In Real Life

FINANCIAL SERVICES

Medallia

See how our partner Medallia tackles challenges in the financial services industry. From big-picture problems, to the specific needs of a bank CXO, Medallia has it covered.

Medallia enables financial services organizations to capture, analyze, and act on customer signals – direct feedback and interaction data from conversations in the branch and contact center to interactions across the web, mobile apps and social media – and transform experiences across the omnichannel financial journey.

salesforce appexchange

Here's how Medallia can help financial services firms like yours to grow revenue by winning and delighting customers.

Convert and retain more customers.

Proactively identify and engage with individuals most receptive to products and services.

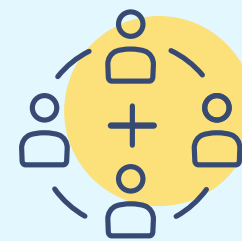## Improve digital customer experiences.

Quickly identify and fix sources of friction and costly channel switching with real-time analytics and closed-loop workflows.

Drive more cross selling and upselling.

Increase conversions during buying and account opening by acting on signals in the moment.

Aquire and retain top talent.

Recruit highly engaged employees and support their needs as they progress.

Keep reading to learn more about how Medallia helps a bank CXO retain customers and evolve their experiences as their banking needs change.

The Big Picture

Medallia enables you to deliver exceptional customer experiences that drive business outcomes.

Deepen customer relationships.

The Challenge: Banks need to convert and retain more customers to grow wallet share and assets under management (AUM).

The Solution: Medallia helps you identify and solve conversion problems and improve experiences that drive cross-sell and customer referrals.

Deliver excellent service.

The Challenge: Difficulty identifying and addressing pain points in the customer experience lifecycle can lead to dissatisfaction and callbacks.

The Solution: Medallia enables you to reinforce positive behaviors with real-time engagement and coach development areas at the frontline.

Deliver service excellence.

The Challenge: Difficulty providing consistently superior service experiences in contact center and branch interactions.

The Solution: Medallia up-levels your front line employee performance and job satisfaction through real-time engagement and coaching that leverages rep-specific client feedback
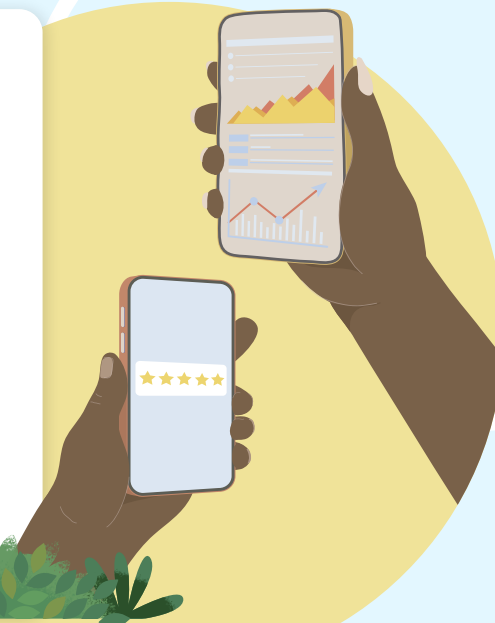
Stop employee churn.

The Challenge: High attrition and low morale rates lead to less experienced and enthusiastic employees interacting with customers.

The Solution: Medallia provides ongoing employee listening and analytics to sustain engagement throughout an employee's tenure, enabling efforts to improve their experience, development and performance.

The Close-up

See how a CXO uses Medallia to build trust and loyalty with world-class experience management for consumer banking and wealth management.

SALLY LAKE
CXO, Diamond Bank

Sally needs to make sure Diamond Bank delivers exceptional customer experiences at all times.

Her Goals:

- Ensure Diamond Bank is the one and only bank for its customers

- Upsell existing customers

- Gain new customers through referrals

- Provide all customers with a positive experience at every interaction

Her Challenges:

- Customers' expectations are rising for a wider array of services, and seamless, personalized omni-channel experiences

- It only takes one bad experience for a customer to move their banking services to competitors

- Customers are rapidly migrating to mobile app and online banking.

How Medallia Solves Sally's Challenges

Innovate from outside in.

Medallia allows Sally's team to combine omni-channel customer feedback and transaction data with AI-powered Text Analytics and powerful insights reporting to guide innovation and investment decisions.

Dial up digital banking.

Medallia Digital enables Sally's team to partner with Diamond Bank's digital teams to capture, analyze in real time, and take action in rapid cycles on direct digital customer feedback and 100% of digital interactions in real time.

Grow stronger relationships.

Medallia provides loan officers and relationship managers with dashboards and direct customer feedback to resolve customer issues and meet their needs with a rapid closed loop process that builds loyalty and lifetime customer value.

Learn more about Medallia