How will we spend our 90-minutes together

1	Welcome / Kickoff	5 mins
2	Art & Science of Storytelling - Presentation	20 mins
3	Breakout into Dolphin Tanks	30 mins
4	Regroup and Share	30 mins
5	Wrap-up	5 mins

Medallia

Medallia named the leader in The Forrester Wave™: Customer Feedback Management

"Medallia breaks away from the competition with depth and breadth of offering. Medallia supports more than 2,500 enterprise and midmarket CFM customers around the world with a holistic approach grounded in its vision of helping organizations put CX at the center of operations."
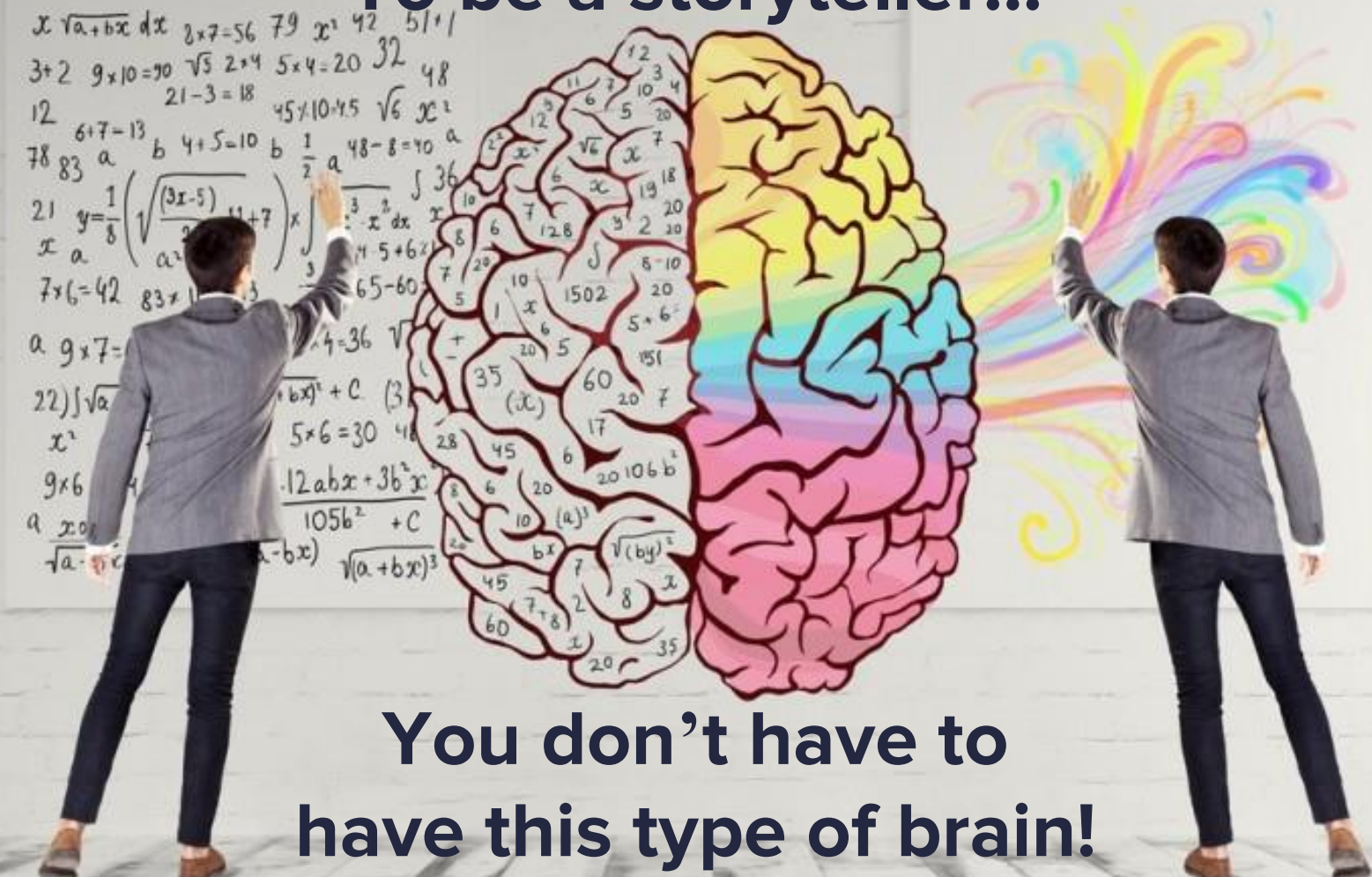
Key facts:

- Only 20% of the data Medallia analyzes is survey data.
- Text analytics and AI is transforming how businesses get to actionable insights.
- 47% of VoC and CX measurement program leaders rate the maturity of their program as low or very low.

THE FORRESTER WAVE™
Customer Feedback Management
Q1 2023

Challengers | Contenders | Strong Performers | Leaders

Stronger current offering

- Medallia
- Qualtrics
- InMoment
- Concentrix
- NICE
- PG Forsta
- SMG
- Verint
- Alida

Weaker current offering

Weaker strategy → Stronger strategy

Market presence

Medallia

½

**Human conversations
are stories...**

To be a storyteller...

You don't have to
have this type of brain!

Collaboration

Why use storytelling?

- Stories **sell**
- Stories provide **relevance**
- Stories set **context**
- Stories create purpose and **drive action**

Storytelling can help:

- Companies gain a competitive advantage

- Drive customer experience into a business

- Support change management initiatives

- Grow your career and showcase your skills

4 Steps to building your story

What's the point?

Try the 'Coffee' bar test!

2. Write your brief

Some key things to consider

- **Who's your audience?**

  - Remember: Get specific. While you may eventually want to share your story with the whole world, at this stage you need a targeted audience. You can always adapt to different audiences later.

- **What does your audience care about?**

  - What's the underlying human need in the audience that might move them to action? Consider their emotional needs and pain points.

- **What are you trying to achieve?**

  - Identify what you're trying to unlock with your story and what you want people to do.

3. Identify your ONE idea

Some key things to consider

- **What's the singular focus of your story — the idea you want to convey?**

- **What do you want your audience to remember?**

- **What do you want them to feel?**

- **If you deliver your story to different audiences, your idea may have numerous offshoots and variations within ONE central story.**

4. Reflect on the medium

Conventional vs. Non-conventional

How does your audience prefer to communicate?

Conversation   **Video**   **PowerPoint**   **Video call**   **Mobile**   **Email**
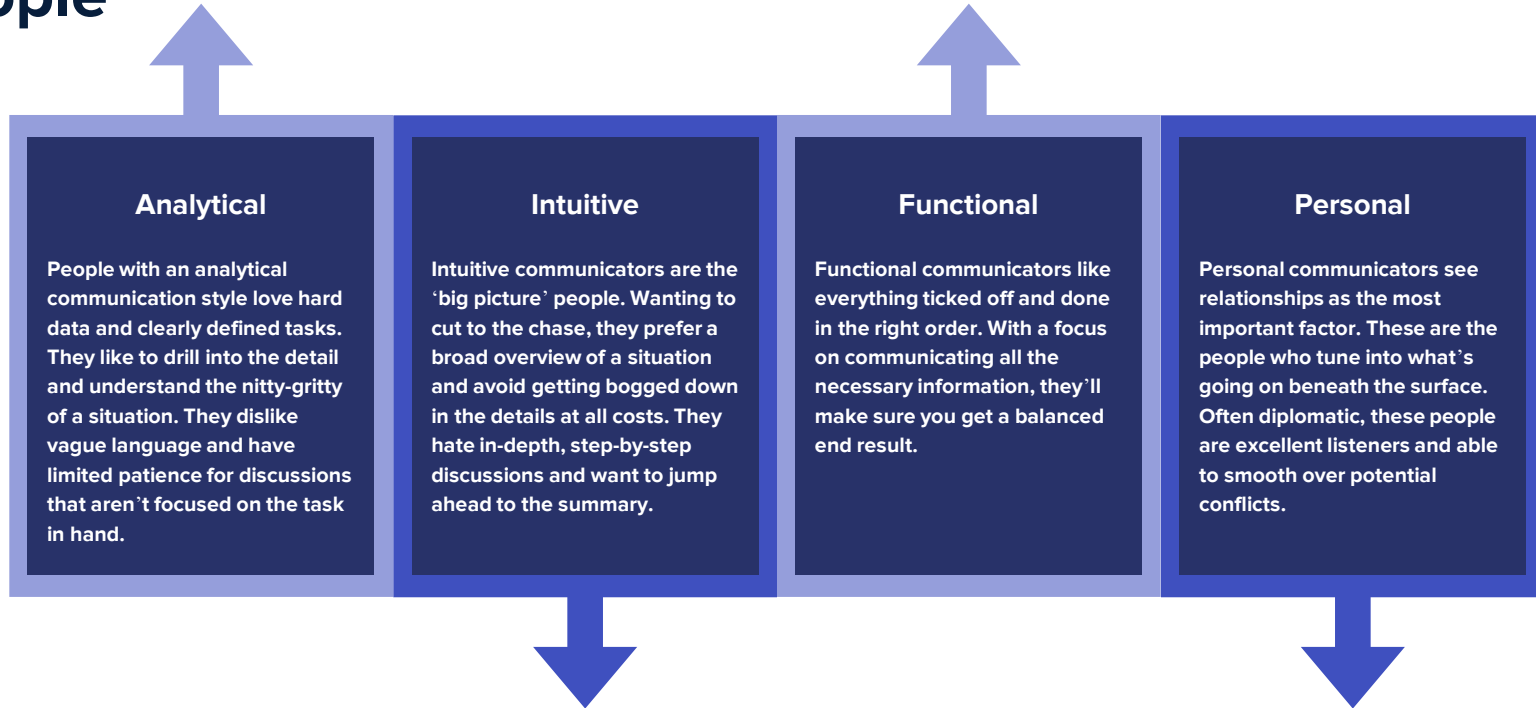
Medallia
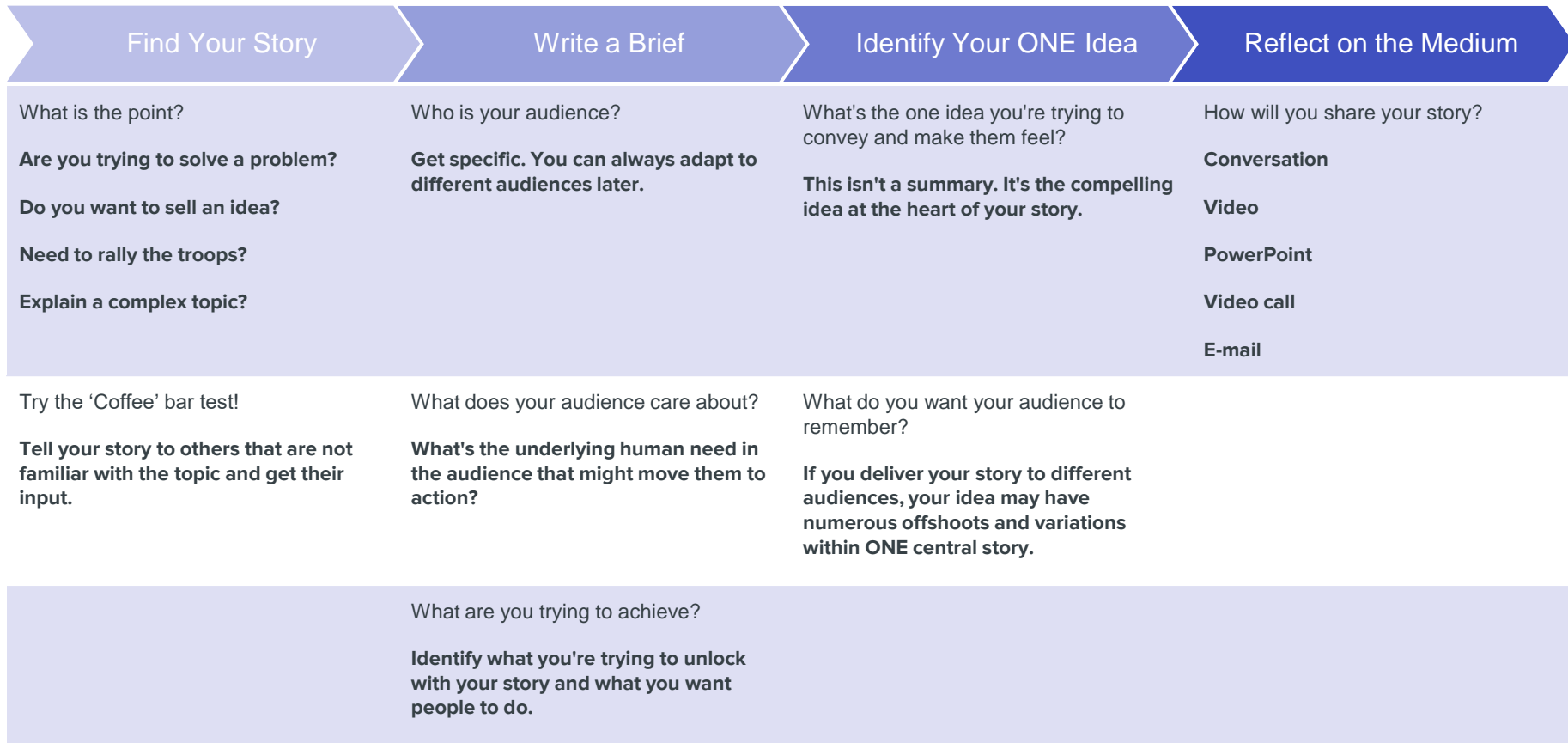
**REMEMBER:
This is about
telling your
stories to
others.**

Use different communication styles to connect with people

Analytical

People with an analytical communication style love hard data and clearly defined tasks. They like to drill into the detail and understand the nitty-gritty of a situation. They dislike vague language and have limited patience for discussions that aren't focused on the task in hand.

Intuitive

Intuitive communicators are the 'big picture' people. Wanting to cut to the chase, they prefer a broad overview of a situation and avoid getting bogged down in the details at all costs. They hate in-depth, step-by-step discussions and want to jump ahead to the summary.

Functional

Functional communicators like everything ticked off and done in the right order. With a focus on communicating all the necessary information, they'll make sure you get a balanced end result.

Personal

Personal communicators see relationships as the most important factor. These are the people who tune into what's going on beneath the surface. Often diplomatic, these people are excellent listeners and able to smooth over potential conflicts.

Medallia

Storytelling: Steps to building an impactful story

Find Your Story	Write a Brief	Identify Your ONE Idea	Reflect on the Medium
What is the point?	Who is your audience?	What's the one idea you're trying to convey and make them feel?	How will you share your story?
Are you trying to solve a problem?	**Get specific. You can always adapt to different audiences later.**	**This isn't a summary. It's the compelling idea at the heart of your story.**	**Conversation**
Do you want to sell an idea?			**Video**
Need to rally the troops?			**PowerPoint**
Explain a complex topic?			**Video call**
			E-mail
Try the 'Coffee' bar test!	What does your audience care about?	What do you want your audience to remember?	
Tell your story to others that are not familiar with the topic and get their input.	**What's the underlying human need in the audience that might move them to action?**	**If you deliver your story to different audiences, your idea may have numerous offshoots and variations within ONE central story.**	
	What are you trying to achieve?		
	Identify what you're trying to unlock with your story and what you want people to do.		

Big story example

Objective:

Get funding for our marketing automation efforts and platform.

What would you do?

SAY HELLO TO *Rachel*

- Late-twenties and single

- Seven years experience in the advertising industry

- Has a basic financial portfolio — checking, savings, 401K and a small money market

Social excitement

Rachel is moving on up. She just got a #newjob in her favorite city - Denver. She hops on Facebook to shout about the great the news.

Rachel
3 hrs

So excited! Just took a #newjob with a fabulous agency in #Denver. Sad to leave Indianapolis, but mountains here I come!

2 Likes

👍 Like   💬 Comment

Generic Company
SPONSORED

Check your inbox for a packet of recommendations and instructions. Thanks.

✓

Visit Generic Retire

2 Likes

👍 Like   💬 Comment   ↗ Share

Personalized email and click-through pages

Immediately following her form submission, Rachel gets a welcome email with her content pack as well as two recommended agents to assist her. Post-click, she arrives on the Generic-branded community pages containing guiding information about a 401K strategy.
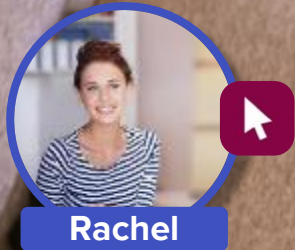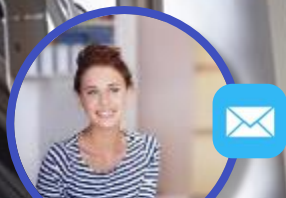

Rachel
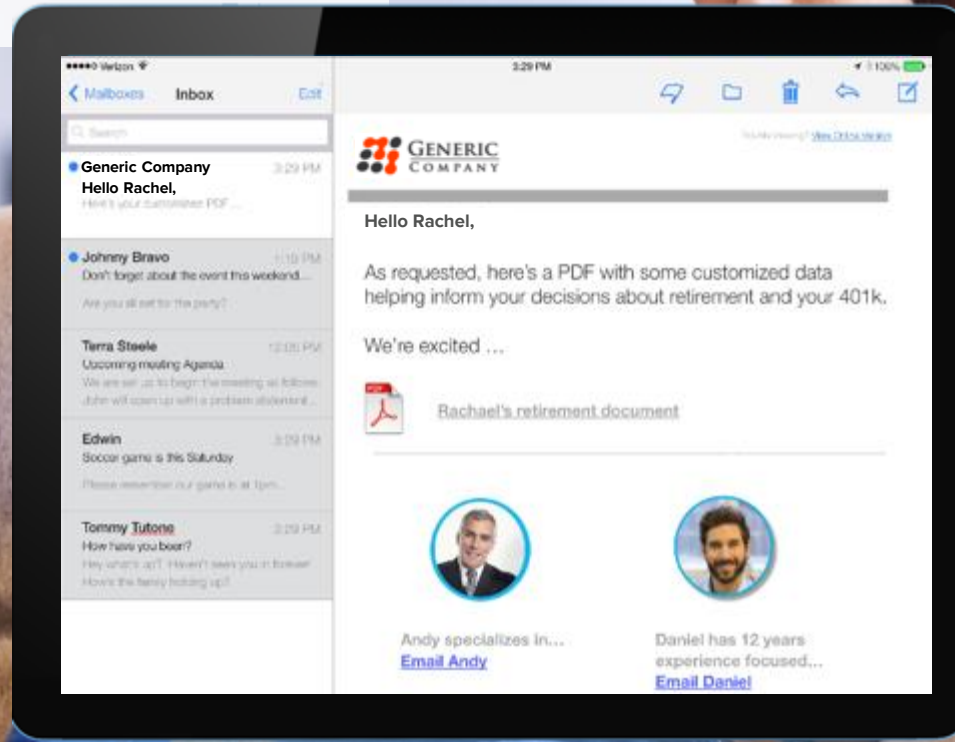
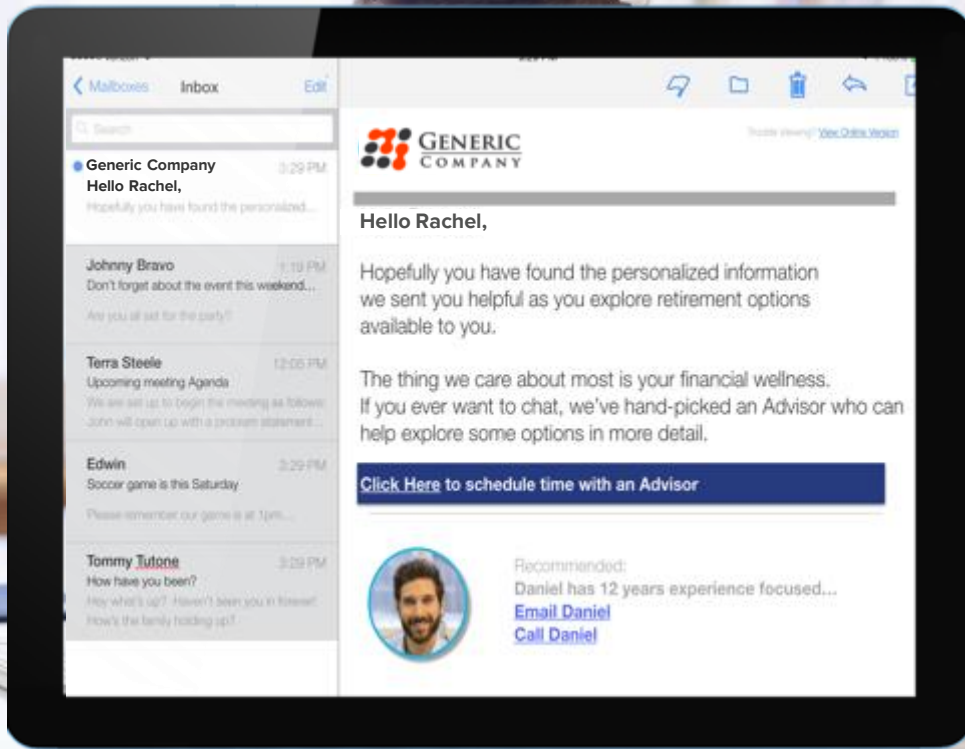
Marketing Automation Capabilities

Ad Studio
Personalized email
Cloud pages
Communities
Predictive Intelligence

Rachel was busy with her move

Her 401k was the last thing on her mind. Housing, furniture and making her cat Whiskers comfortable in their new home was key. An email reminder brings her back into the moment of evaluation.

Rachel

With a little more time on her hands…

Rachel starts looking into rollover options for her 401k. She gave the emails and content a cursory glance, but now is serious and wants to evaluate options and decide. Surprisingly, Generic Company results keeps showing up…

Rachel

Google

Best 401k funds for rollover

Retirement Savings Rollovers | Generic Company

Rollover multiple retirement savings accounts with the Generic Company Retirement

Rollover IRA | Generic Company Retirement

Apply online to roll over your retirement savings and consolidate multiple accounts without tax penalty with the Generic Company Retirement.

Marketing Automation Capabilities

Ad Studio
Personalized email
Cloud pages
Communities
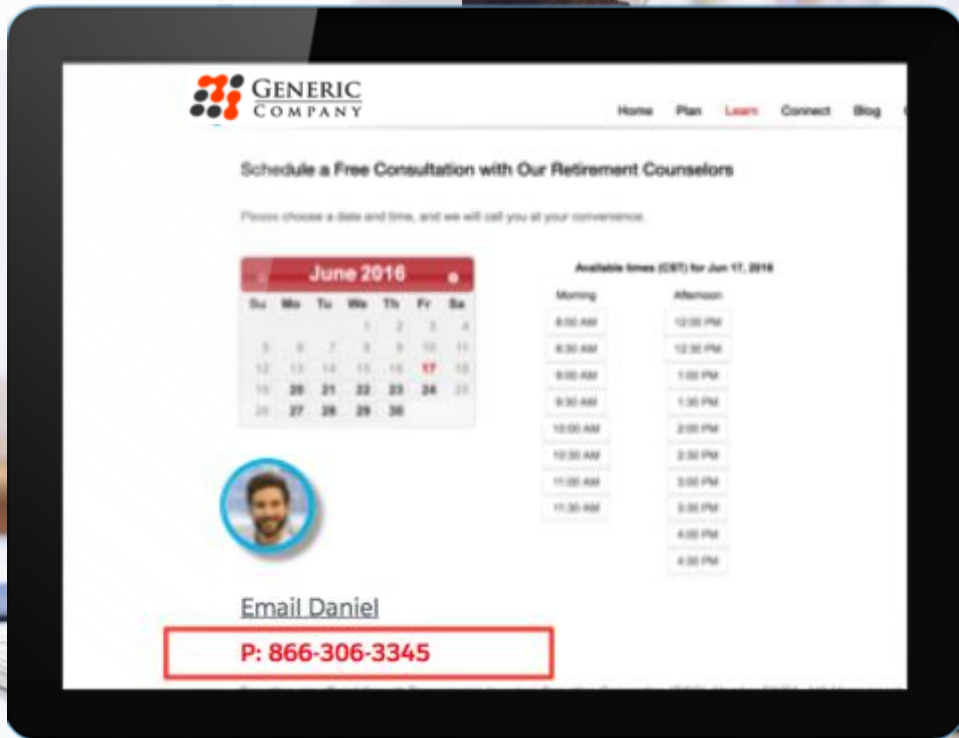Predictive Intelligence
Preference center
Social Studio

Rachel's ready to engage

She's still not sure but wants to speak with Daniel. Going online to his profile and calendar, she opts to simply call him rather than schedule online. The number she calls is unique to Daniel and tracked for attribution purposes to the marketing effort.

Daniel

Marketing Automation Capabilities

Ad Studio
Personalized email
Cloud pages
Communities
Predictive Intelligence
Preference center
Social Studio
Call attribution
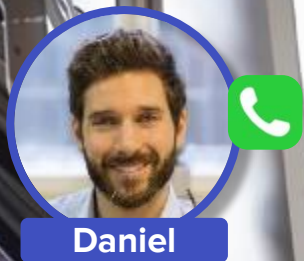
GENERIC COMPANY

Home   Plan   Learn   Connect   Blog

Schedule a Free Consultation with Our Retirement Counselors

Please choose a date and time, and we will call you at your convenience.

June 2016

Su Mo Tu We Th Fr Sa

Available times (CST) for Jun 17, 2016

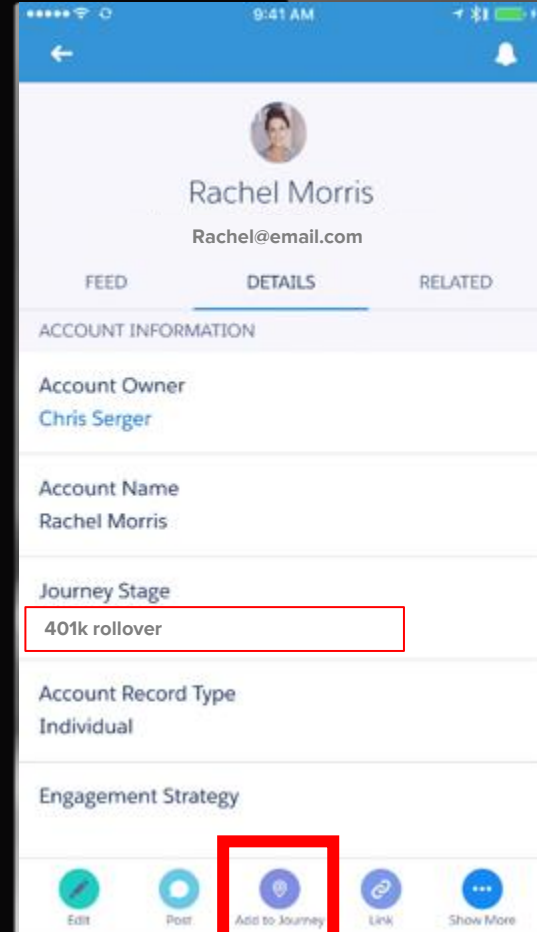Morning   Afternoon

Email Daniel

P: 866-306-3345

On the call, the journey begins

Daniel and Rachel hit it off and she decides to move forward with the rollover. With one click, Daniel is able to add Rachel to the rollover journey, setting off a series of events to inform all parties at every step of the process.
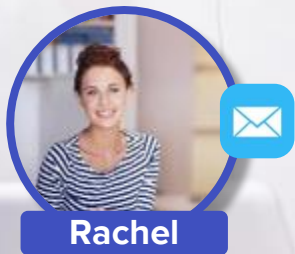
Rachel

Marketing Automation Capabilities

Ad Studio
Personalized email
Cloud pages
Communities
Predictive Intelligence
Preference center
Social Studio
Call attribution
Salesforce1
One-click Journeys (CRM)

Rachel's rollover messaging journey

Over the following days, Rachel receives several informative, responsive and personalised emails, helping her track the status of the rollover with tasks to complete, as necessary.

Rachel

GENERIC
COMPANY

Congrat...
Your roll...
initiated...
tracked...
through...

Trac...

GENE
COMP

Your pa...

Click here to log...
execute digitally...
online using Do...

Sign...

Download...

GENERIC
COMPANY

Almost done getting your money invested!

A check has been issued to you

Last step Rachel.

Your previous provider has issued a check payable to Generic Company as instructed. When you receive it, either mail it or take a picture and send directly to us.

Learn more

Marketing Automation Capabilities

Ad Studio
Personalized email
Cloud pages
Communities
Predictive Intelligence
Preference center
Social Studio
Call attribution
Salesforce1
One-click Journeys
Journeys

Closing the rollover journey

Once the rollover is complete, Rachel is presented a survey and is removed automatically from the journey. Her behavior and profile will dictate additional journeys she will be a part of moving forward for engagement and cross-sell opportunities.

Rachel

Hi Rachel. We're excited to welcome you to Generic. Would you mind telling us about your experience? Reply Y to continue and N to stop.

Y

On a scale of 1-5 how would you rate your overall experience with Generic Company Retirement?
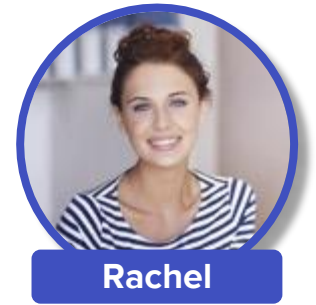
5
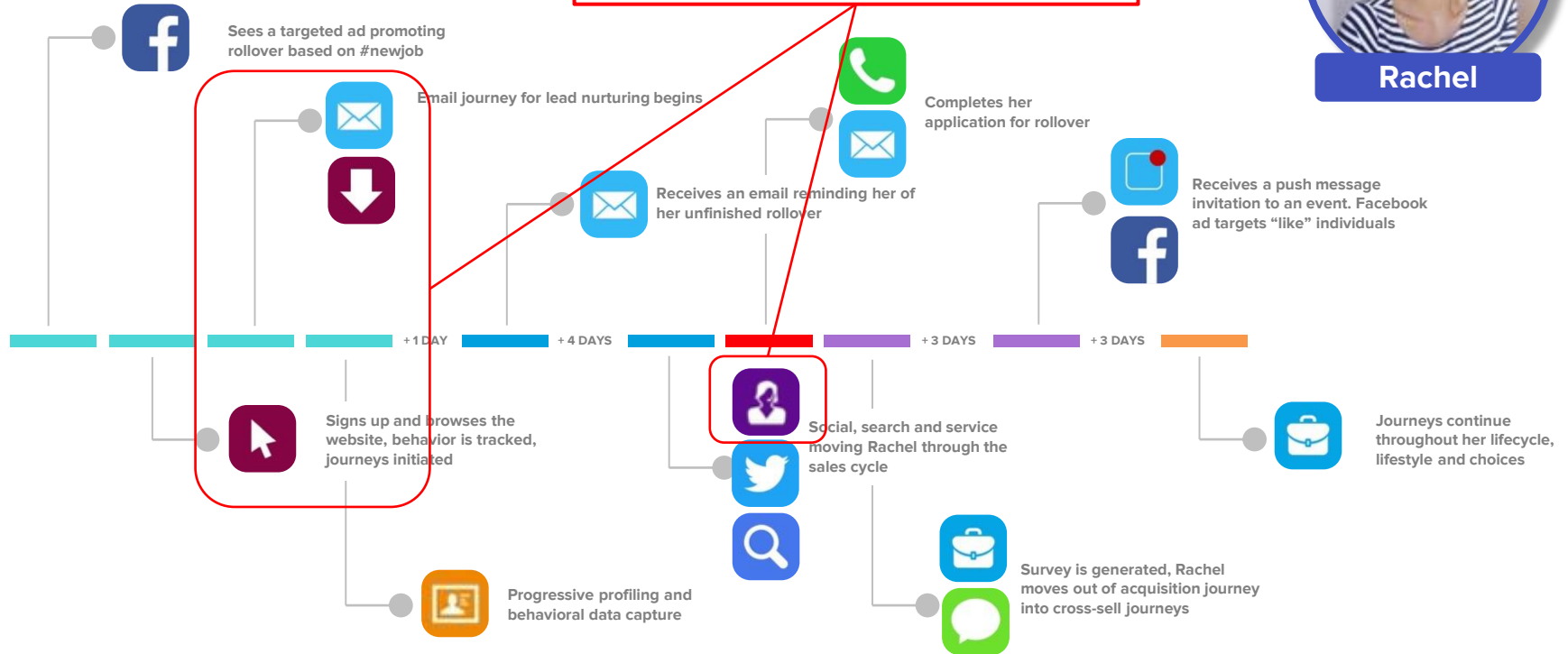
Marketing Automation Capabilities

Ad Studio
Personalized email
Cloud pages
Communities
Predictive Intelligence
Preference center
Social Studio
Call attribution
Salesforce1
One-click Journeys
Journeys
Lead management

Rachel's Journey

What we can deliver today.

Rachel

Sees a targeted ad promoting rollover based on #newjob

Email journey for lead nurturing begins

Completes her application for rollover

Receives an email reminding her of her unfinished rollover

Receives a push message invitation to an event. Facebook ad targets "like" individuals

+ 1 DAY   + 4 DAYS   + 3 DAYS   + 3 DAYS

Signs up and browses the website, behavior is tracked, journeys initiated

Social, search and service moving Rachel through the sales cycle

Journeys continue throughout her lifecycle, lifestyle and choices

Progressive profiling and behavioral data capture

Survey is generated, Rachel moves out of acquisition journey into cross-sell journeys

AWARENESS   ACQUISITION   ONBOARD   ENGAGEMENT   ADVOCACY   CUSTOMER ACTIONS (CLICKS)

How can we deliver this experience together?

Short story example

Applying CX Discipline

Case Study: Paperless Sales Transformation + Business Results

Recognize customer frustration from insights: Time to sign 10-11 documents to purchase financial product with company. If paperwork error occurs costly for business and pain point for customers.

Identify business problem: Resources to process paperwork, bad data capture, wasting distribution time with operations.

Set business goal: Create a paperless experience to ease friction for our customers and operation team.

Connect customer journey and business process (Service Blueprint): Deepen understanding the customer, sales and operations experience.

Design new experience and business model: Coordinate people, process and technology to deliver new experience.

Results Achieved: Customer effort score improved by 46%, Sales increased by 7%, Operations reduced resources and saved $500k in first year.

Understanding → Design → Build → Implement → Run → Learn

Did you see how the storytelling framework worked?

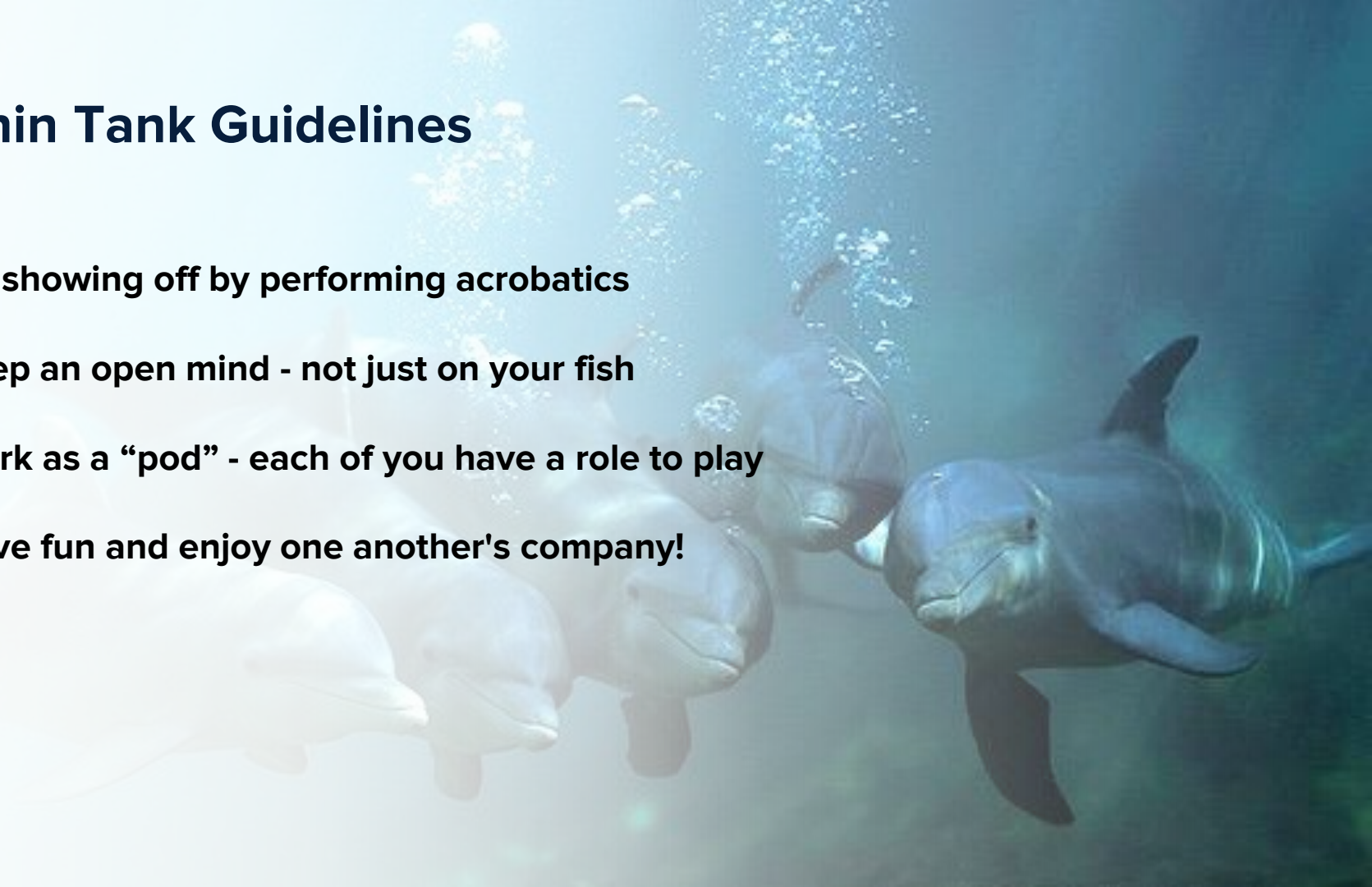What worked well?

What could be improved?

Breakouts into...
Dolphin Tanks!

Dolphin Tank Guidelines

- **No showing off by performing acrobatics**

- **Keep an open mind - not just on your fish**

- **Work as a "pod" - each of you have a role to play**

- **Have fun and enjoy one another's company!**

Medallia

Dolphin Tanks (Breakout Room) Objectives

Share Story Ideas

Select one story to focus on as a group for the next part.

Improve a Story

Using the storytelling framework as a guide, as a pod help the storyteller improve or reframe their story by asking questions or making suggestions.

Extra credit!

If you have time to help more than one story, then you're an overachiever! We'd send you a cookie, but this is all virtual. 🍪

Storytelling canvas

Find your story

What's the story about?

Share…

Your ONE idea

What do you want to achieve with this story?

Share…

Audience

Who is this story for?

Share…

Context

What should be set up or explained?

Share…

Checking idea criteria

Does your idea capture the problem to solve?
Is it compelling for your audience?
Is it clear and concise?

Share…

Empathize

What does your audience cares about and why?
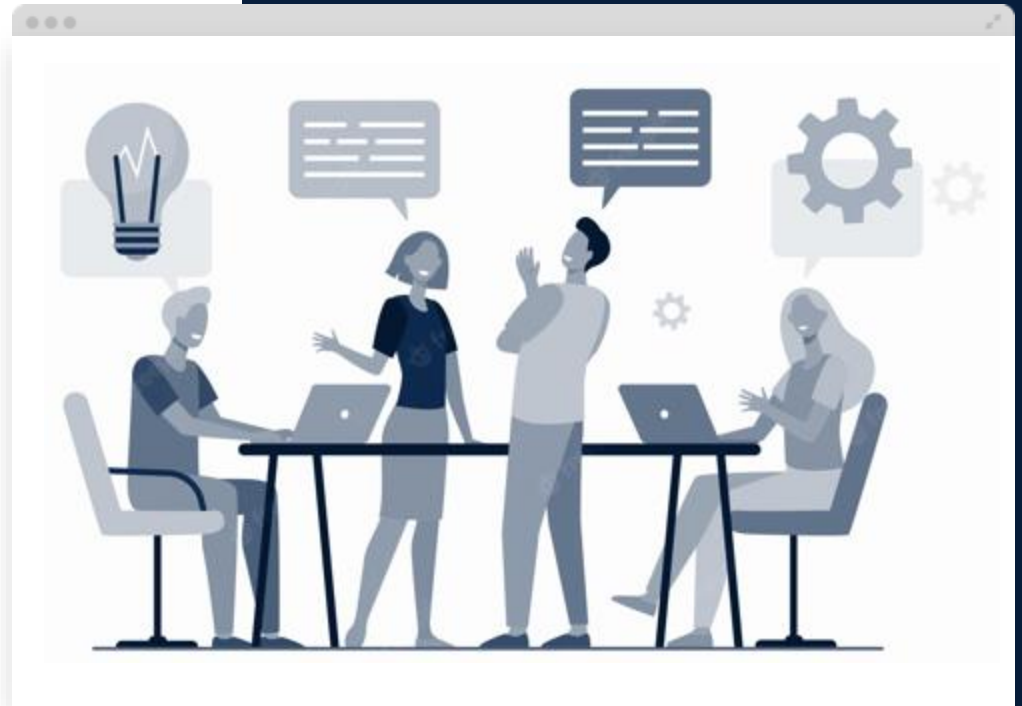
Share…

Choose a medium
How will you share your story?

Consider this before you present:
Are you the right messenger?

What did you learn from collaborating on a story together?

At least one person from each group share

Medallia

Thank you all!