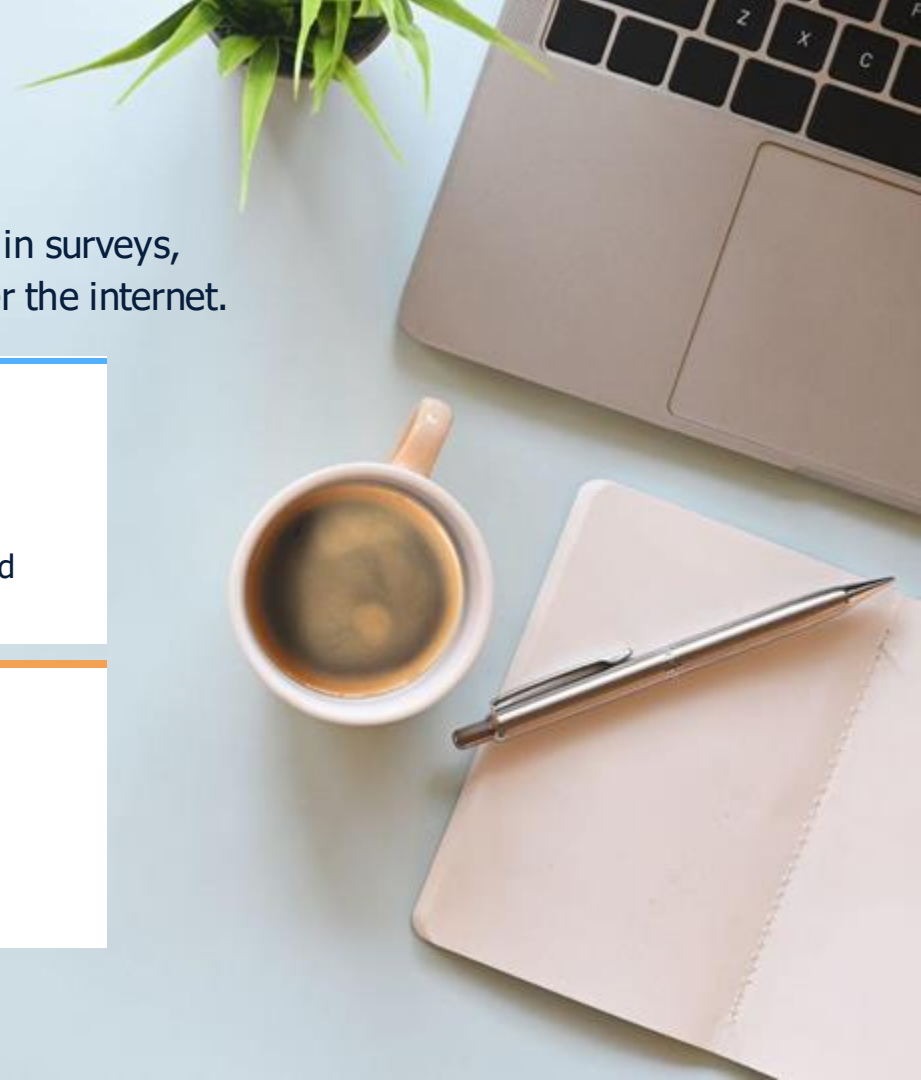
Cost-effective

Quick Turnaround

High participation rates

Quality Data

Extremely Versatile

What you'll learn in today's 20-minute demo:

- **Building a survey:** Overview of powerful market research question types and advanced branching logic

- **Customization options:** Advanced customization options and how to tailor the survey's appearance to your brand

- **Distribute:** How to send your survey using common channels and our targeted 3rd party panel

- **Reporting:** Different data visualizations and analysis tools available and how to share them with your stakeholders

Q & A

Next Steps

How to Enable Agile Research in Your Instance

Medallia Customers on EDR

NO PS HOURS NEEDED you can use your EDRs

Reach out to your CSM requesting access, they will send you a legal letter to sign

Your account manager will notify you once your account has been provisioned

After your Agile Research account is provisioned, submit a technical support case with the roles in MEC you want to enable access for

Medallia Customers **NOT** on EDR

You will need to switch over to EDR to gain access to Agile Research

Please reach out to your account manager for more information

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Agile Research Enablement

*An enablement App that provides resources for **learning about and kickstarting the Medallia Agile Research tool** for your platform*

ABOUT THE OFFERING: Agile Research Enablement App is an educational App that provides a starting point to learn about the Medallia Agile Research tool, which offers self-service survey and research analytics capabilities within MEC. It allows users to quickly launch one-off and ongoing surveys without impacting their structured CX/EX programs.
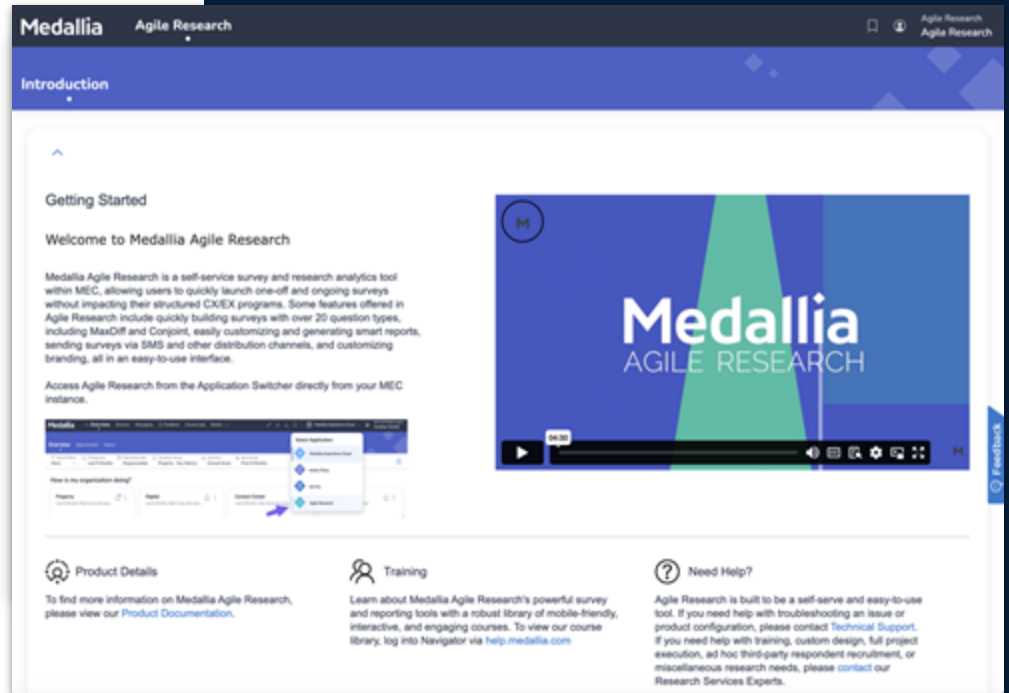
Upcoming Market Research Events & Thought Leadership

The latest happenings in Market Research

- **Navigator Live:** New Market Research Session: [Available On Demand](#)

- **New MUG Chapter:** NEW Market Research MUG going live on September 25th: [Join Here](#)

- **Upcoming Market Research Thought Leadership:**
  a. September: Customer Views on Brand Loyalty
  b. October: Latest Employee Experience Trends
  c. October / November: CX Practitioner Views on AI

- [**View Latest Market Research Reports & Analysis**](#)

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Thank you!

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