



# Coffee & Conversation: Stay Ahead of the Competition with Ease

How Agile Research Can Help

September 19, 2024



# AGENDA

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**1 WHY MARKET RESEARCH MATTERS IN CX**

**2 WHAT IS AGILE RESEARCH?**

**3 KEY SELF-SERVICE FEATURES**

**4 DEMO**

**5 NEXT STEPS**

# SPEAKER

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**Henry Bricker**  
Principal Product Manager  
Medallia

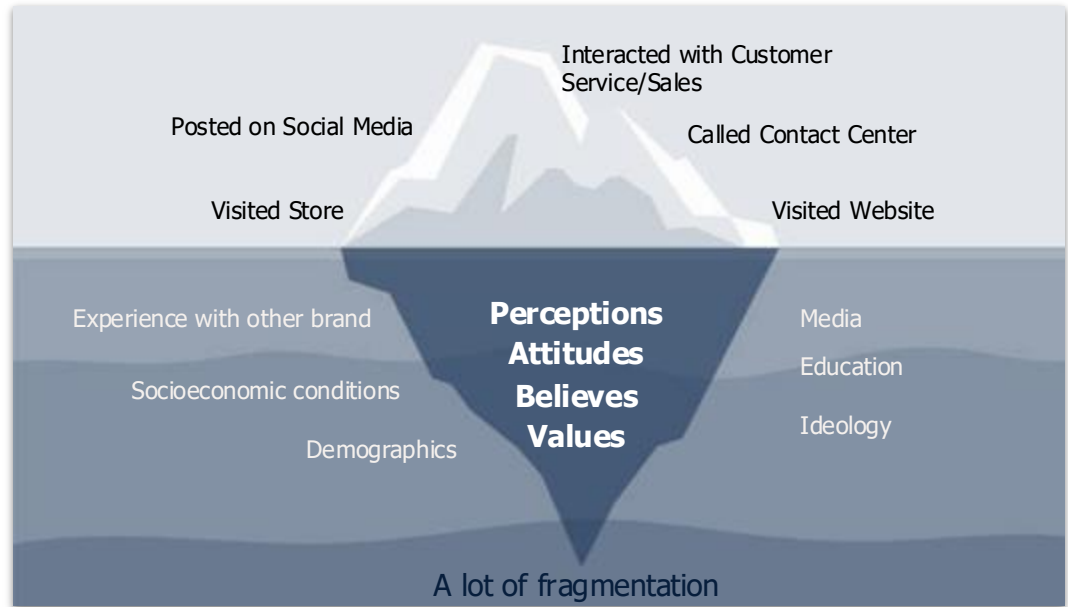


# Why Market Research Matters in CX

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

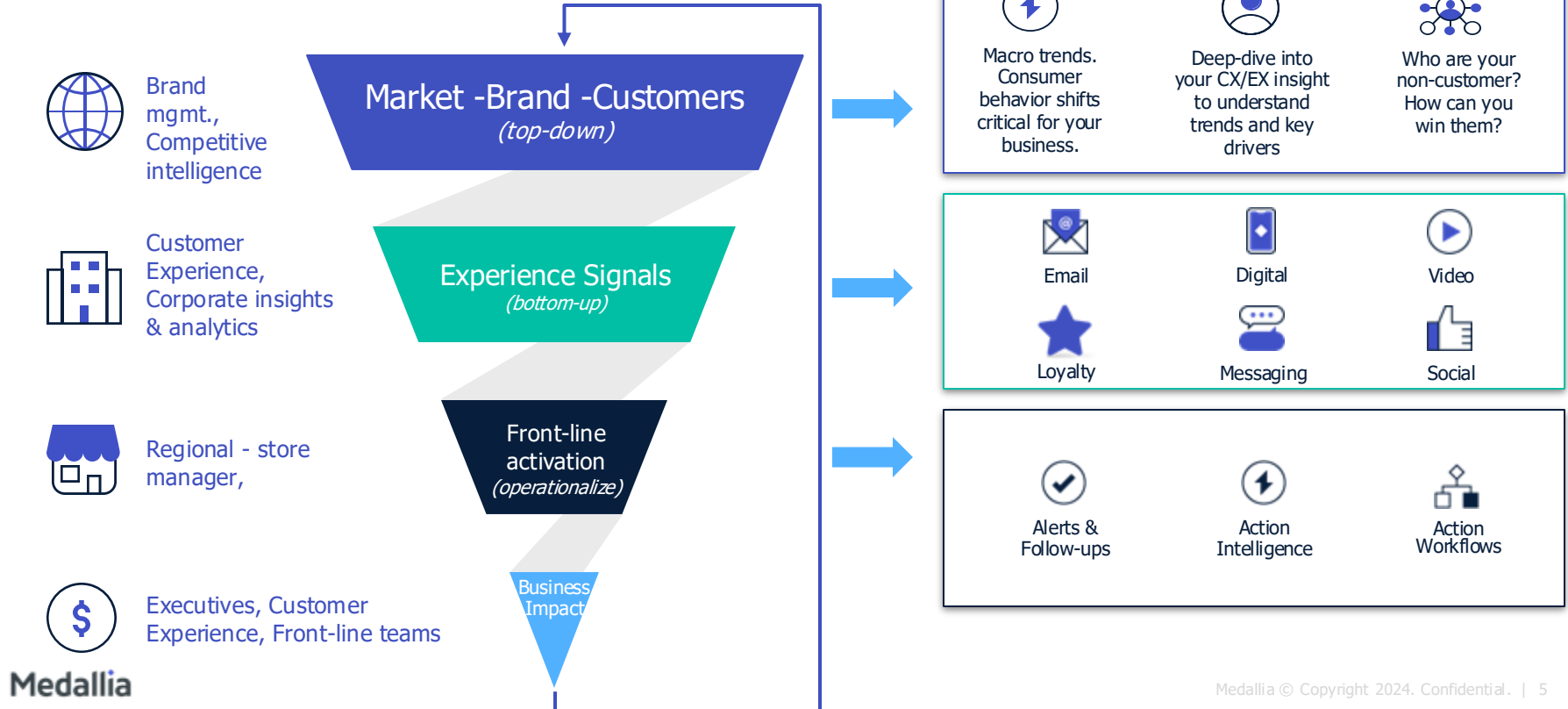
Experiences **with** the brand  
Proactive Feedback  
Vocal Minority

Experience **outside** of the brand  
Non-Customers  
Silent Majority



# Turning signals to actions

Combining the inside and the outside of your four walls





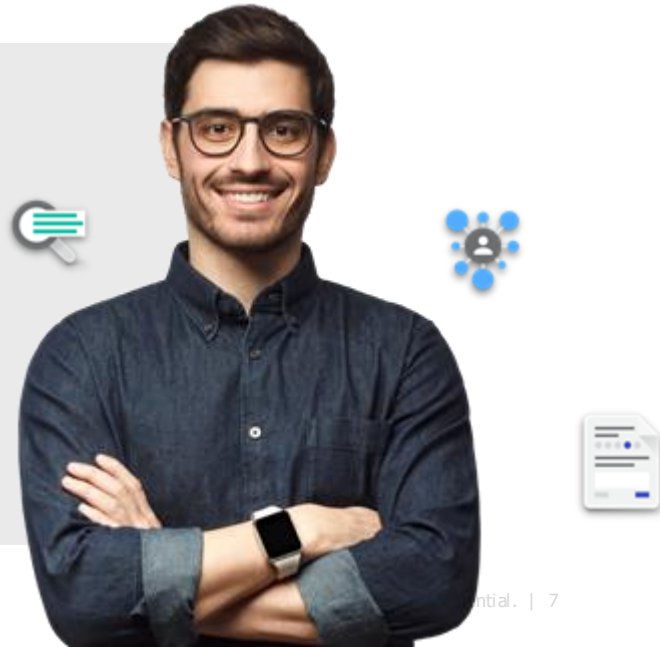
# What is Agile Research?

# Medallia

## 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

# 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



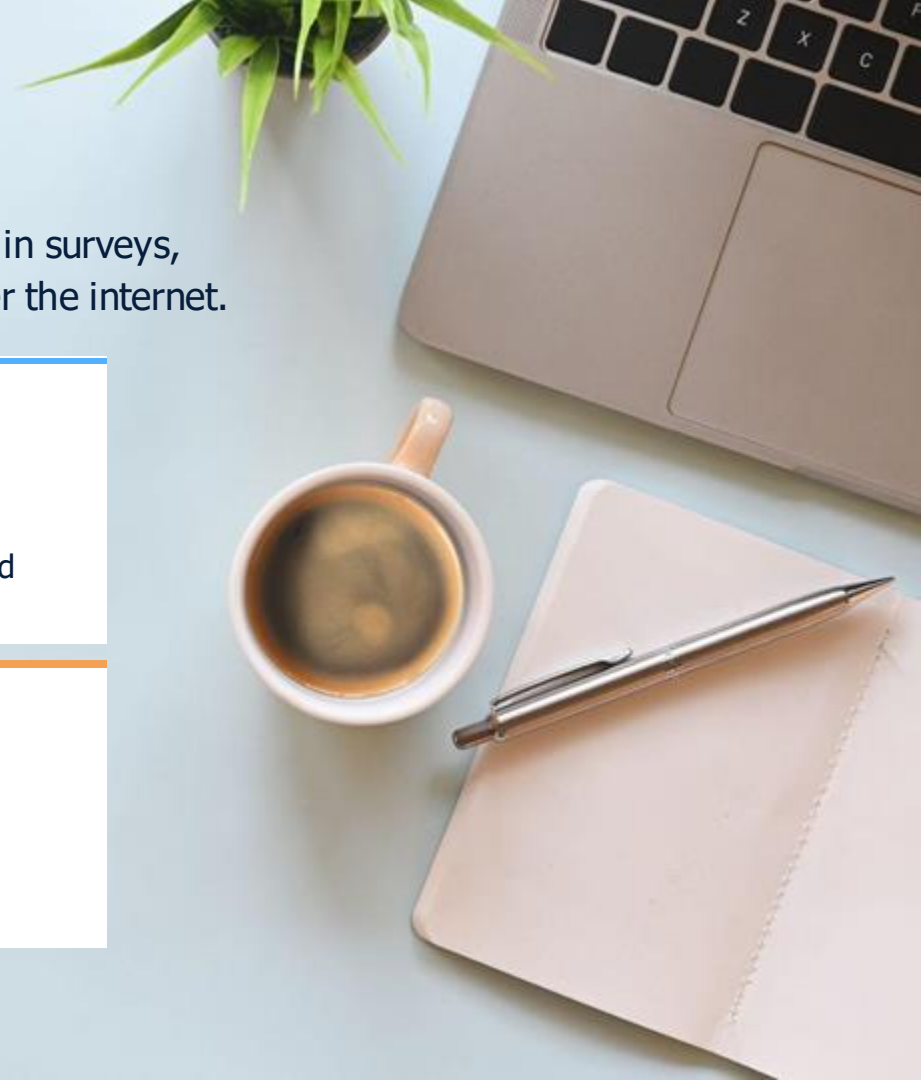
High participation rates



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

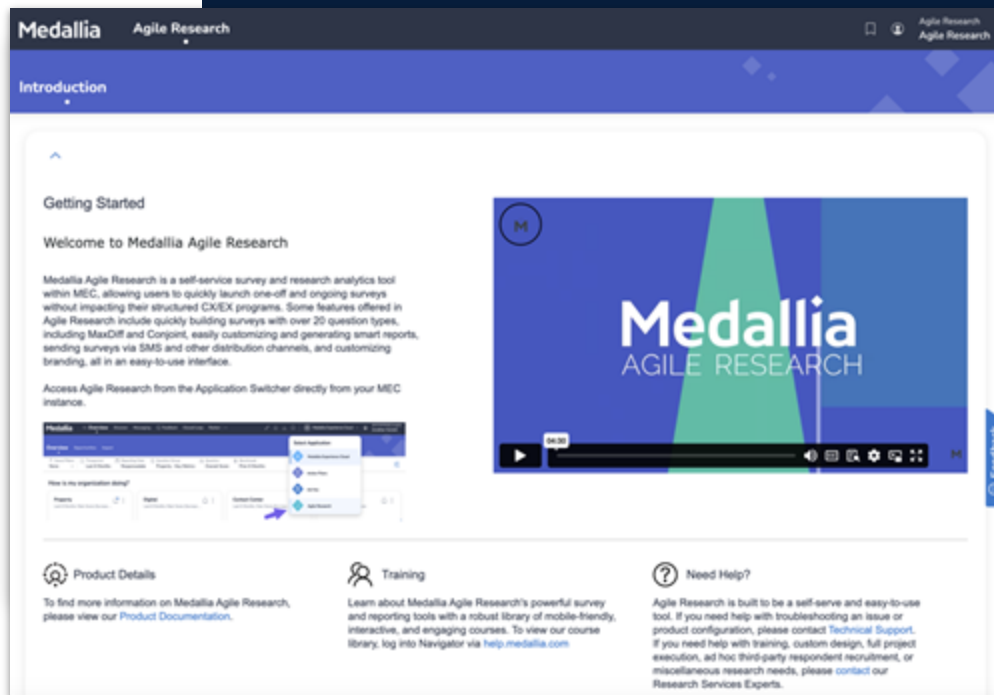
You will need to switch over to EDR to gain access to Agile Research

Please reach out to your account manager for more information

# 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

### EVENTS

# 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](#)



Thank you!