

GTM Evolution on the journey to Scale & AI

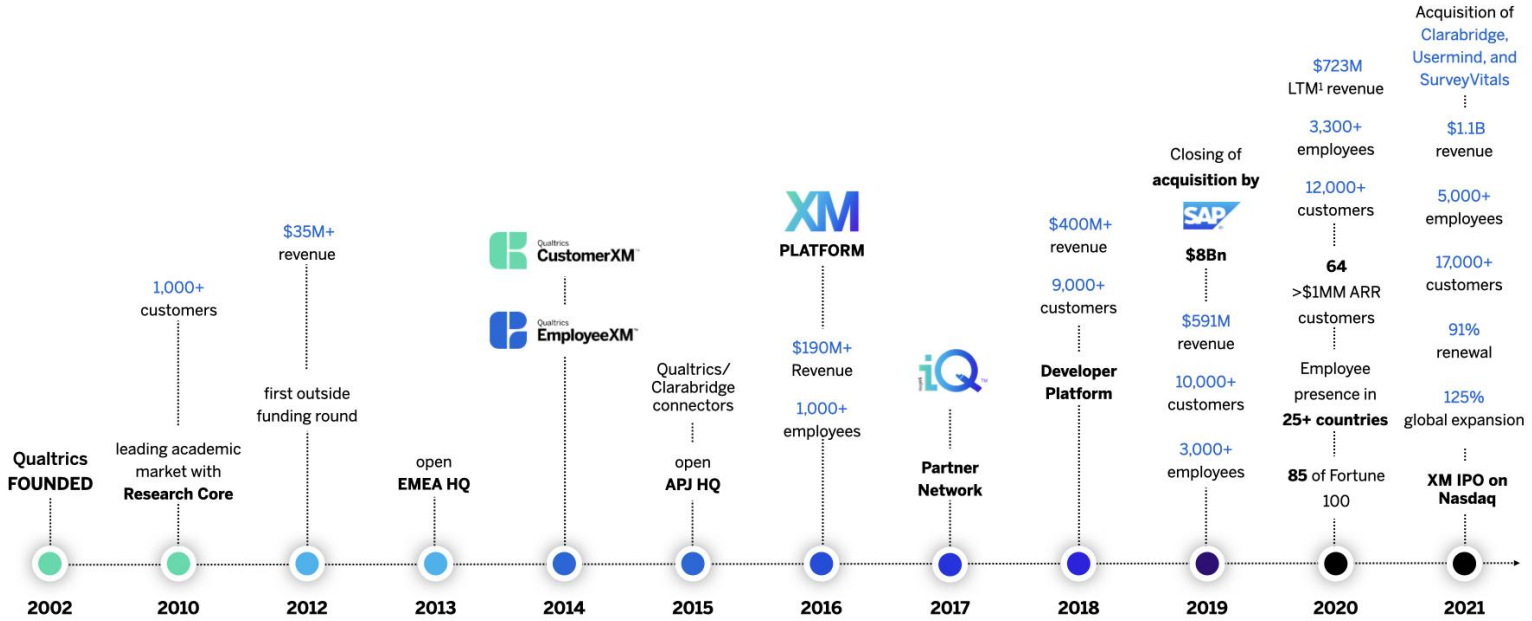
GTM SUMMIT 2024

Abhi Ingle
Chief Business Officer, Qualtrics

qualtrics XM

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The Qualtrics Journey



ACADEMIC	CORPORATE	ENTERPRISE	SCALING GLOBALLY
Easy-to-use analytical platform	Multiple use cases start to evolve	Buildout of XM Platform	Post-acquisition

1-for the 12 Months ending september 30,2020

WGUHWGUT



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Considerations On The Journey To Scale & AI

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Starting - Single Product, Simple Price, AEs do it all, Size Segmentation, Demand Gen!

- Geo expansion following your ICP closely to achieving “basic brand recognition”
- Expand from your CORE ICP to adjacent, Use Cases Rule: incremental functionality, SAM+

Rapid Growth: Brand, Use Cases, Products,Buying Center BU (pre-sales, price) XMI, XM Mecca : X4!

- For expansion into different buyer - consider BU style incubation; distinct sales/quotas.
- Value realization-outcome metrics, experts, deal size: Focused “C” suite/Blue Zone, Swarm
- Put competitors in their boxes - KMA , Delighted!

Efficient Scale & Growth: Verticalization; Data, Buying Center suites; Simplifed pricing

- Collapse BU structures for scaled products, simplified suites & pricing will reduce specalists
- XM Institute, Systems to scale pre-sales, **value delivery,** rev intelligence, Vertical AEs, product pre-sales

What Changes with

AI?

AI Considerations “The Golden Rule”

qualtrics XM

- Proprietary Data
- What New Products or AI enhancements make sense?
- Value Proposition to customers & to Qualtrics
- UI Considerations
- Pricing Metrics

Evolution of Positioning, Products & Brand

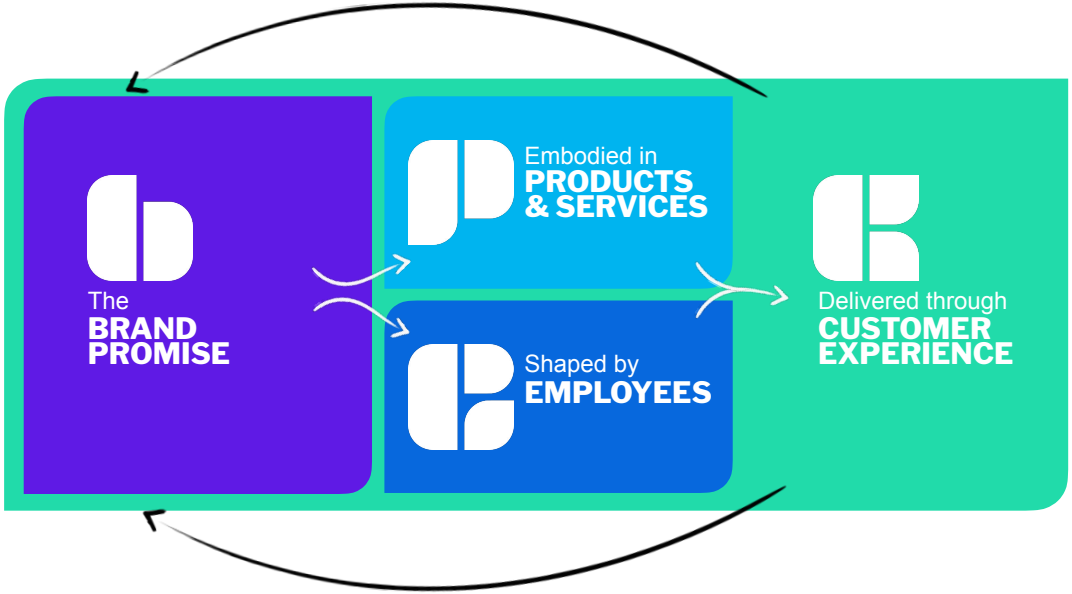
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Qualtrics leads the enterprise feedback market

G2 Crowd Grid for Enterprise Feedback Management



To succeed in a highly competitive market, companies must differentiate themselves with a holistic approach to XM which allows them to bring all experience disciplines together



The Qualtrics Experience Platform: Single Data Model



Ask
Solicited

Observe
Digital

Listen
Unsolicited



Process & Understand

Develop u**nique experience profiles** for each customer and employee to **track their experience over time**



Do The Right Thing

Take the **appropriate next right action** based on their history and context, at scale

2024 Edelman Trust Barometer

To Be Trusted With Innovation, Give Me a Voice

Percent who say this is **important** to earning or keeping their trust in each institution to be good managers of change, showing the top 3 actio

GLOBAL 28

Across institutions, listening is a top 3 trust-building action

Business	%
Keep innovations affordable	84
Communicate pluses and minuses	83
Hear our concerns, let us ask questions	**82**

NGOs	%
Aid the vulnerable	79
Hear our concerns, let us ask questions	**78**
Help people keep up	78

Government	%
Hear our concerns, let us ask questions	**82**
Communicate pluses and minuses	80
Institute safeguards	80

Media
Hear our concerns, let us ask questions
Communicate pluses and minuses
Investigate innovations

Making business more human

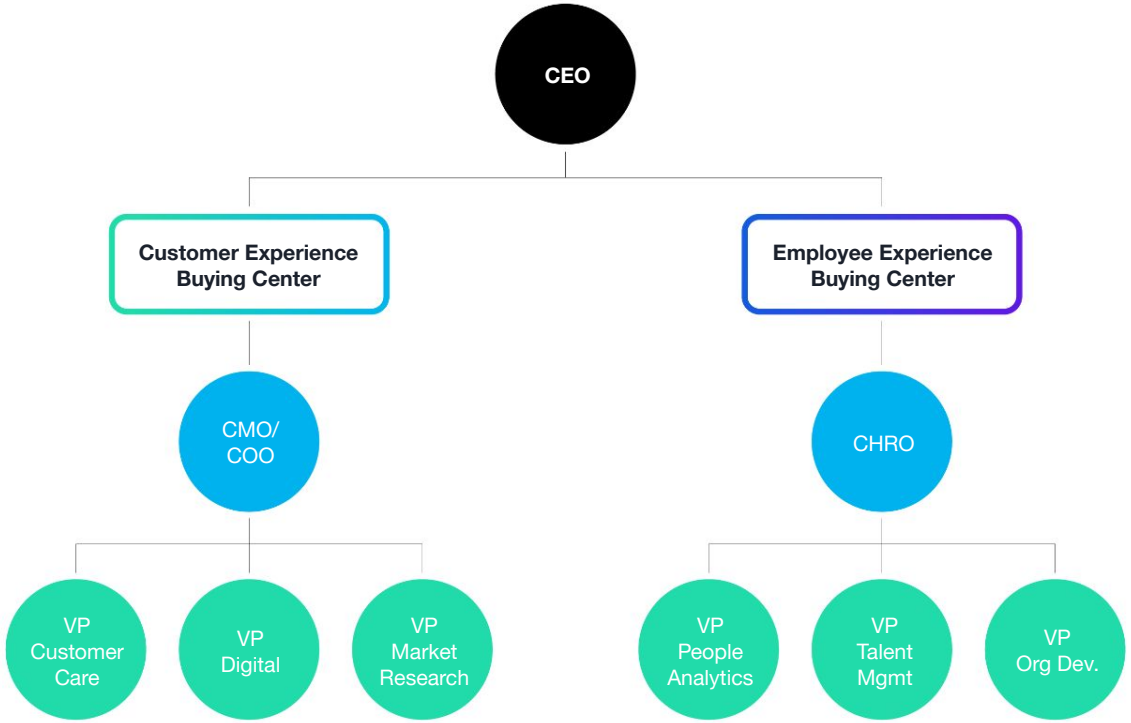


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Move to a Buying Center Based Strategy: ICPs Within ICPs

- Budget Center
- Buyer – Decision Maker

SPECIFIC VALUE & ROI METRICS TAILORED TO EACH ROLE & FUNCTION




10

Three suites.
All powered by Qualtrics AI

FOR COOs + CMOs + CXOs

XM FOR
Customer Frontlines

Give frontline teams the best AI-guided customer experience software with tailored solutions for efficient resolutions in contact centers, locations, and digital channels including automatic identification of the most costly friction points in omni-channel experiences.

FOR CHROs

XM FOR
People Teams

Give managers at every level AI-surfaced recommendations on the next best steps they can take to drive engagement and productivity. And take advantage of AI-driven analytics that help reduce costly attrition, optimize the candidate journey, and more.

FOR CMOs

XM FOR
Strategy + Research

Make research more cost-effective across your entire practice with conversational surveys for a deeper level of insight, video feedback that can be analyzed and interpreted at scale in minutes, and AI that makes it easy to access all your organization's research in one place.

AI powered experiences are **only available** in the new suites and products.



XM FOR

Strategy + Research

a single platform to address research challenges head-on

Organizations Face Risk And Business Impact Due To Broken Experiences

10%
of product launches fail for avoidable reasons

30%
of product development resources are wasted

5%
of marketing campaigns could have been more successful

13%
of marketing spend is wasted

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What We Got Right

qualtrics XM



Pivoted From Mkt to Mkt beautifully



“Thought Leadership” (Event, XMI)



Platform architecture & common data model



Correctly identified “nature of mkt” and program/ pre-sales required to build



Culture: TACOS

What We Didn't Get Right or Learnt the Hard Way

qualtrics XM

Partners need to be part of leadership & cross functional mindset - product, pricing, platform, compensation, attribution shouldn't be constant friction

Pricing complexity, lack of sunset for old pricing will overwhelm sales/systems

BU's are great for incubation, dedicated sellers/pre-sales work - must evolve

Scrappy can become crappy if not evolved!

As company grows - ALIGNMENT OF SALES-MARKETING-PRODUCT is KEY !

Appendix for exhibits that i might show

XM Manager Assist

Home

View results

Brainstorm ideas

Plan of action

Welcome, Brad

Be your best and help your team grow



Discover insights

Understand what your team is thinking and feeling, and get the information you need to support them.

View results >



Ideate, together

Create a space for your team to brainstorm ideas and collectively collaborate.

Brainstorm ideas >



Turn ideas into actions

Create an action plan to set goals and track progress on focus areas that matter most.

Plan of action >

Manager Assist

Show filters (16)

All results › 2023 Q4 EX - Managers

Home

View results

Brainstorm ideas

Plan of action

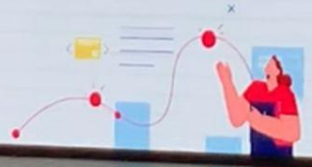
EX Headlines 1 of 11

↑ Back to top

Your team reports

- ✓ I can share my opinions openly with my team without fear of retaliation.
- ✓ I have the training I need to do my job effectively.
- ✓ My manager treats me with respect.

View scores for strengths



Opportunities to support your team

Assist

2023 Q4 EX - Managers

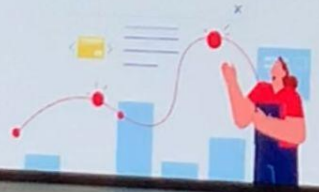
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Opportunities to support your tear

Dashboard Explorer

how do I compare to my peers and competitors

To understand how you compare to your peers and competitors based on the survey data, you would typically look at the following:

1. **Manager Effectiveness Scores**: Compare your Manager Effectiveness score to the average score of your peers within the company. This can give you an idea of how well you are performing in relation to other managers.

2. **Qualtrics Overall Benchmarks**: Look at the "Qualtrics Overall" column in the survey data to see how your scores compare to the company-wide benchmarks. A positive score indicates you are outperforming the company average, while a negative score suggests there is room for improvement.

3. **Next Level Up Scores**: If available, compare your scores to those of the management level above you ("Next level up" column). This can provide insight into the expectations and performance standards at higher levels of management.

4. **Industry Benchmarks**: For a broader comparison, you may need to access industry benchmark data to see how your scores stack up against competitors. This information might be

Ask any question?

qualtricsei.qualtrics.com/portals/ui/manager-assist/reporting-dashboard

Qualtrics Compan...

ager Assist

All results > 2023 Q4 EX - Managers

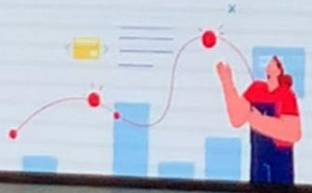
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Dashboard Explorer

what one action can I take that will have the biggest impact on employee engage,emt

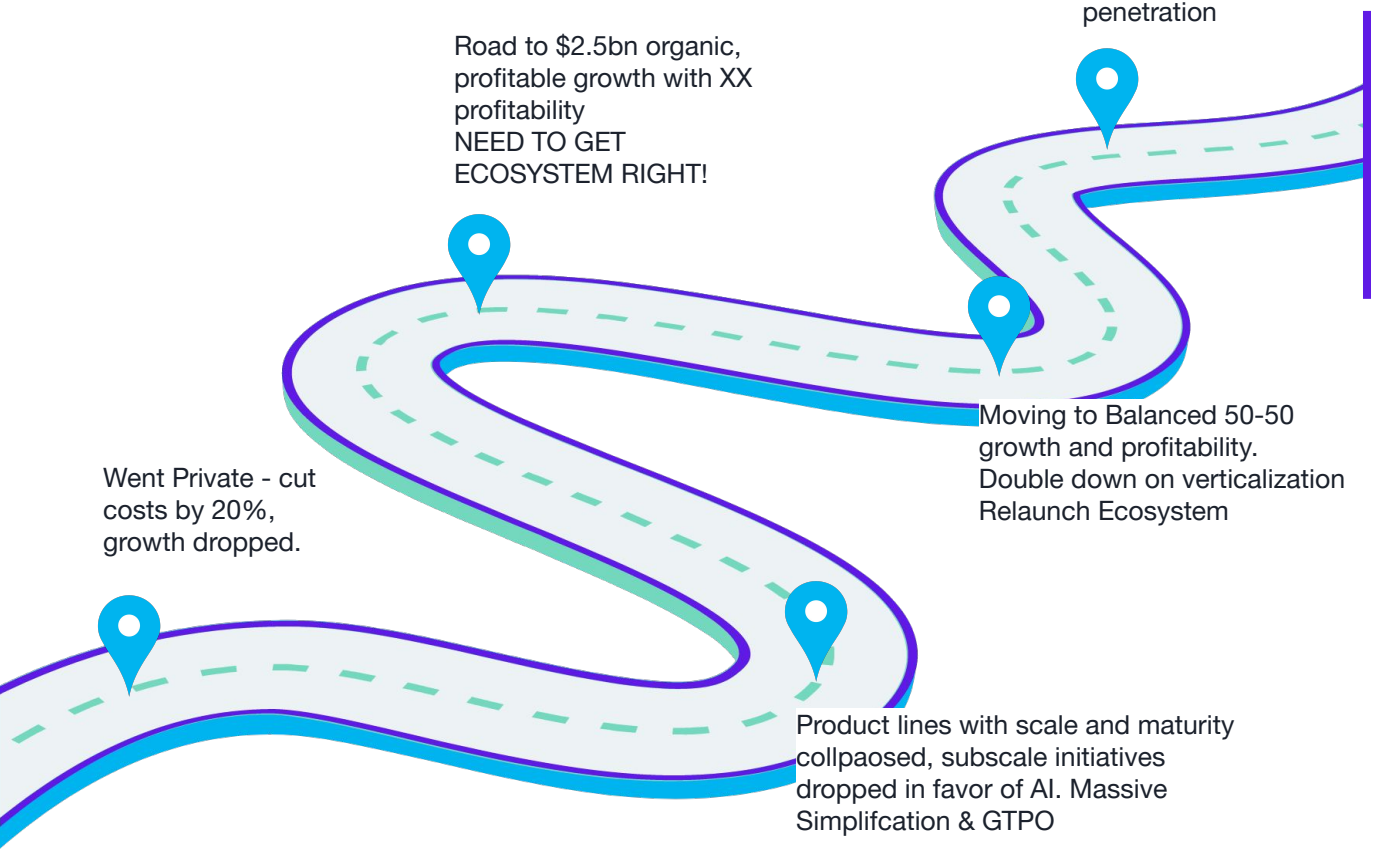
Based on the survey data and common drivers of employee engagement, one impactful action you could take is to improve communication and transparency within your team. Here's why:

- **Trust Building**: Open and honest communication fosters trust between employees and management. Trust is a foundational element of employee engagement.
- **Clarity and Alignment**: Clear communication about company goals, team objectives, and individual roles helps employees understand how their work contributes to the bigger picture, increasing their sense of purpose and alignment.
- **Feedback Loop**: Establishing regular feedback channels allows employees to voice their concerns and feel heard, which can boost their engagement and commitment to the team and company.
- **Change Management**: Transparent communication is especially crucial during times of change. It helps manage uncertainty and maintain engagement by keeping employees informed and involved.

By focusing on communication and transparency, you address several underlying factors that

Ask any question

Road to Profitable Scale



Rule of 40+
3x Value
$5-10bn

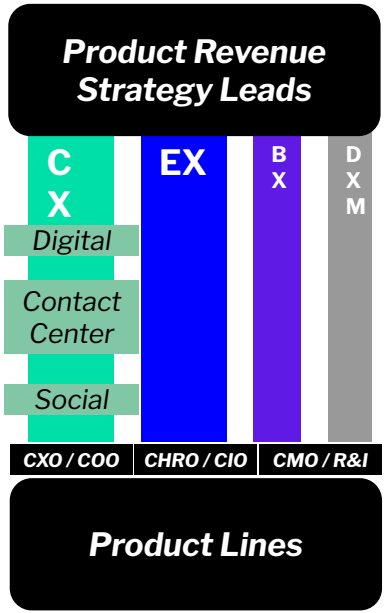
Exhibits:

1. Evolution of positioning/products
2. Examples of ICP/Buyer group evolution to enteprise scale
3. Key GTM change examples
4. Customer Value proposition in age of outcomes
5. Verticalization example
6. Value advisory and ROI

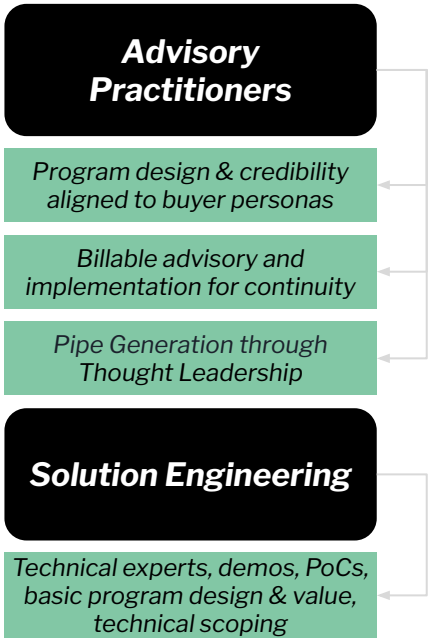
Simpler, better alignment of pre-sales teams to buyer personas

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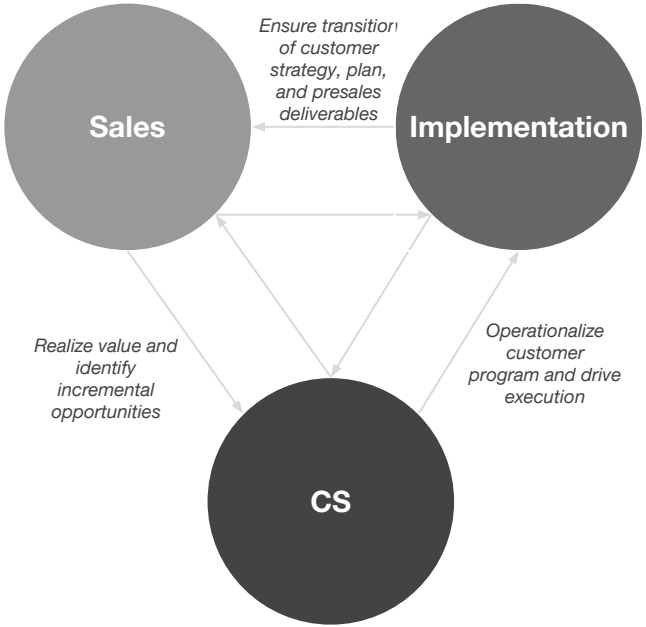
Pre-sales Strategy Teams map 1:1 to Product Lines



Consolidation of Pre-Sales Functions



Improve Process and Handoffs



qualtrics XM



Thank You.

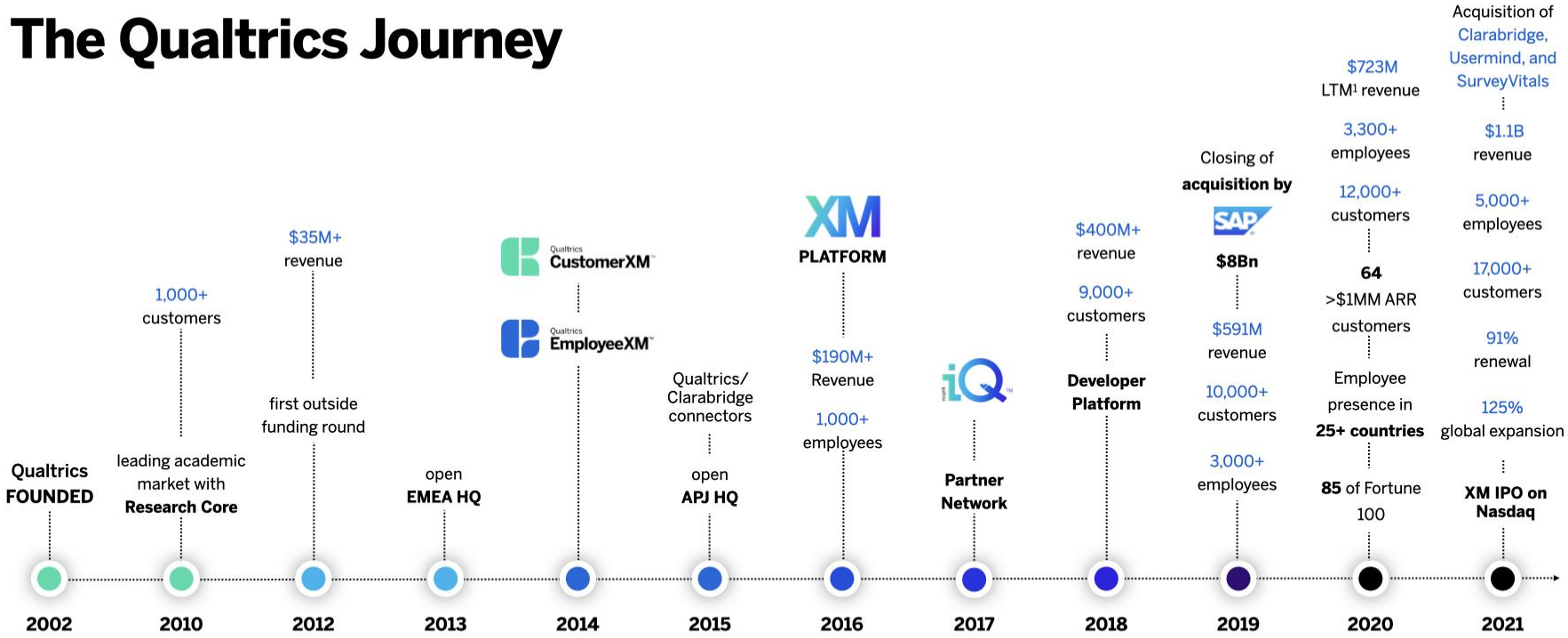
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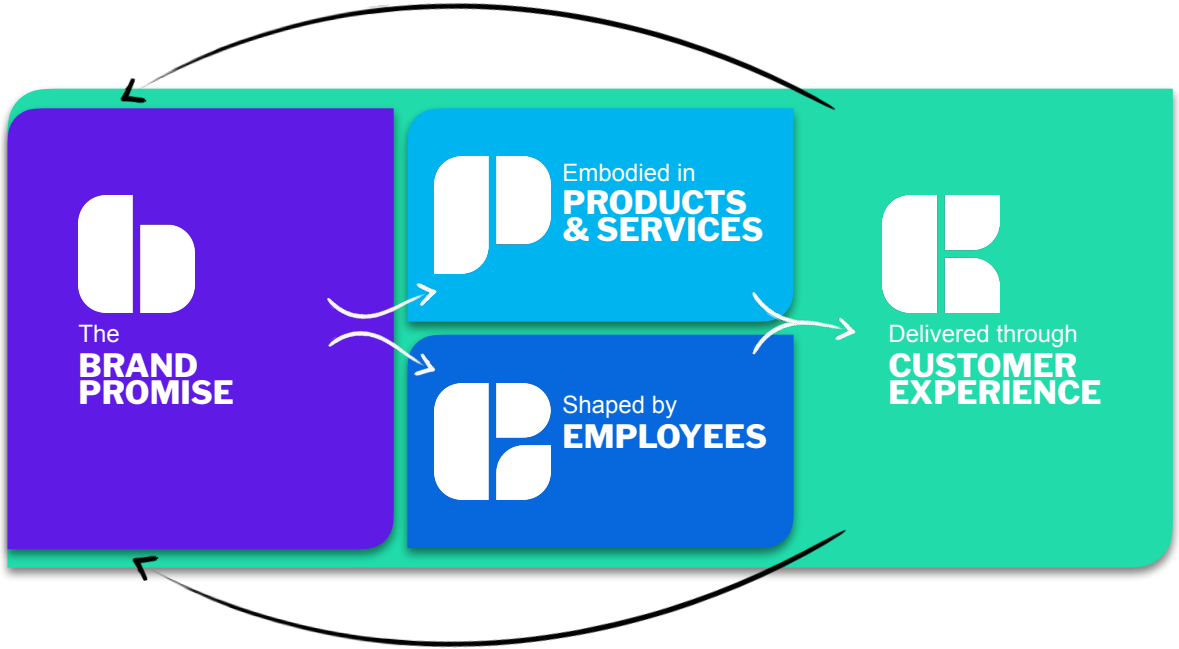
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To Be Trusted With Innovation, Give Me a Voice

Percent who say this is **important** to earning or keeping their trust in each institution to be good managers of change, showing the top 3 actions

GLOBAL 28

Across institutions, listening is a top 3 trust-building action

Business	%
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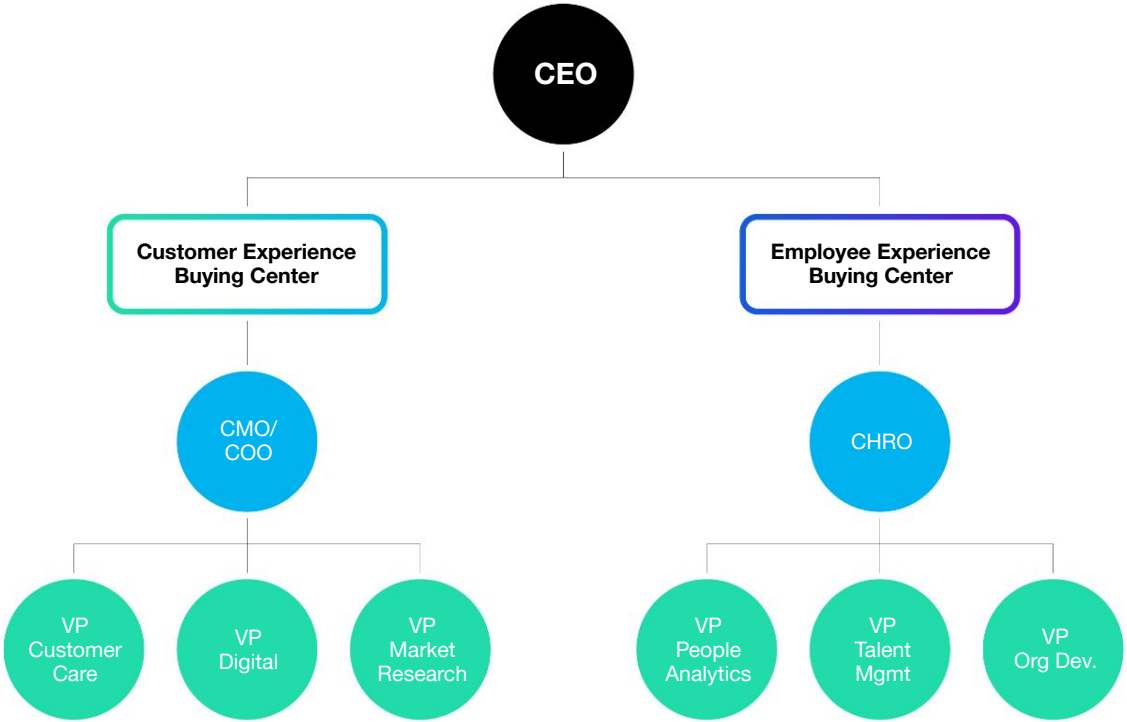
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Making business
more human
qualtrics.XM

https://www.qualtrics.com/x4summit/preview-video/

Move to a Buying Center Based Strategy

- Budget Center
- Buyer – Decision Maker



Three suites. All powered by Qualtrics AI

FOR COOs + CMOs + CXOs

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XM FOR

Strategy + Research

a single platform to address research challenges head-on

qualtrics.XM

ORGANIZATIONS FACE RISK AND BUSINESS IMPACT DUE TO BROKEN EXPERIENCES

10%
OF PRODUCT LAUNCHES FAIL FOR AVOIDABLE REASONS

30%
OF PRODUCT DEVELOPMENT RESOURCES ARE WASTED

5%
OF MARKETING CAMPAIGNS COULD HAVE BEEN MORE SUCCESSFUL

13%
OF MARKETING SPEND IS WASTED

Considerations On The Journey To Scale & AI

Starting - Single Product, Simple Price, AEs do it all, Size Segmentation, Demand Gen!

- ✓ Geo expansion following your ICP closely to achieving “basic brand recognition”, X4!
- ✓ Expand from your CORE ICP to adjacent, Use Cases Rule: incremental functionality, SAM+

Rapid Growth: Use Cases, Products,Buying Center BU (pre-sales, price, Brand:FITUMI)

- ○ For expansion into different buyer - consider BU style incubation; distinct sales/quotas.
- ○ Value realization-outcome metrics, experts, deal size: Focused “C” suite/Blue Zone, Swarm

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- ○ Collapse BU structures for scaled products, simplified suites & pricing will reduce specalists
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What Changes with AI?

AI Considerations
“The Golden Rule”

1. Proprietary Data
2. What New Products or AI enhancements make sense?
3. Value Proposition to customers & to Qualtrics
4. UI Considerations
5. Pricing Metrics

What We Got Right

- **Pivoted From Mkt to Mkt beautifully**
- **“Thought Leadership” (Event, XMl)**
- **Platform architecture & common data model**
- **Correctly identified “nature of mkt” and program/pre-sales required to build**
- **Culture: TACOS**

What We Didn’t Get Right Or Learnt The Hard Way

- **Partners need to be part of leadership & cross functional mindset - product, pricing, platform, compensation, attribution shouldn’t be constant friction**
- **Pricing complexity, lack of sunset for old pricing will overwhelm sales/systems**
- **BU’s are great for incubation, dedicated sellers/pre-sales work - must evolve**
- **Scrappy can become crappy if not evolved!**
- **As company grows - ALIGNMENT OF SALES-MARKETING-PRODUCT is KEY !**

APPENDIX FOR EXHIBITS THAT I MIGHT SHOW

Road To Profitable Scale



Rule of 40+
3x Value
$5-10bn

EXHIBITS:

1. Evolution of positioning/products
2. Examples of ICP/Buyer group evolution to enteprise scale
3. Key GTM change examples
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The Qualtrics Experience Platform: Single Data Model



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Solicited

Observe
Digital

Listen
Unsolicited



PROCESS & UNDERSTAND

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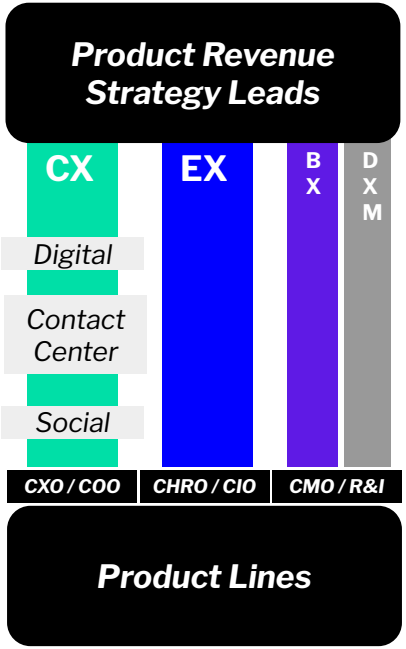
DO THE RIGHT THING

Take the **appropriate next right action** based on their history and context, at scale

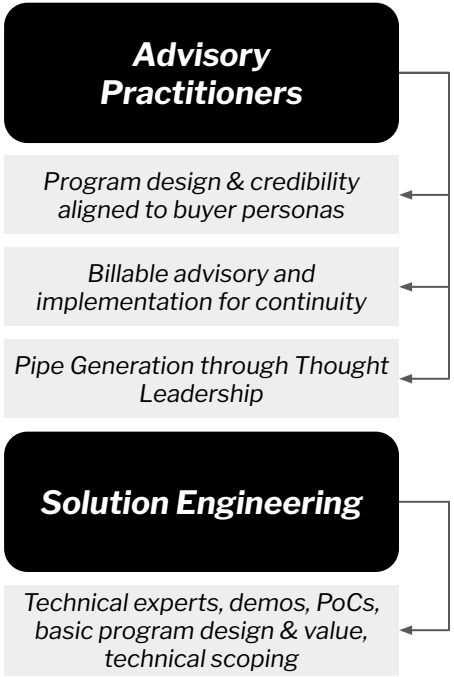
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Simpler, better alignment of pre-sales teams to buyer personas

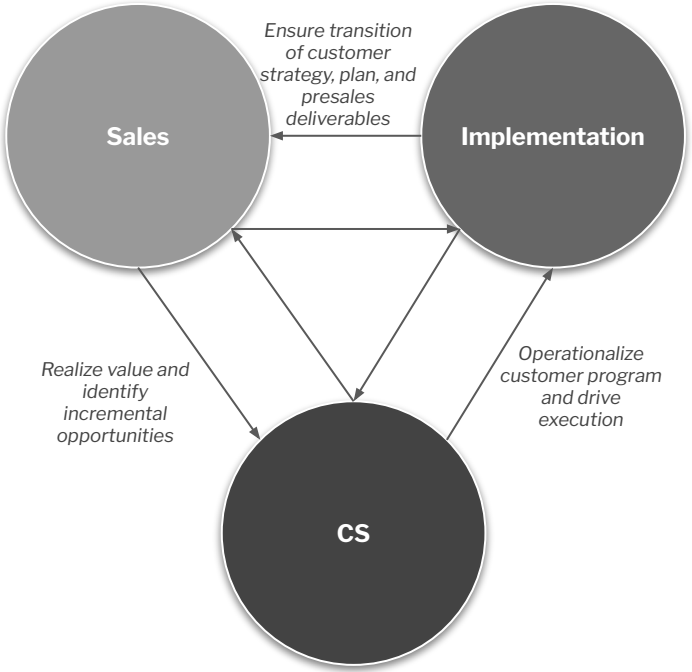
Pre-sales Strategy Teams map 1:1 to Product Lines



Consolidation of Pre-Sales Functions



Improve Process and Handoffs



XM FOR

Customer Frontlines

built for closing omnichannel experience gaps at scale and driving business outcomes



qualtrics.XM

ORGANIZATIONS FACE RISK AND BUSINESS IMPACT DUE TO BROKEN CUSTOMER EXPERIENCES

20%
OF FAILED CUSTOMER ACQUISITION ATTEMPTS COULD BE SAVED

2%
OF CUSTOMER SPEND IS LOST FROM ONE YEAR TO THE NEXT

16%
OF CUSTOMERS CHURN BECAUSE OF POOR EXPERIENCES

38%
OF CUSTOMER SUPPORT INTERACTIONS WOULD IMPROVE



XM FOR

People Teams

drives operational efficiency and growth in today's new business paradigm

qualtrics.XM

ORGANIZATIONS FACE RISK AND BUSINESS IMPACT DUE TO BROKEN EMPLOYEE EXPERIENCES

5%
OF HIRING COSTS AVOIDED THROUGH CANDIDATE AND EMPLOYEE EXPERIENCE

10%
OF WORKFORCE PRODUCTIVITY LOST DUE TO EMPLOYEE EXPERIENCE RELATED ISSUES

69%
OF VOLUNTARY ATTRITION AVOIDED THROUGH EMPLOYEE EXPERIENCE INITIATIVES

38%
OF EMPLOYEE SUPPORT INTERACTIONS WOULD IMPROVE

What does the healthcare experience evolution look like?

Empathy operationalized

A holistic approach to experiences that enables empathy at scale to engage patients, staff, and providers on their terms, investigate key moments, and act quickly to drive outcomes. All on a single platform.

Evolution of Experience Management

