Lisa: Thank you for tuning in to the latest Qualtrics webinar, Designing a World-Class Digital CX Program. Before I introduce our speakers, I’d like to draw your attention to the Q&A portal on the right hand side of your screen. Feel free to submit questions at any time, and we'll get to as many as we can at the end of the presentation. Our presenters today are Juliana Holterhaus and Sachin Goregaoker.

Lisa: Juliana is a subject matter expert at Qualtrics and is currently working in the retail space, creating retail and digital solutions and customer experience. Juliana completed her Ph.D. in psychology and decision sciences at Columbia University, and prior to Qualtrics, worked in the mobile tech space as general manager of Luminous Global Market Research business.

Lisa: Sachin is product marketer at Qualtrics for digital solutions. Before working with us, he spent a number of years at Microsoft as an engineering manager focused on security solutions, and most recently led a team of project managers working in QuickBooks mobile payments at Intuit. Sachin holds an MBA from the Kellogg's School of Management at Northwestern University.

Lisa: Juliana and Sachin, we're looking forward to your presentation.

Juliana: All right great. Thanks so much, Lisa. So as discussed, today we will be talking you through designing a world class digital feedback program. First we'll spend some time sharing the Qualtrics point of view when it comes to digital customer experience. We'll then move on our prescriptive approach and maturity model, all of which leads into three[inaudible 00:01:26] themselves into the digital space.

Juliana: Next up, Sachin will walk you through a demonstration of the technology, and will wrap up with a customer story. Alright, so let's jump right in. I'm going to take a moment to consider your day, so each moment quickly becomes a memory, some more meaningful than others. These experiences are in actions with one another, with brands, with products and services, they impact our days in countless ways. So for today's constantly connected consumer, an engaged and meaningful experience is not only coveted, it is expected. And why is that? It's because a meaningful experience, one that's relevant
and emotionally salient, creates higher value and longer term customers. Meaningful experiences generate more referrals and reduce turn. It's human nature to come back for more when we feel engaged, when we're treated with respect, and seen as a person, rather than a data point. It all sounds really important right?

Juliana: The retail industry provides case in point for the importance for potential of optimizing the digital experience. Accord to the U.S. Department of Commerce, ecommerce sales in the U.S. totaled over $97 billion during Q4 in the year 2016. That presenting a 14% year over year growth. Now this growth might seem ominous for brick and mortar, however the thriving ecommerce market actually presents a very real opportunity to drive traffic to physical retail stores. In the moment research, loyalty programs and location specific discounts can help even traditional retailers drive digital value. Too many corporations, brands and employers fall short of providing a top notch experience for their target audience. When organizations don’t [inaudible 00:03:06] our type of experience management, they end up being reactive, and are forced to put out fires rather than have conversations and catch your insights that help the build the next big thing.

Juliana: Because it’s 2018, an increasing majority of these key experiences are digital. As our friends at Temkin describe, digital will become the loyalty backbone. As more customers interact with companies more frequently over digital channels, these interactions will become the foundation of their relationship with these trends. If organizations are unable to make an emotional connection online, then they risk diminishing customer loyalty. So clearly something that's really important to keep in mind here.

Juliana: And there are many other trends that speak to the importance of digital when it comes to getting the customer experience right. There’s the obvious prevalence of mobile, as 72% of U.S. mobile shoppers use their smart phone to inform a purchase decision, and that was a few years ago now. The numbers are no doubt much higher today. The[inaudible 00:04:04]a similar method about the impact of digital and in store purchases, and of course the importance of consistency across channels is called out by E-marketer.

Juliana: So how should business leaders get closer to their digital customers, and reveal those key moments of truth? Well there are seemingly endless streams of what, when, and where data that surrounds consumer decision making, we’re often left wondering about the why, behind the shopping cart abandonment late, or the how to go about fixing unexpected drop off when searching for an online discount code. This is where human feedback makes all the difference for companies that prioritize digital. Now, with all of this in mind, we're going to talk you through the Qualtrics Prescriptive approach and maturities model, and that it be a successfully implemented for an increasingly large list of our customers. Our goal is to really help you build, grow, and scale your digital feedback program to drive insights and actions to enhance the website and app experience to your customers.

Juliana: So, the first step in our prescriptive approach is known as track and diagnose. This phase is all about laying the foundation for actionable digital research. We most commonly
recommend and overall site or app experience survey, alongside always on persistent feedback. The purpose behind the overall site or app experience survey is to really understand key tracking metrics, such as goal attainment, likelihood to return, CSAT which is a very [inaudible 00:05:26] in the digital space, and NPS. From there you will be able to identify diagnostic instruments, such as key drivers and pain points. Now, as far as deployment goes, we would recommend making our quest for feedback upon exit of the site, and then the persistent can provide additional distinct information with a quick hit on specific pages that have a non pain point. Perhaps from existing operational data, or on a page where are some user call to action.

Juliana: The next phase of the prescriptive approach is around that of the journey deep dives. So, let’s jump into that. Here the goal is to really gain actionable insight in to how you can fix problematic journeys. It's also important to keep a pulse on positive journeys, so as to ensure that they continue to stay successful. Example of journey deep dives include better understanding shopping cart abandonment, or working to improve the account management process for your customers. Those are just a few to give you something to think about. Now, when it comes to methodology, we always recommend omni channel measurement, an act is targeted in journey [inaudible 00:06:29] and logic that will prevent repeated display. That's really something that's essential to keep the genuine customer experience top of mind, and not interfere in opportune moments, and [inaudible 00:06:42], it’s really important to be precise with these requests for feedback, three to five questions often what we see as best, and you want to engage with your audience in moments that matter to them. Area where it will resonate, in terms of feedback request.

Juliana: Finally, it’s key that every interaction is an accurate reflection of your brand, from language to look and feel of the request for feedback, and this is also very easy to do within the Qualtrics platform. So that wraps up the journey deep dive phase of our research, and finally some of our customers will take it one step further with digital closed loop management. This is where ticket management and real time recording are key to truly empowering the genuine voice of the customer. So now that we've described the digital CX prescriptive approach within the context of the maturity model, I'm going to turn it over to Sachin.

Sachin: Thanks Julie. So our goal at Qualtrics is to help our customers move beyond traditional surveys to combine human feedback, or experienced data, with operational data. We have identified three pillars of CX for customer experience that have really come to life in the digital space.

Sachin: The first pillar is to be personal. Always prioritize the human on the other side of the data point. Think about what matters to your customer, and capitalize on that. The world will continue to evolve, but digital voices of customers and prospects will only become louder and more pervasive. Think of the digital experience as the primary case, but first, an integral touch point that will ultimately make or break a product or a brand. Engage in conversations that show that you care, versus just a one way feedback capture. Integrate your brands experience and messaging into your customers lives, in
am meaningful and cohesive way. This is really what phosphors a lasting relationship with your customers.

Sachin: The second pillar is about removing roadblocks to insight and being predictive. Operational experience data can combine to give you a holistic view of site and app visitors. Such a comprehensive view enables predictive capabilities. We have an example in the insurance space, where the client had their digital analytics, or O data, telling them that customers were just sitting on the quote page and not moving forward. This O data told them that they were likely to abandon, however it did not tell them why they were sitting on the quote page. This is where the X data comes in, where by it makes sense to engage with customers in this key moment of truth with the customer, to understand what is happening, and why they are behaving the way they are. Qualtrics provides integrations with major analytics providers, such as Adobe Analytics, to enable clients to get the full picture of their digital visitors.

Sachin: The third pillar is about activating your organization. Being embedded. Activation is about being embedded and you need a platform that can guide the organization towards action to deliver a stellar digital customer experience. Organizations are almost always enabled by operational crowds, marketing crowds. Therefore, you need a platform that was designed to become embedded within your company. Qualtrics is the experience management crowd to complement operational crowds.

Sachin: Our goal is to ensure insights are delivered via our real time dashboards. You can see a few of the metrics that Julie talked about earlier, that highlight strong digital measures, such as CSAT, likelihood to return, and visitor intent. We also enable relevant stakeholders to take immediate action through ticketing, alerting, and action planning, all with a goal of make sure your organization is activated to on the insights that you collect.

Sachin: Now let’s take a few moments to learn the capabilities, the Qualtrics website feedback solution. I’ll demo this on a live site that we have the showcases digital intercept scenarios, and the online retail context. This will illustrate how you can collect experienced data in a digital environment. The first thing you’ll see is our overall site experience study. Talking to individuals when they’re in the process of leaving the site, so you can gather their overall experience, is an important part of a digital feedback program. You can ask your visitors to take the survey when they first visit your site, and once they are done browsing, the survey will be presented. So in this case, I’m going to go close this tab as if I’m done browsing, and you’ll see that the survey will show up. And this is a survey where they can provide feedback on the overall experience since they just gone done browsing your website.

Sachin: Another example, is the ability to collect persistent feedback. This isn’t always our way to talk to customers, when they can often share what is on their mind. Quite often it is a powerful mechanism for bug reporting, and understanding key pain areas. You can also provide the ability to capture a screenshot, once you have the screenshot, you can
provide levels of customizations so customers can, either highlight specific areas of the screen where they want to show problems, or even block out sensitive information, such as account information.

Sachin: Now let's talk about journey specific research. A digital journey,[inaudible 00:12:49], is made up of a number of journeys. Perhaps your digital visitors are there to get support, to learn something, or to browse through products. You may want to be able to understand, in journey, what the experience is like. You have the ability to target right segments of visitors, in the right moments, with the right questions that you want answers to. An example of a creative here, is as I browse on this site, and as I'm near the bottom of the site, to simulate I'm not finding what I see, you can see we can intercept customers with this creative. Now while one is promotional in nature, and you can totally do that, you can also ask questions about that particular page, and the contents of that page.

Sachin: Most sites also have very important conversion funnels, things that you’re trying to drive your visitors to do. In retail, the purchase funnel is critical. As with any conversion funnel there are various drop off points. On this check out page, you can see we can intercept users as their cursor leaves the browser port. Here you can better understand why they're leaving, how they will rate your site, and you can also perform recovery strategies such as offering promotion discounts like free shipping, as necessary.

Sachin: It can also be valuable to engage with individuals who have just completed a purchase, to better understand the experience with that process. Doing post transaction research can be very valuable. Here you see one of our custom HTML creative that is dropped on to the page. You can control who to show this creative to, and then ask questions pertaining to that specific transaction. These are a few examples of journey specific research, as well as the ability to create leading indicators of pain points in the site experience.

Sachin: Now that we've seen the product in action, let's talk about a specific customer scenario where they were able to bring the power of the Qualtrics experience managing platform, to close experience gaps in the digital space. Healthcare.gov was launched in 2013, in connection with the Affordable Care Act. It is the main portal for Americans searching for, and enrolling in health insurance plans, in each state served by the Federal Exchange. The site faced a number of challenges, including how in increase healthcare registration, and improving site user satisfaction, and site conversion. Additionally, they were looking to improve the digital experience to improve response times, and digital engagement.

Sachin: Healthcare.gov leveraged Qualtrics to help drive step function improvements in their digital experience. First, they focused on holistic measurement, where Qualtrics was used to optimize every aspect of the site experience, from registration to selection of plans. Additionally, they collected feedback from millions of individuals, using targeted surveys. Finally, the insights from the feedback were made easily accessible, and digestible, for the [inaudible 00:16:22] in a real time, to help them improve aspects of
navigation and messaging. As you can see from this slide here, this program drove significant benefits, in terms of improvements and response times, conversion rates, as well as engagement.

Sachin: That brings us to the end of our webinar content today, we would love for you to stay engaged with us. We have our website, which is www.qualtrix.com/digital where you will find additional white papers, and customer success stories. We also have an upcoming webinar on digital experience measurement for mobile apps, that will talk very specifically about the strategies you can deploy to measure the customer experience within your native mobile apps. Finally, stay engaged with us by talking to our sales team who would be happy to set up a demo, or set you up with experts.

Sachin: Now we have a few minutes for questions about your digital experience, let me hand it off to Liz.

Liz: Thank you. Okay, so we have got a few questions that came in, our first question is, "what response rate can we expect with digital intercept based surveys, and how to avoid over surveying customers on digital properties"?

Juliana: I'm happy to jump in on that one. So, first of all, opt in rates can really vary pretty widely, variables such as branding, or brand divinity, in contact versus embedded, even versus a link for quest for feedback, the verbiage of invitation, they can all dramatically impact opt in rates, and that's why it's so important to consider your customer, and who's going to be interacting with that specific request.

Juliana: I would that the most important element of an effective digital measurement program, is to go with the best option right out of the gate, and then from there you can just rapidly iterate until you find the perfect fit. There are different recommendations that we would have and that we're able to make. For active solicitation, and terms of like active feedback requests, we would use popovers, sliders, and sometimes in fill bars. We usually plan for those, we see about a 2-4% opt in rate. Now for passive solicitation, where if you could persist on, kind of like feedback link, the opt in rate is quite a bit lower, less than 1%, and its worth noting in those specific instances we're often seeing negative feedback coming in, because it's kind of an always on there, people will come and provide, it's more likely they will complain about something. Where as an active request, that tends to bring in a more representative sample, a representative feedback.

But, of course all of this in terms of response rates is contingent upon each unique audience, so we see these numbers as a helpful guide.

Juliana: It's also worth noting that completion rates can really vary, very widely based on the methodology. So, if you're using an exit entry survey, that can take multiple steps. Best opt in will have a lower completion rate. Then our website, sorry, our website feedback solution provides out of the box solution that can avoid over surveying customers,[inaudible 00:19:46] like a prevent repeated display role just to make sure that the visitor is not going to see another [inaudible 00:19:50] for a specified period of time. Again, that goes back to one of our key principles as always keeping your visitor,
your customer's experience top of mind. It's very unlikely they are coming to your site to provide feedback or to take a survey, so you just always want to keep their true visitor intent top of mind.

Lisa: Perfect thank you. Another question I'm sure a few people are wondering. "What are the pros and cons of an active approach, as well as a passive approach, for feedback requests"?

Sachin: Thanks Lisa I'm happy to take that. This is really dependent on your specific situation. As I showed in the demo, active surveys are really good to get the visitors attention, and are very helpful in post transaction context. For example, a popover that's shown after a person makes a bill payment for instance.

Sachin: However, active surveys are a little bit more interruptive to the user experience, and you have to be very careful to use them sparingly, and in the relevant context of what the user did so it doesn't feel like a arbitrary pop up that shows up to interrupt the user.

Sachin: On the other hand, passive approaches, such as feedback tabs, are helpful as an always on and non intrusive avenue to solicit feedback. But as Julie mentioned, the opt in rate is much lower because it's a static link that is kind of hovering on the page, and not everyone is going to click on it. The sample isn't representative because it tends to attract the people who have strong opinions and generally negative opinions about their experience. However, the feedback what we've seen with customers can be very very valuable to isolate issues and bugs that are going on with their website, so just bear in mind the methodology has a huge impact on the actual data you get. So, as long as you go in with eyes wide open, The choice proportionally depends on your use[inaudible 00:21:48] of your context.

Lisa: Thank you very much for that. We have time for one more question today, and that question is, "What kind of operation metrics would you recommend linking to experienced metrics"?

Juliana: That's a great question, and I love to hear clients thinking about that sort of thought process, or having that sort of thought process. So, we really believe that operational data, or O data, will tell you what happens, where as the experienced data, or X data as we say at Qualtrics, will say why it happens.

Juliana: So, as a result of the X and O data combination, it's really critical to get at a holistic picture of your digital visitor. You know, those different data steams will provide this truly genuine picture of what's going on in that space, So a good example, often times we'll see customers use metrics such as page name, URL name, time on site, maybe browser type, mobile versus web, in addition to data that's specific to their industry. So, maybe a high value client,[inaudible 00:22:55] financial services, or perhaps something around cart abandonment rates if you're looking in a retail space. So, care should really be taken to link the appropriate operational metrics that can start to help you
understand the broader context behind the user’s survey response. So, it’s a great question, absolutely the right way to be thinking about this.

Lisa: Well perfect, thank you so much, both of you for answering the questions and for being with us today, and thank you to all of our listeners for tuning in as well. If you have any other questions please provide them in the Q and A box on the side of the portal, and we will provide an answer to [inaudible 00:23:35], and [inaudible 00:23:38] will also be made available on demand. Thank you very much.