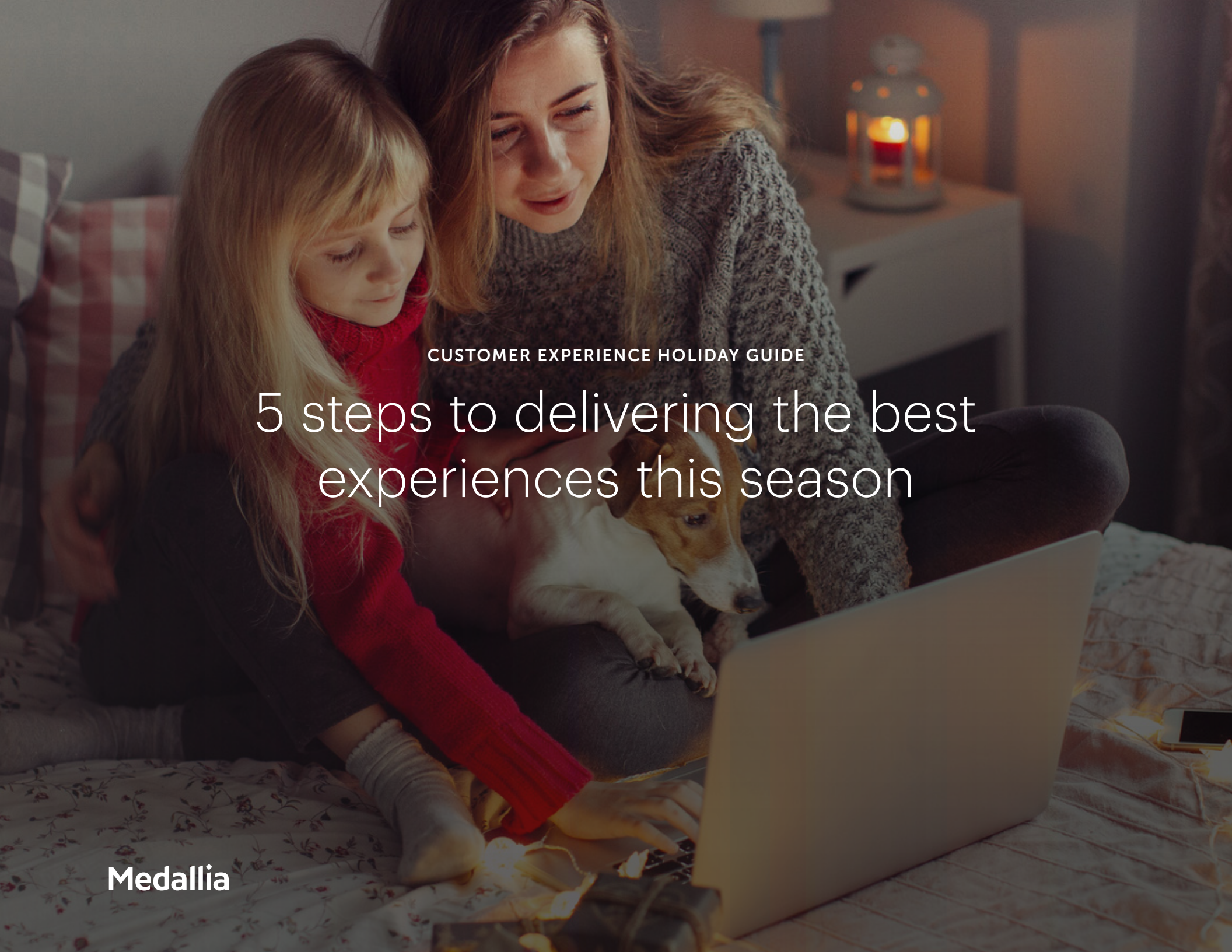

CUSTOMER EXPERIENCE HOLIDAY GUIDE

5 steps to delivering the best experiences this season

Medallia

Introduction

The 2020 holiday season will be the climax of a year already defined by the sweeping change it brought to nearly every aspect of our personal and professional lives. The restriction of physical interaction has accelerated consumers' flight to digital to interact with your business, driving the need for safe and seamless experiences this holiday season. 46% of U.S. consumers have already deserted brands or retailers this year due to poor experiences.[1] But as most of us are still catching our breath from the shutdown and reopening, there is limited time to optimize new operating models before the holiday surge. No matter how much progress you have made in the first half of this year, winning and maintaining consumer loyalty this holiday will be challenging.

The good news is that there is still time to prepare key commerce channels to deliver the experiences customers expect. Our Holiday Guide shows you how to quickly and easily infuse experience management tools into your holiday strategy. The five key steps are:

- Create digital experiences that fulfill every need
- Conduct delightful, low-contact, in-person engagements
- Optimize every pickup and delivery
- Make the contact center an epicenter for change
- Share insights across the organization

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01 Create digital experiences that fulfill every need

Embrace the fact that consumers use digital channels for everything from inspiration to safety protocols to purchasing. 47% of global shoppers are more interested in shopping online for the holidays this year compared to last year.[2] To ensure no cart goes abandoned, focus on preparing your digital channels for high volumes before code freezes for the season:

Start early.
Beginning with Amazon Prime Day, now in October, 2020 will be the year consumers finally shop early for the holidays.[3] But beware: more than 50% of consumers abandon websites after seeing only one page.[4] Whether it's inadequate content, broken workflows, or missing online support, you need to start engaging customers today to understand the "why" behind their online behaviors and what to prioritize to ensure you hit Q4 revenue goals.

Be flexible.
Thanks to the accelerated rate of change we have all witnessed in 2020, brands need to be nimble in their approach to any experience. Flexibility is especially important within digital experiences as organizations have the ability to personalize consumers journeys at scale. To quickly validate new solutions, be sure you have easy to manipulate survey designs that give every team the ability to ask questions that are pertinent to their specific markets and roles.

Add personal touches.
Curate consumers' online experience like you would their in-store by adding personal touches. To create memorable ones online, be sure to capture everything you know about your customers in one centralized platform. With a more complete view, you can quickly deliver thoughtful, personalized digital experiences for different consumer segments.

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CASE STUDY

Using deeper insights to drive online customer conversions

With the current impetus to move consumers in and out of stores as fast as possible, Dick's Sporting Goods has learned how to increase digital dwell time and online conversions. Once Dick's started integrating targeted feedback from Medallia Digital with performance and conversion metrics from Adobe Analytics, they were able to see and quickly fix the issues causing consumers to leave. The brand has successfully decreased bounce rates by 50% and exit rates by 40 basis points. This strategy also worked on driving conversions, as Dick's saw a 21% increase on high-value exercise equipment conversions. And what's more, they deployed over 60 surveys with a one-man customer experience team, proving that personalization can be achieved at scale even with limited resources.

> Thanks to the voice of customer data captured by Medallia, we are able to identify and eliminate bottlenecks in our digital customer journeys.

Miche Dwenger,
VP Ecommerce Experience, DICK'S Sporting Goods

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Quickly discover whether you're delivering excellent experiences with these tools:

The Digital Disruption Quickstart allows you to collect feedback to prioritize improvements. As customers share their in-the-moment feedback, you'll be able to immediately identify pain points and fix them fast.

AskNow deploys new questions for ongoing surveys at a moment's notice and collects responses in real time. AskNow capabilities are included in every Medallia Quickstart solution.

02 Conduct efficient, low-contact, in-person engagements

While part of your physical location has likely become a waystation, some customers will still want a safe environment to visit when holiday nostalgia kicks in. But do not mistake nostalgia for whimsy. 77% of consumers consider the amount of in-person interaction required at a business when deciding whether or not to visit it.[5] Ensure your customers feel confident when visiting your physical locations with these tips:

Proactively communicate.
Months of uncertainty has consumers hungry for information about any new safety measure or operating protocols at your locations. While it is important to use every channel possible to share these updates, it is equally important to engage customers quickly with a micropulse, or in-the-moment with text, video, or voice enabled post-visit surveys to discover if the measures you are taking meet their expectations.

Reimagine high-touch interactions as contactless ones.

SMS quickly became a hero of the COVID-19 world, from powering contactless payments to providing real-time delivery updates. But did you know that SMS messaging can transform 80% of face-to-face interactions into personalized, contactless engagements? By using an AI-powered, two-way messaging platform, you can automate personalized responses at scale, which frees employees from tedious tasks like having to reply directly to every text while maintaining the high-touch feel of human interactions.

Glean innovative solutions directly from your community.

Your customers and employees can offer a wealth of ideas on how to improve the experience in physical locations. Lean into their expertise by challenging them to share and vote on ideas that make experiences at your establishments safer for everyone involved.

THE HOTEL AT AUBURN UNIVERSITY
AND DIXON CONFERENCE CENTER

CASE STUDY

Enhance safety measures and guests' experiences with AI-powered SMS

When the Hotel at Auburn University & Dixon Conference Center was suddenly sold out, the hotel turned to Medallia Zingle's intelligent, two-way messaging platform to help them quickly scale contactless operations with a limited staff and ease guests' anxiety around traveling. With Zingle, the team was able to proactively communicate safety precautions and operational changes to guests as well as answer their questions via automated responses. These AI-powered responses helped cut phone calls by 30%, freeing the limited staff to attend to guests' more complex needs. Guests clearly approve of the personalized attention and proactive updates: the hotel has received 100% five-star TripAdvisor reviews since the pandemic began.

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Start optimizing in-person experiences today with no-IT-required solutions:

- **Quickstart Customer Micropulse** helps you better prepare for the future by engaging targeted customer segments about their evolving needs with simple two to three-question surveys using Text Analytics and optional video capture and analysis.
- **Medallia Zingle** and Conversations delivers in-the-moment, personalized experiences and empowers frontline employees to respond quickly via two-way mobile messaging.
- **Medallia Crowdicity** helps organizations crowdsource ideas quickly, drive a culture of innovation, and increase employee engagement.

"

We obviously had to make concessions for the safety of our guests, but we didn't want to make it about cutting guest experience. The keys have been setting expectations and clearly communicating with guests — and that's where Zingle has really shined.

Johnston McCutcheon
Front Office Manager

03 Optimize every pickup and delivery

The limited access to physical locations has given consumers few options to receive their goods and services, so brands have been coming to them. To fulfill this need, organizations have created a wide range of delivery and pickup options for consumers. While both will be necessary to survive the upcoming holiday season, pickup has quickly become the go-to method for consumers to receive goods quickly and safely. In April 2020, retail, grocery, and restaurant pickup orders grew 201% compared to February 2020, and jumped 119% against the 2019 holiday peak, typically the heaviest season for pickup orders.[6] To prepare for this holiday's surge, ensure every contactless handoff is safe and seamless:

Check it twice.

Frontline teams are learning new operating procedures as delivery and pickup orders continue to climb. Testing new skills at new volumes does not need to result in inefficiency and inaccuracy. To quickly identify any inefficiencies, follow up with customers

immediately after goods and services are transferred via text, audio, or video with a three-to-five question survey. Real-time insights into these experiences also help frontline teams learn and adjust their approach in the moment.

Automate touchless interactions.

Asking customers to call in when they arrive for curbside pickup at holiday volumes is a recipe for chaos. Ditch the phones for a smarter way to work with AI-powered, automated text message responses that allow employees to focus on order accuracy and speed and never leave a consumer waiting for a response.

Discourage Scrooges with video.

It can be hard to get into the holiday spirit, especially with social distancing protocols. But contactless interactions don't need to be completely impersonal, thanks to consumers' avid video adoption. Video has allowed consumers to gather and connect throughout the pandemic, so give them the option to leave video feedback in your post-fulfillment engagements. Powerful video transcription and AI-powered sentiment analysis can be used to help build empathy and strong connections between your customers or employees by humanizing feedback.

noodles & COMPANY

CASE STUDY

Humanize contactless off-premise experiences to increase repeat visits

When COVID-19 forced the overnight acceleration to digital and offsite dining experiences, Noodles & Company turned to the data they received from Medallia to ensure guests' experiences remained positive. Once an order is fulfilled via delivery, curbside, or shelf pickup, Noodles can quickly identify any areas of improvement from guest feedback. Key to their success has been the addition of email based post-visit surveys, on top of receipt-based surveys, to their customer engagement methods. Email based engagements have increased response rates by 97%, which enables their team to better understand how guests feel about their off-premise experiences.

Email based engagements have increased response rates by 97%.

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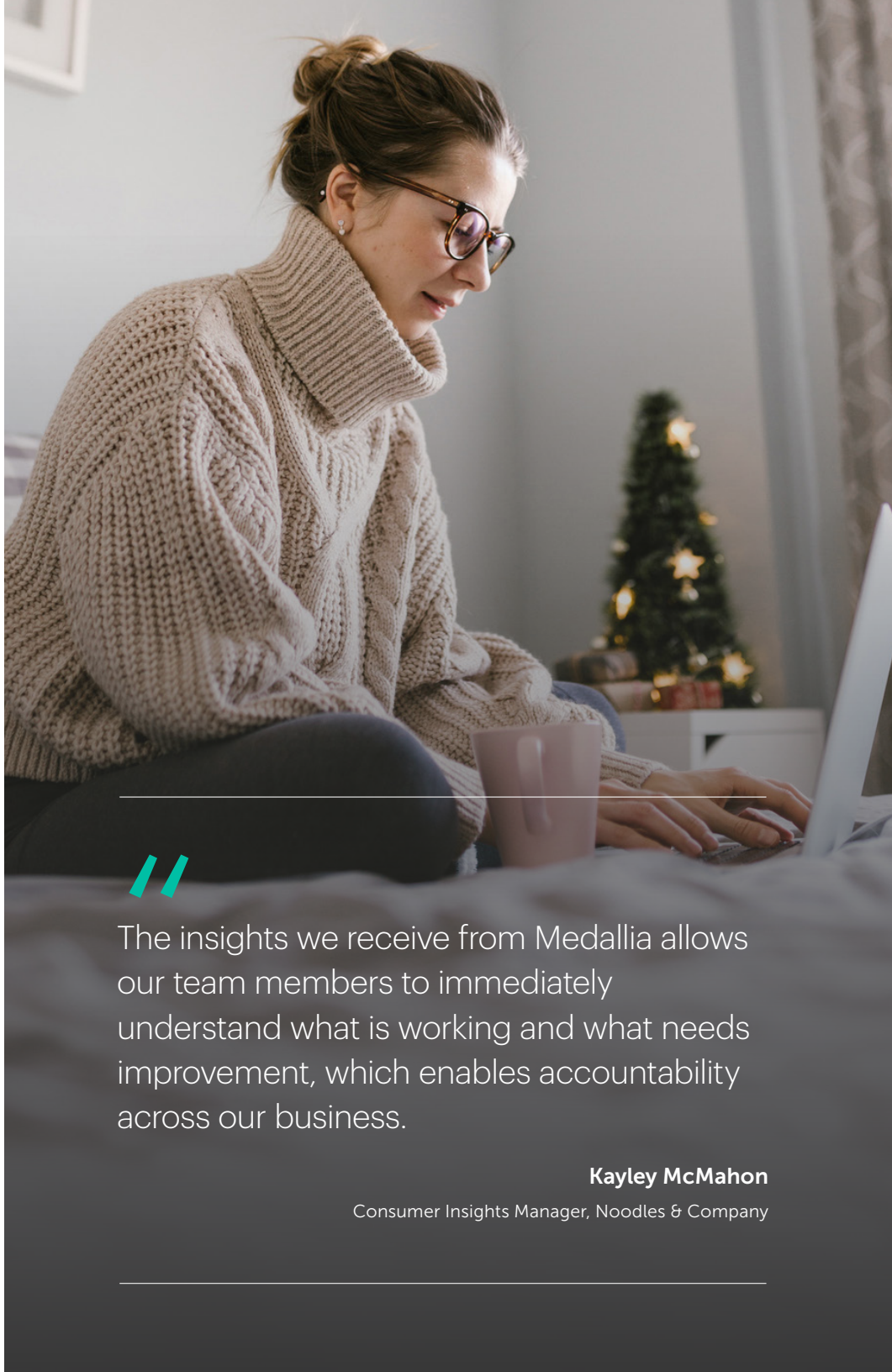
Tools to help you get started:

Quickstart Fulfillment enables faster fulfillment process changes by seeing customer text or video examples of where breakdowns occur.

Medallia Zingle delivers in-the-moment, personalized experiences and empowers frontline employees to respond quickly via two-way mobile SMS messaging.

Medallia LivingLens helps frontline teams empathize with consumers at scale through faster, richer video feedback. LivingLens capabilities are included in both the Quickstart Fulfillment and Quickstart Customer Micropulse solutions.

Medallia Conversations enables your customers to provide real-time feedback through chatbots, virtual assistants, SMS, and popular messaging apps.



"The insights we receive from Medallia allows our team members to immediately understand what is working and what needs improvement, which enables accountability across our business.

Kayley McMahon
Consumer Insights Manager, Noodles & Company

04 Make the contact center an epicenter for change

Current digital self-service tools are being tested by new demographics: 53% of shoppers reported trying a new shopping service for the first time this year.[7] A normal holiday season sees contact center calls spike up to 10x of average volumes.[8] This season, call center volumes have already reached all-time highs with no signs of slowing. To manage spikes of this magnitude, focus on uncovering the root cause of issues so your teams can deflect and better triage calls. To begin:

Listen to every inquiry.
Manually sampling calls will fail to give you the insights you need to quickly train seasonal staff or manage increasing customer dissatisfaction. You need to pay attention to every call, chat, and tweet to truly understand what is causing consumer unrest. Modern speech and text analytics technologies can help quickly uncover issues with order times, processing issues, inventory uncertainty, or employee soft skills by using powerful-AI to transcribe and analyze unstructured data from calls, chats, emails, and cases.

Turn calls into action.
Now that you've uncovered a gold mine of insights, make it easy for teams throughout the enterprise to use them to improve the customer experience. By parsing role-based feedback like improvements to digital self-service tools, or curbside pickup logistics, or confusing marketing messaging with AI-powered text analytics, your entire organization can take action on the consumer insights discovered in the call center.

53% of shoppers reported trying a new shopping service for the first time this year.

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Tools to help you get started:

Medallia Speech reveals powerful insights from voice interactions with speech-to-text processing and AI-powered acoustic emotional analysis.

Medallia Conversations enables your customers to provide real-time feedback through chatbots, virtual assistants, SMS, and popular messaging apps.

Text Analytics turns every word into insight and action by leveraging AI and machine learning to unlock the rich potential of unstructured data.

"

Using a speech analytics solution... to understand context and emotion at scale—[is] a critical differentiator when it comes to customer experience. This level of insight can help CX leaders understand what customers are struggling with and why, which is powerful when it comes to identifying and prioritizing improvement initiatives.

Faith Adams
Senior Analyst, Forrester

05 Share insights across the organization

By intentionally limiting consumers' normal behaviors at physical locations, social distancing protocols have accelerated every organization's omnichannel transformation. As stores merge with warehouses and websites, help your teams work together by providing a unified view of your customers. Share insights into how experiences in each channel impact one another. To ensure seamless omnichannel experiences:

Gather often to share insights.
This holiday, consumers will likely continue to share a wide range of feedback across different channels. Help each team focus on strategic solutions with real-time, role-based insights sent directly to their phones instead.

Spread some cheer.
Everyone is going to be working overtime this holiday season to ensure customers feel the holiday spirit. Spread some cheer internally by recognizing employees throughout the organization who stand out for their attention to customer experience.

Medallia Mobile puts personalized dashboards, alerts, and workflows in the palm of every employee's hand.

Medallia Voices lets you access a stream of customer feedback from your phone to easily recognize employees for their hard work.

"Associates in every location have the information they need at their fingertips, 24/7, in an easy-to-use app. That empowers them to take action to solve member problems, and we're seeing member satisfaction scores rise as a result.

Tracey Brown
Chief Experience Officer, SAM'S Club

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Conclusion

Make this holiday season a success by working smarter, not harder.

Ultimately, no one knows what to expect this year. But embracing an integrated omnichannel approach to customer experience now will pay off long after the holidays are over. Thanks to social distancing protocols and consumer anxieties, brands are finally forced to give people what they have wanted for years: personalized, seamless, omnichannel experiences. Luckily, modern experience management technology can help your teams achieve cross-functional efficiency quickly and easily. Start optimizing your key commerce channels today so you can give customers the best holiday experiences this year.

[1]https://www.mckinsey.com/business-functions/marketing-and-sales/solutions/periscope/our-insights/surveys/reinventing-retail#form
[2]https://public.tableau.com/profile/salesforceresearch#!/vizhome/SalesforceLeadingThroughChangeDashboard/LTCHome
[3]https://www.salesforce.com/blog/2020/07/covid19-holiday-readiness-retail-commerce.html
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[5]https://cdn2.hubspot.net/hubfs/393073/2020%20Consumer%20Report/MedZing2020-Future-Of-Commerce-Report-FNL.pdf
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