

SAP and Qualtrics in the Experience Economy

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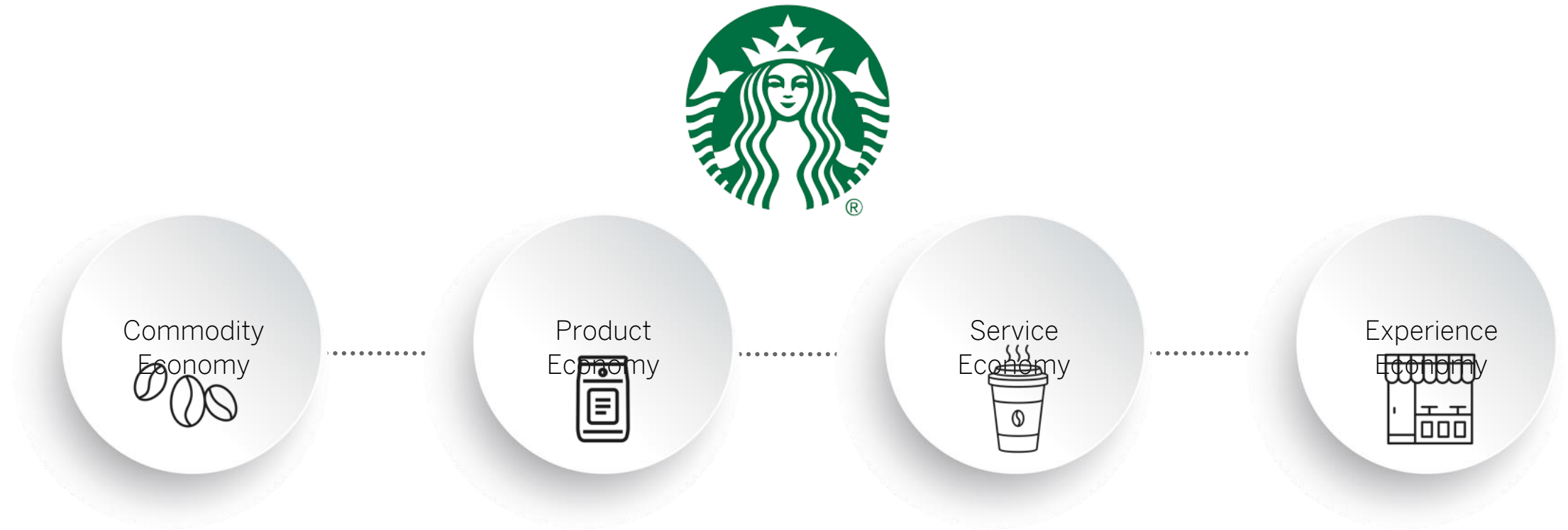
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The Experience Revolution



Industry Disruption is Clear



Transportation industry

Market share in last 4 years:

- *Taxis from 37% to 6%*
- *Ride hailing rose to 71%*



Financial Services

Mobile payments - 2/3
of people in China
using Wechat and
Alipay.



Education

Universities

- ***High churn rates***
- ***Online courses*** have more than doubled.

The obsession to drive the best Customer Experience has completely disrupted and reshaped industries. New business models designed around CX are gaining significant market share.

Human Experience Impacts Strategic Priorities Across All Industries



"...it is really around just delivering elevated consumer experiences at every single touch point. Be it the on-line experience, the ordering experience, the product experience, the machine. Every single one delivering an excellent experience for the consumer and we are growing very fast in that..."

Steven Presley, CEO Nestle USA



You walk into a retail store, whatever it is, and if there's a sense of entertainment and excitement and electricity, you want to be there."

Howard Schultz, Former Chairman, Starbucks



"Our ability to satisfy changing consumer preferences with respect to type or size of vehicle, as well as design and performance characteristics, affects our sales and earnings significantly."

Ford 2017 Annual report



"Employees don't only want to make a living; they want to contribute to the world. An adaptive company culture that promotes community responsibility and sustainability drives sales and can cut costs."

Indra Nooyi - Former PepsiCo Chairman and CEO



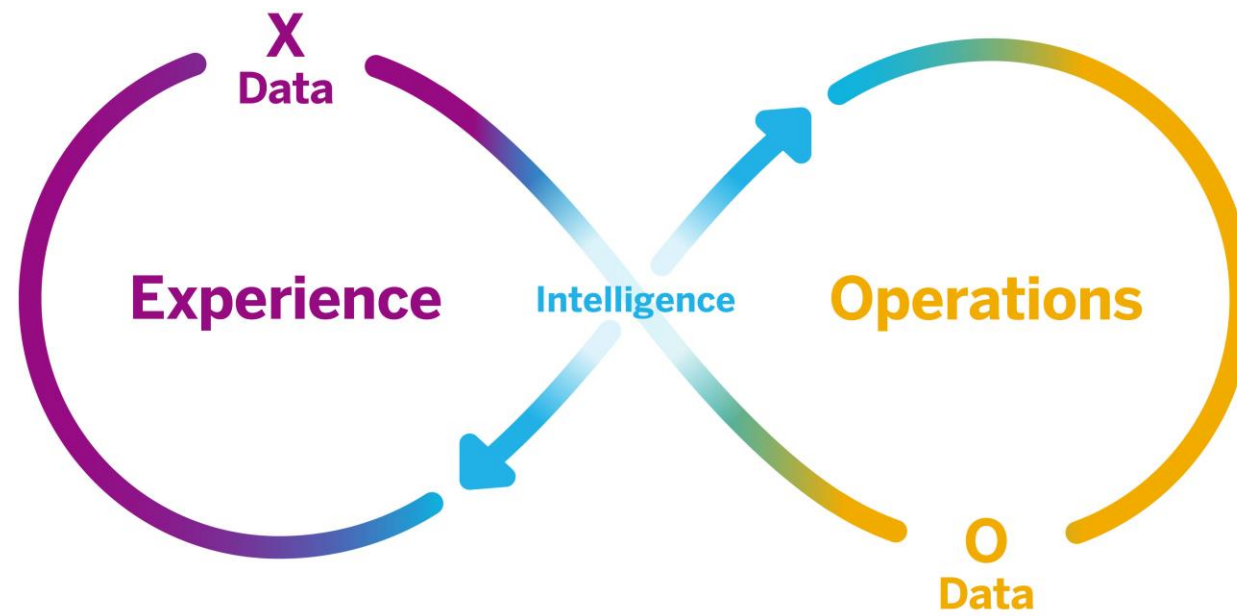
"I want to make sure we listen to consumers/patients - people that are using the product to send signals back into the enterprise to be more responsive to the needs of who those individuals are. How do we pull those digital threads back through all functions and think about cross-functional not being siloed or too narrow in thought".

Jim Sholefield, Merck CIO / CDO

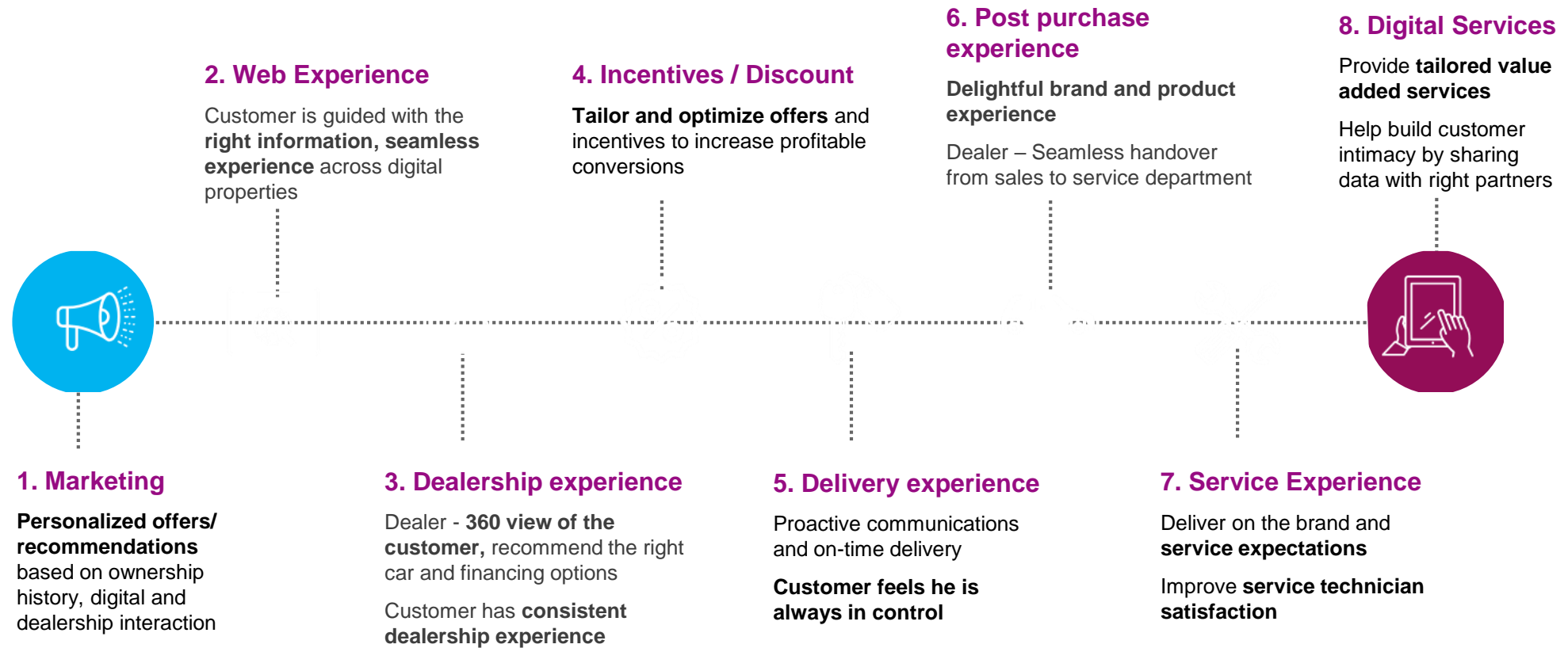


"We are committed to creating an open and inclusive work environment where results are achieved through the skills, abilities and talents of our workforce."





Deliver the Perfect Journeys for Your Customers





Belkin closed a **forecasted sales gap of \$80M** and moved from a mediocre 3 star rating to the #1 spot in their category on Amazon during product launch



How Do You Conduct Research At The Speed Of Sound?



Industry: Consumer Goods

Use Cases: PX

INSIGHTS AT EVERY STAGE, FROM CONCEPT TO POST-LAUNCH

Whether you're using Qualtrics for rapid research or highly complex studies, no other tool offers greater flexibility or ease of use. For Yamaha, that led to quick adoption of Qualtrics throughout their entire organization and gave them the ability to conduct projects with incredibly fast turnaround times.

HOW YAMAHA CLOSED THE EXPERIENCE GAP

- Yamaha uses Qualtrics to run hundreds of quick-turn studies during product development to ensure that they catch potential misfires before a prototype has been fully developed or the finished product has gone to market.
- So, for example, when a question was raised during development of Yamaha's Montage keyboard—regarding where to use knobs versus sliding faders—Yamaha used Qualtrics to survey their customers and received 400 responses in a matter of hours. What might've taken a week or more to debate internally was resolved in less than a day with actionable insights from actual musicians. And most importantly, Yamaha got it right.

- **2X increase in rapid research**
- **#1 best selling keyboard in industry**
- **Prestigious industry awards**

Increasing Revenue By Linking X + O Data Via Customer Churn Modeling



HOW SPRINT CLOSED THE EXPERIENCE GAP

- Created a Customer Churn Prediction Model
- Determined the top drivers for customer churn
- Proactively Engaged Predicted Churn Candidates

- **7.2 M Expected Revenue Growth**
- **22pts Reduction in digital cart abandonment**



Asking the right people, the right questions, at the right time

Feedback Analysis

O Maintenance Details

X Post-Maintenance Survey

Tetra Pak gets **specific, real-time feedback on its maintenance work**, with surveys delivered the moment a job is completed and questions tailored to the customer.



Understanding more about their happy and unhappy customers

Customer Insights

O Customer Segments

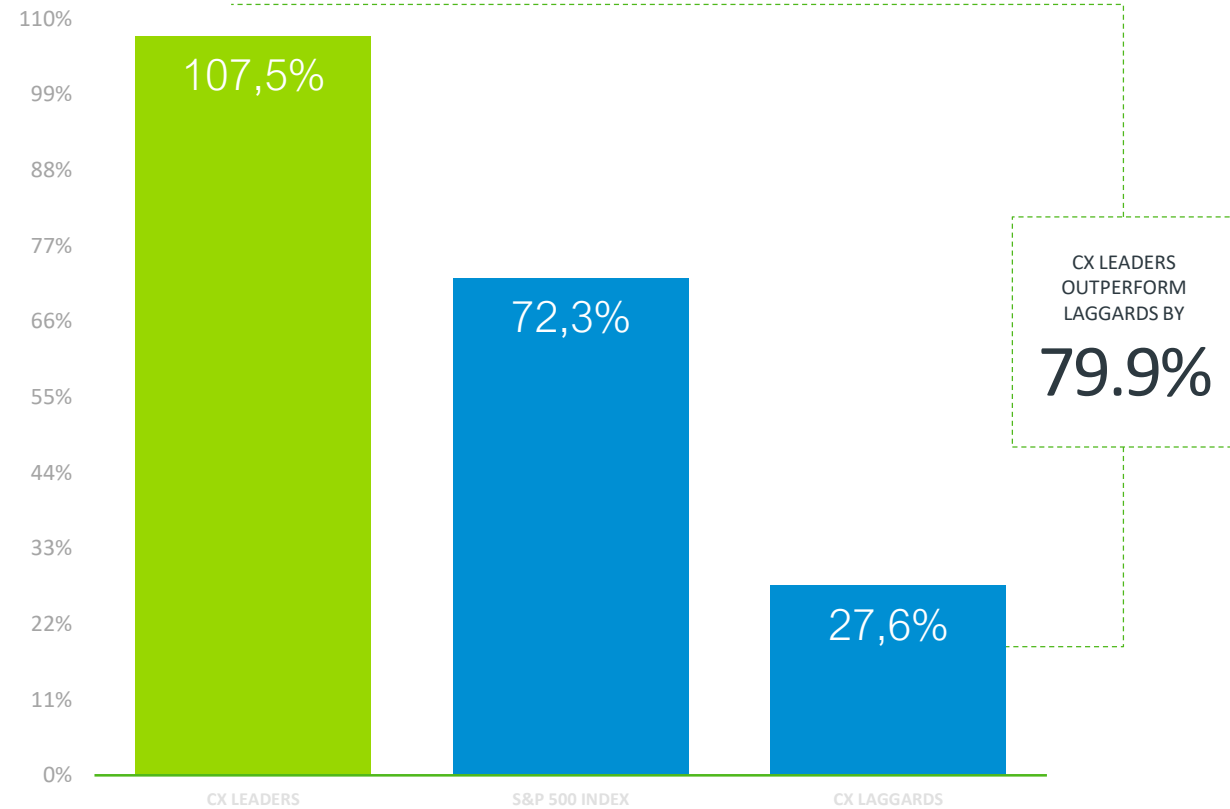
X Customer Feedback

SAP O-Data systems, meet Qualtrics X-Data systems. Tetra Pak's integration of the two means it **can break down experience data by 100s of customer segments**.



XM leaders outperform the market

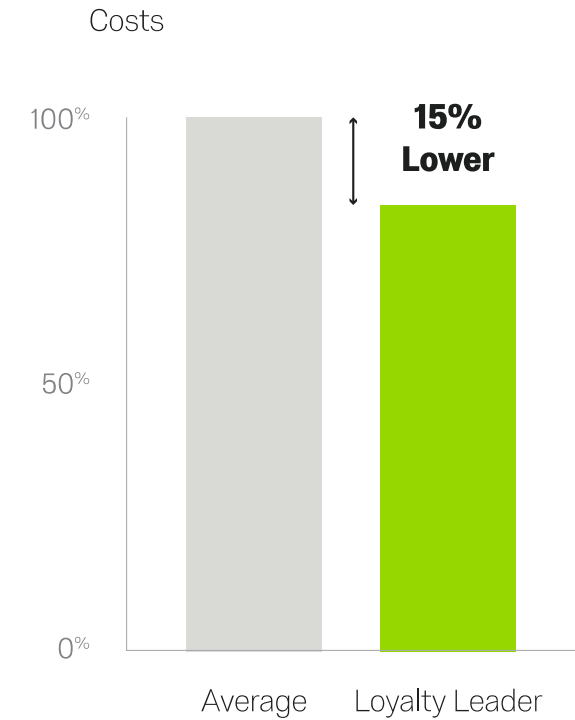
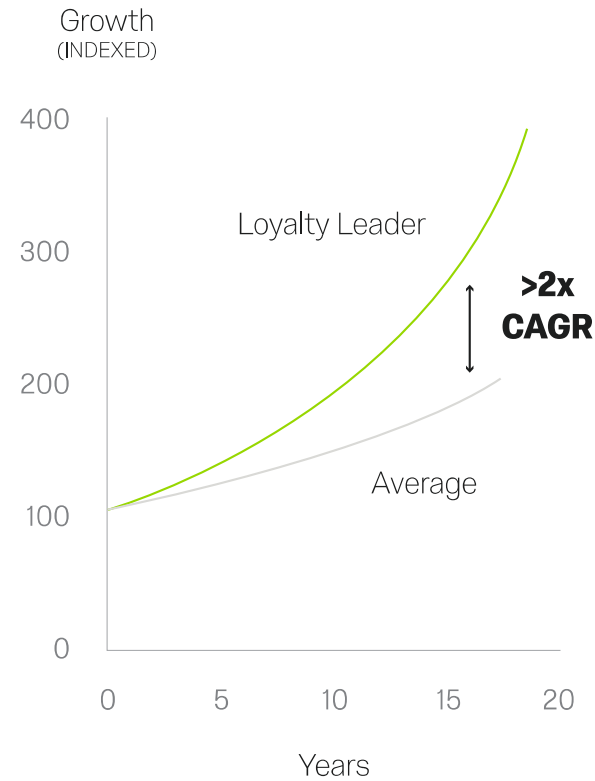
8-year stock performance of customer experience leaders vs. laggards (S&P 500, 2007-2014).





XM leaders grow faster and cost less

- Buy more
- Stay longer
- Refer friends
- Provide feedback and ideals

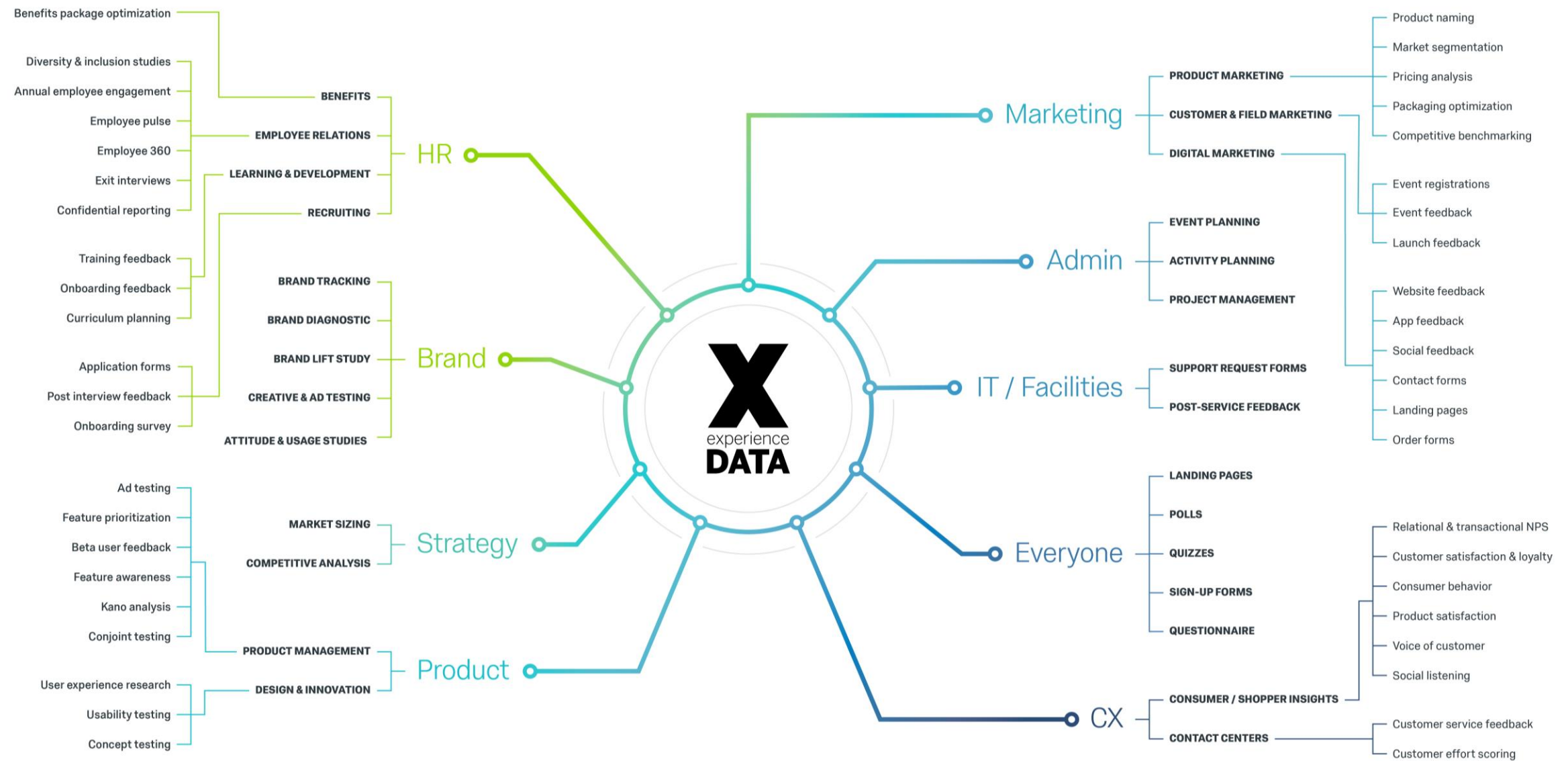




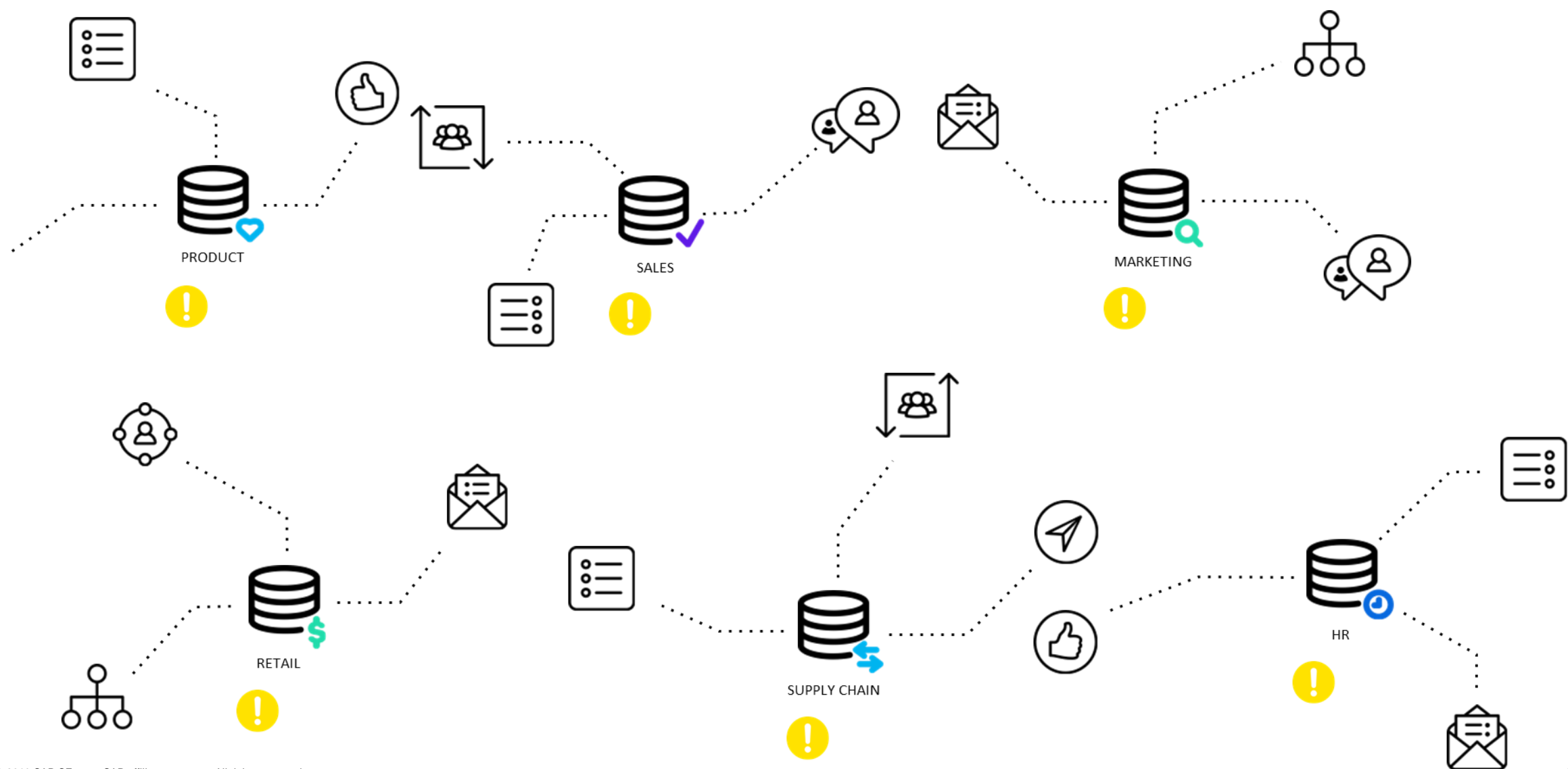
Building an XM Discipline



X-data is everywhere: Every organization, department and team collects feedback

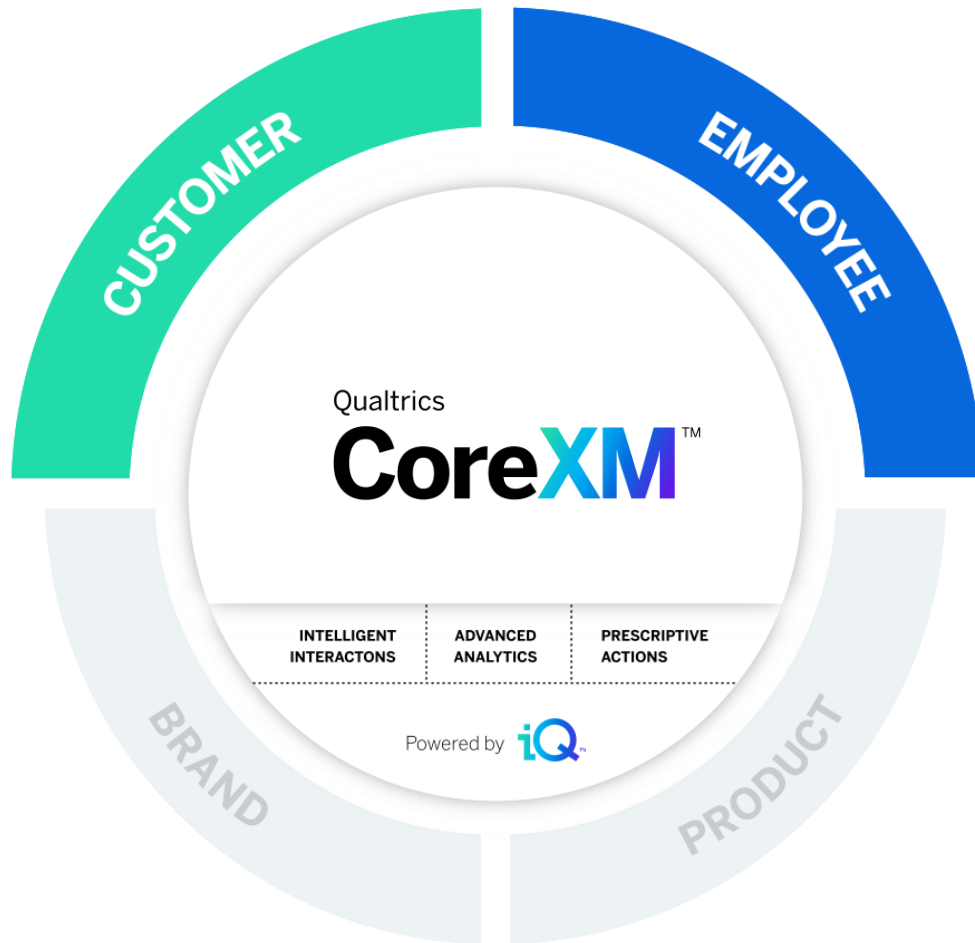


Often Experience data is highly fragmented and fails to deliver actionable insights



Qualtrics Product Portfolio

Close Experience Gaps by listening, understanding and acting on X-data



LISTEN

Collect Experience data from stakeholders at every meaningful touchpoint

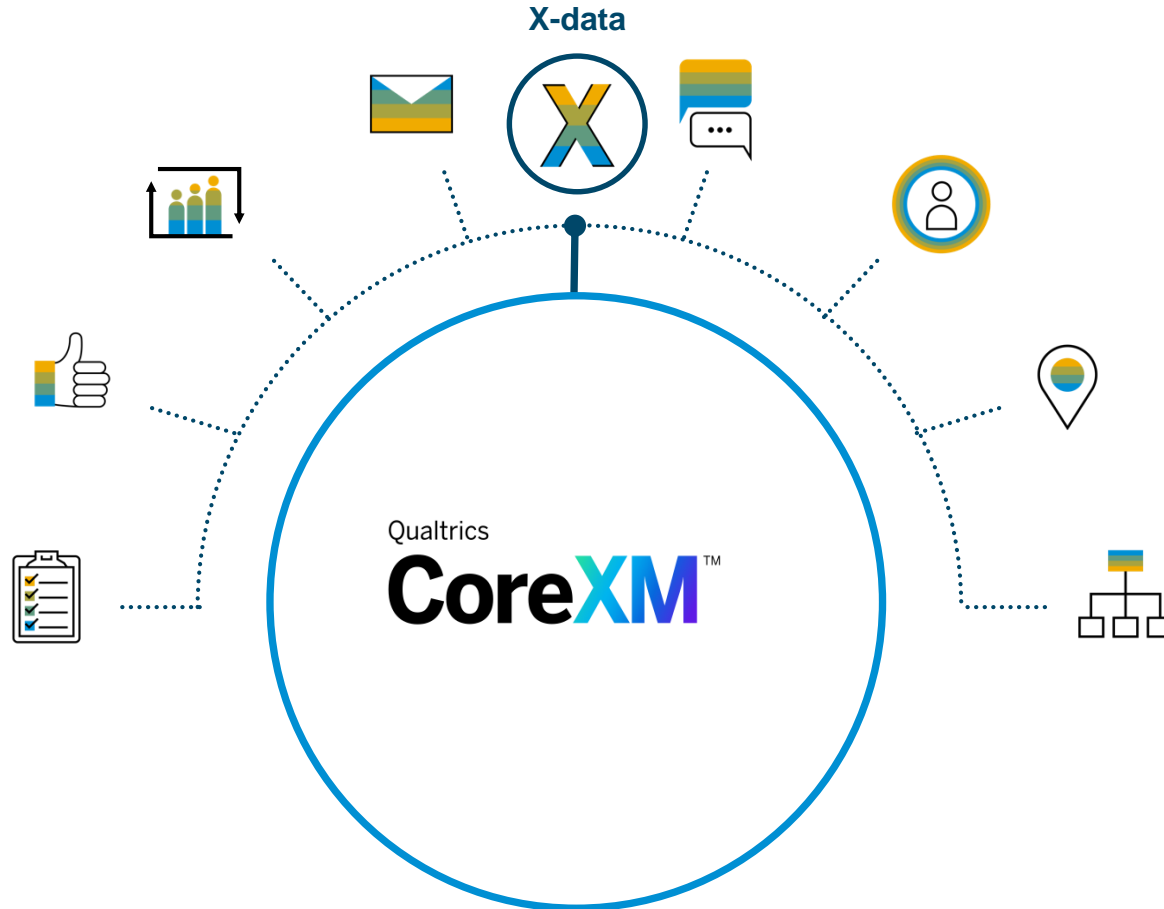
UNDERSTAND

Why things are happening and What to do about it

ACT

Make continuous improvements that improve customer, employee, brand and product experiences

Qualtrics CoreXM: Platform to Manage all your X-data in one place



1 Single System of Record

Centralize all X-data on your customer, employee, brand and product experiences

2 Empowered employees

Empower every employee with the insights they need to make the right business decisions

3 Enterprise-Grade

Best-in-class security, compliance and governance

4 System of Action

Drive action and improvement by embedding X-data into your operational systems

the XM PLATFORM



3/4

of the Fortune 100
rely on Qualtrics for insights that
drive growth and profitability



THANK YOU!

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THE BEST RUN **SAP**