

WEBINAR - DECEMBER 8 AT 12:30 PM (EST)

## LEGER PRESENTS: A DISCUSSION WITH OUR PARTNER, QUALTRICS

**Sandie Sparkman** Executive Vice-President, Client Solutions, Leger

**Isabelle Blanchet** Vice-President, Customer Experience, Leger MetriCX

**Yasmin Beddek** Enterprise Account Director, Qualtrics



**Leger**

qualtrics.<sup>XM</sup>

## PRESENTERS



**SANDIE SPARKMAN**  
Executive Vice-President,  
Client Solutions  
Leger MetriC*X*



**ISABELLE BLANCHET, CCXP**  
Vice-President, Customer Experience  
Leger MetriC*X*



**YASMIN BEDDEK**  
Enterprise Account Director  
Qualtrics

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## AGENDA

- Who is Leger?
- Who is Qualtrics?
- Why is Qualtrics partnering with Leger?
- Leger's role vs. Qualtrics' role
- Leger's services and approach within the Qualtrics partnership
- Questions





# Leger

THE LARGEST CANADIAN-OWNED  
POLLING, MARKET RESEARCH  
AND ANALYTICS FIRM

MONTREAL • QUEBEC

TORONTO • WINNIPEG • EDMONTON • CALGARY

VANCOUVER • PHILADELPHIA



## BUILT FOR SUCCESS

### THE BEST OF BOTH WORLDS

Get access to the best national expertise and solutions while working with local experts who thoroughly understand your market. Leger is the largest Canadian-owned polling, market research and analytics firm.

### DIVERSE CLIENTS WITH COMPLEX MANDATES

For **35** years, we have worked for the largest and most prestigious clients in the country across a variety of sectors. Being at the heart of our clients' strategy enables us to provide smarter insights and more actionable recommendations.

### ONE-STOP SHOP THE ONLY FULLY INTEGRATED MARKET RESEARCH COMPANY IN CANADA.

From operations to insights, we offer customized research solutions adapted to your needs, and can work with you every step of the way, from project inception to completion. We have professionals in all sectors and operational expertise from end-to-end.

### EFFICIENT OPERATIONAL STRUCTURE

We have **3** call centres (Montreal, Winnipeg, and Vancouver), focus group facilities across Canada and the largest proprietary online panel in the country, all of which enable us to deliver the highest quality research with the fastest turnaround time. We have the expertise to cover all regional realities in Canada, in a wide variety of languages, from coast to coast.

### THE MOST ACCURATE POLLING FIRM IN CANADA

Leger was the most accurate polling firm for the 2019 Canadian Federal Election, reflecting the quality of our online panel, and the expertise of our research experts and analytics team.

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**8** offices in Canada coast to coast and the USA, and over **600** employees, including **195** experts.



The background of the image shows a group of business professionals in a meeting, looking at documents and charts. A large, semi-transparent circular frame is centered over the image. The text is overlaid on this circle.

# Le<sup>g</sup>er

Metri<sup>CX</sup>

STRATEGIC AND OPERATIONAL  
CUSTOMER EXPERIENCE  
CONSULTING SERVICES

# CX DIVISION



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# THE ECONOMY OF EXPERIENCE





# WHO IS QUALTRICS?

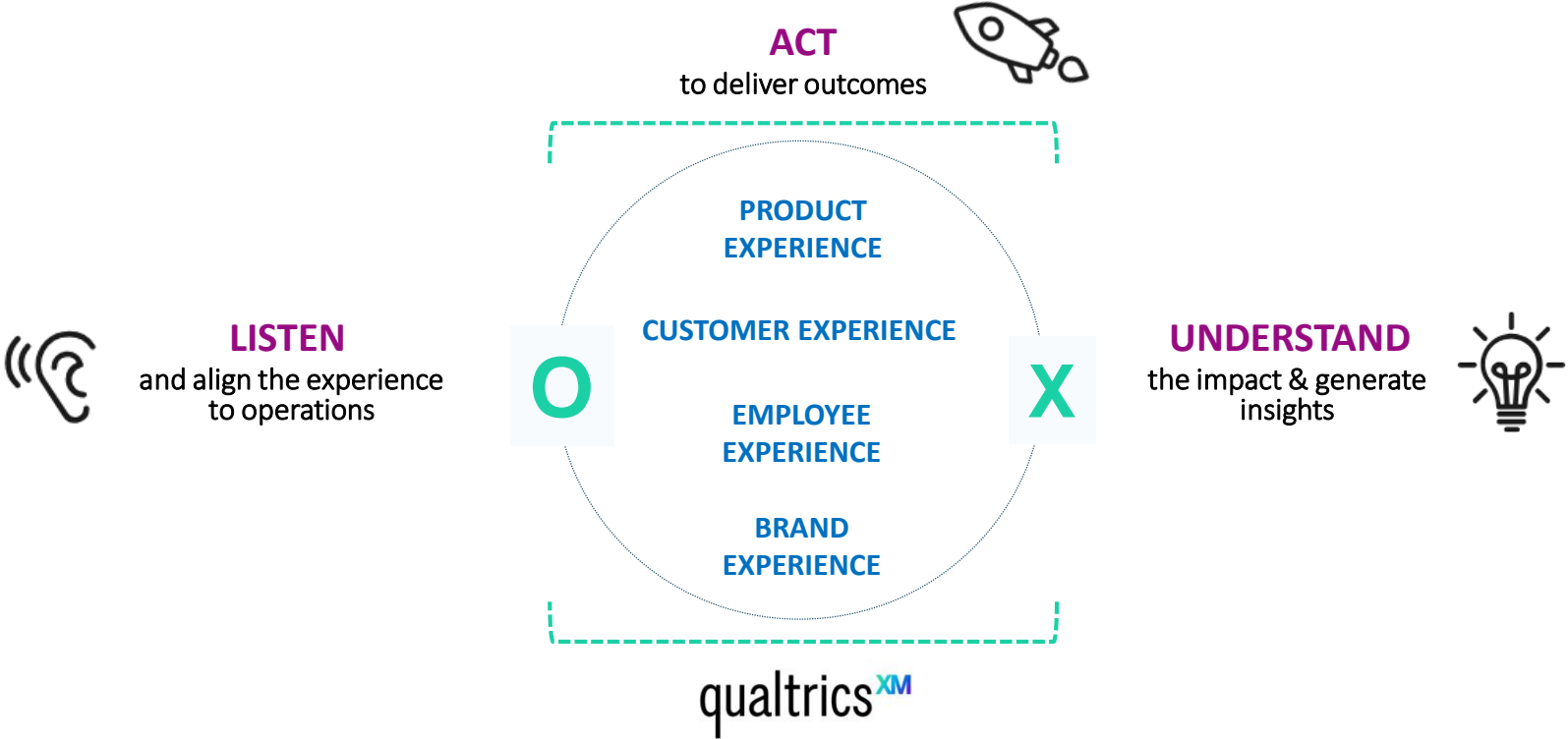
- + Market leader in Experience Management platform (XM)
- + Acquired by SAP in 2019, market leader in operational data (O-data)
- + 20 offices worldwide
- + 2 millions customers in more than 100 countries
- + 75% of Fortune 100 companies use Qualtrics
- + 40 employees in Montréal, Ottawa, Toronto and Vancouver



As of November 2020 © Gartner, Inc

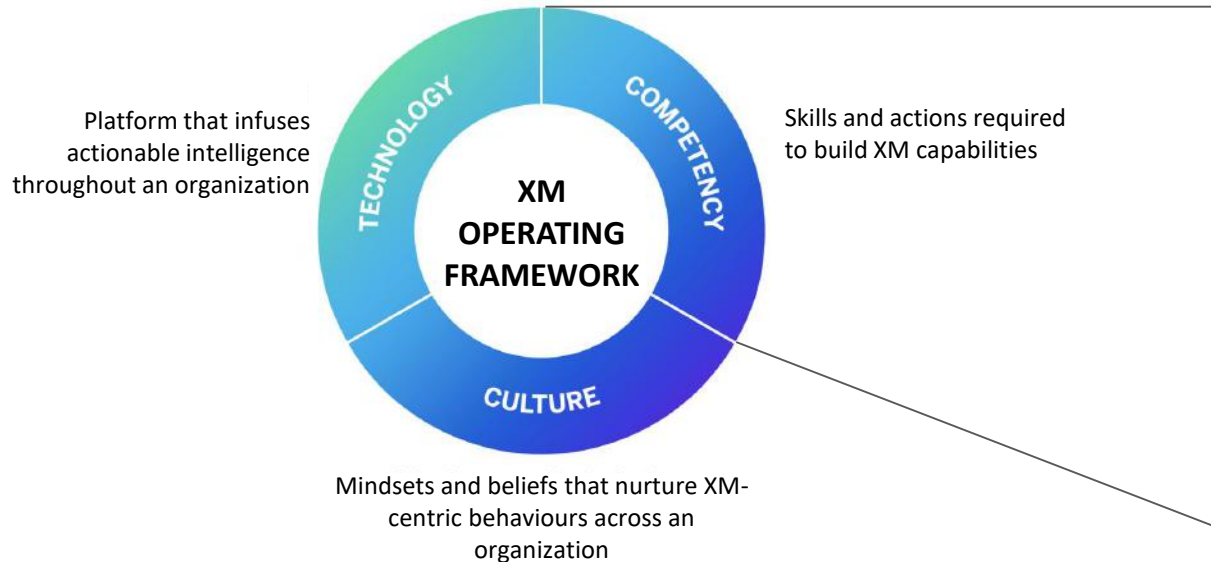
Gartner Magic Quadrant for Voice of Customer (VoC) – November 2020

# ONE SINGLE HUMAN EXPERIENCE MANAGEMENT PLATFORM



# NURTURING AN EXPERIENCE-CENTRIC CULTURE

Qualtrics (formerly the Temkin Institute) will partner with you to consistently develop your XM capabilities.



## SIX XM COMPETENCIES



# We continue to outpace the market and expand globally...

**55%**

YoY growth

**75%+**

of the fortune 100

**126%**

net retention

**3.4K**

employees in  
13 countries

**11.5K**

customers globally

**95%**

enterprise retention

**800+**

engineers and  
growing

**2.6K**

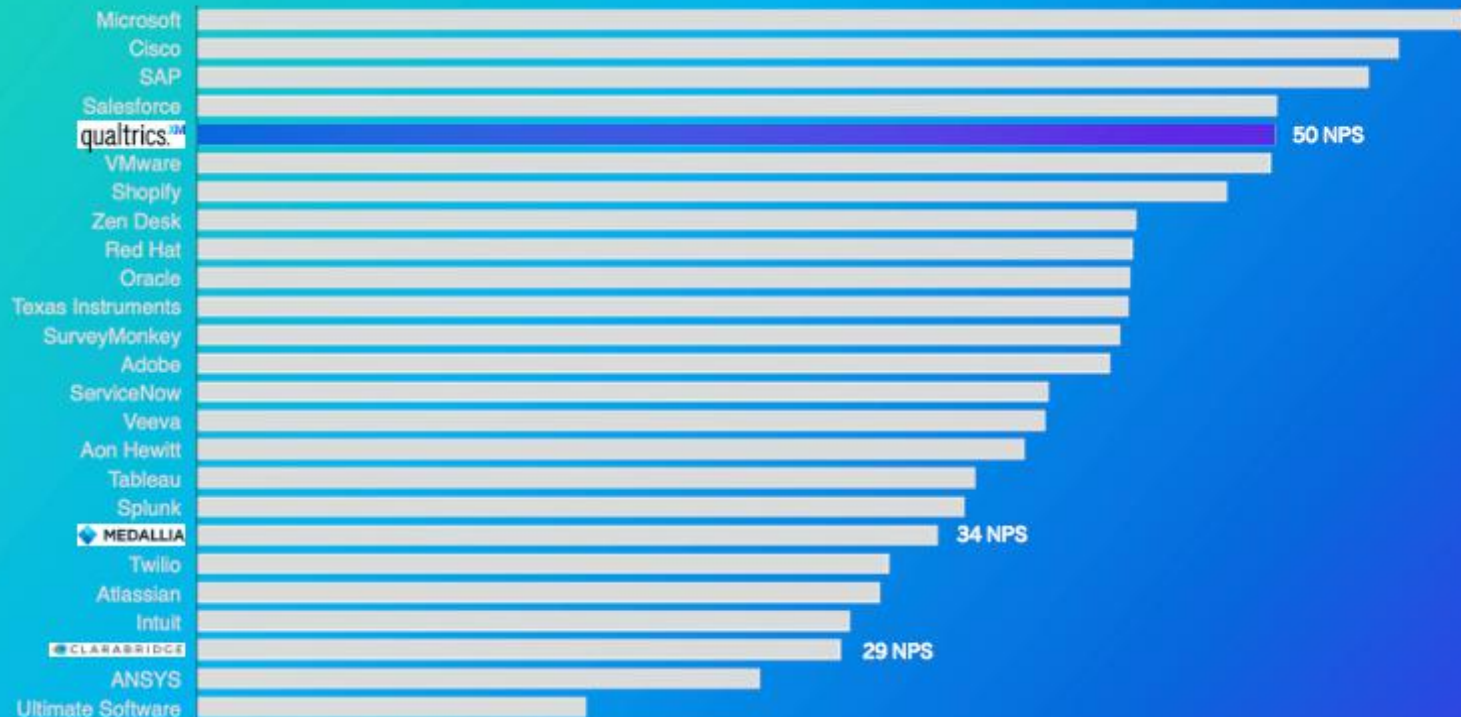
enterprise customers  
in 41 countries

**70+**

languages supported



# ...while delivering market leading NPS



\*Source: Qualtrics commissioned research study conducted by McKinsey



**Leger**  
MetriCX Excellence in CX, research, and analytics professional services

- CX advisory services
- Implementation and configuration
- Managed services



qualtrics<sup>XM</sup>  
**Industry-leading XM platform**

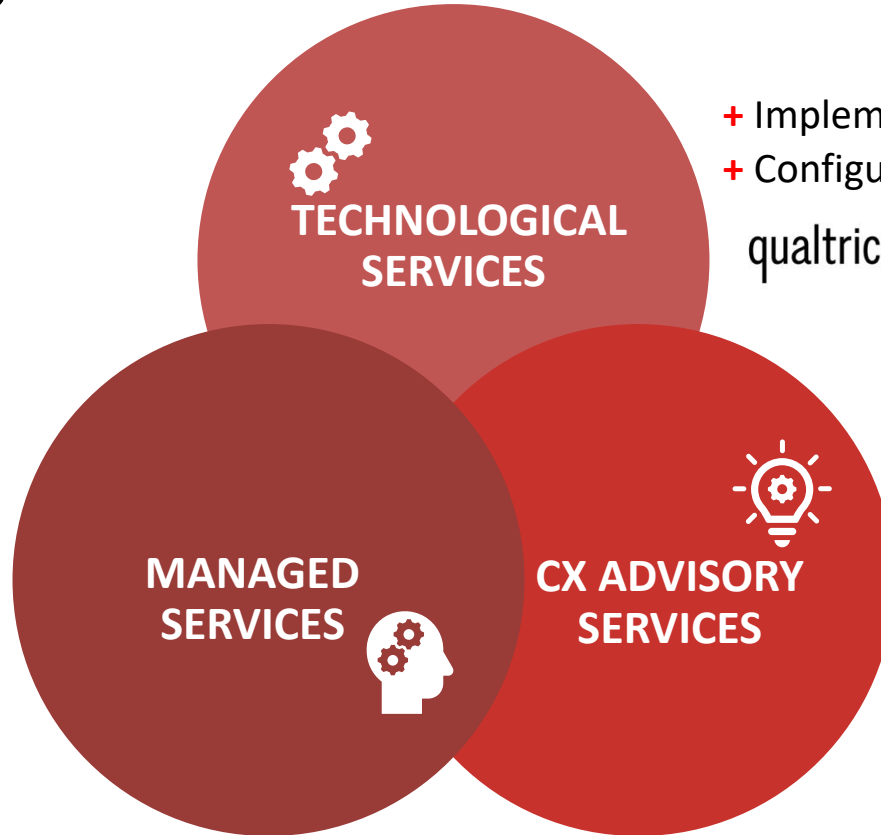
- Licence and features

Partner together to help clients succeed

# OUR SERVICES

Transforming customer experience with tailored advisory services, managed services, and technological services.

- + A la carte services
- + Turnkey services

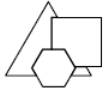


- + Implementation
- + Configuration

qualtrics<sup>XM</sup>

- + Strategy
- + Analytics
- + Operational improvement

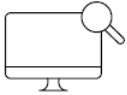
# LEGER'S TEAM IS CX AND QUALTRICS CERTIFIED



## Project Lead/Program Deployment

*Leger Title: Engagement Manager*

Single point of contact for the client, coordinates resources and ensures overall delivery success



## Platform/Configuration Expert

*Leger Title: System Specialist*

Configures platform including survey programming, building dashboards, platform integrations, etc.



## CX Experts

*Leger Titles: VP CX and CX Manager*

Advise on CX strategy, journey mapping, program design, etc.



## Complex Integration Expert

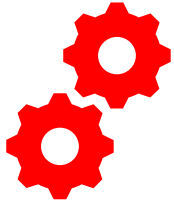
*Leger Title: Solution Architect*

Determines the engineering services needed to achieve the desired results



**CustomerXM**

**CERTIFIED**



## Technology Services

*Implementation and configuration for programs of all sizes, from simple to highly customized deployments*

- + Onboarding planning and scoping
- + Configuring user accounts
- + Creating surveys and dashboards
- + Role-based configuration according to hierarchy
- + Closed-loop configuration
- + Contact list automation and email/SMS distribution
- + Integrations (SSO, SFTP, CRM, etc.)
- + Custom JavaScript survey questions and HTML email templates
- + Custom reporting
- + Data migration and conversion



## Managed Services

*Flexible professional services for end-to-end or turnkey program management*

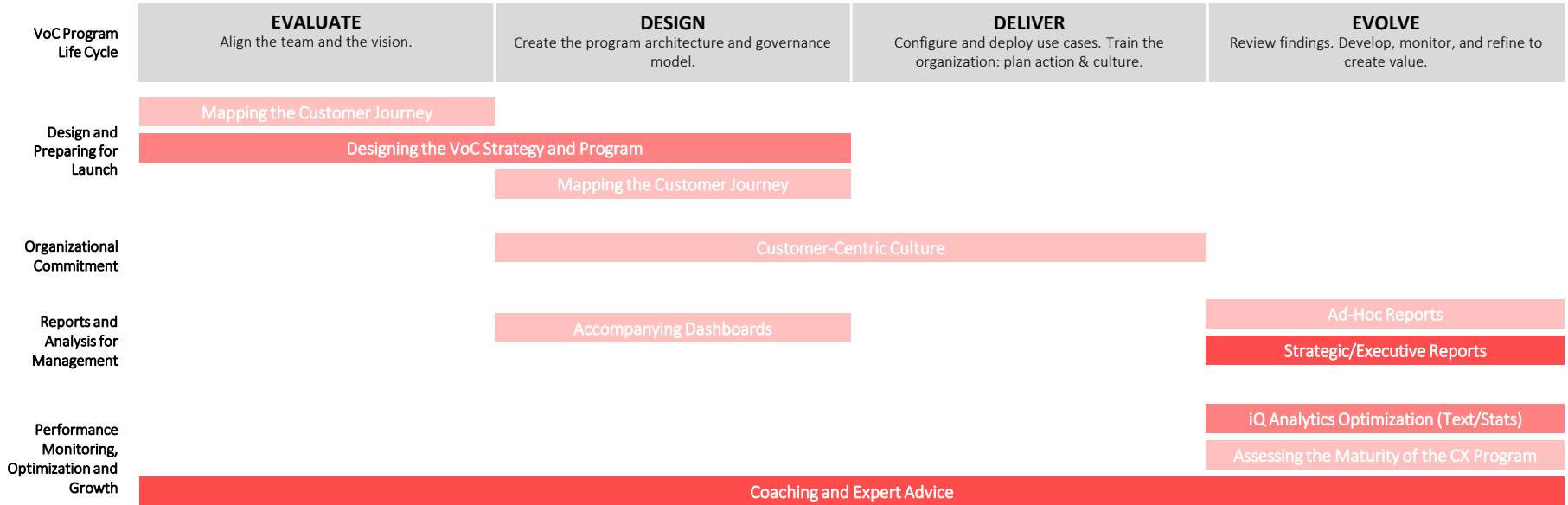
- + Program planning and roadmap
- + CX metrics, KPIs, program objectives
- + Survey and dashboard design
- + Quota management and automation
- + Close-the-Loop design and management
- + Text Analytics management
- + Action planning
- + Survey translation
- + Performance program review and quality control
- + Training





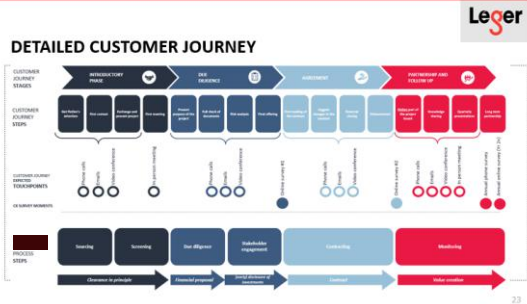
# CX Advisory Services

*Strategic, analytic and operational consulting services to optimize your VoC and CX programs*

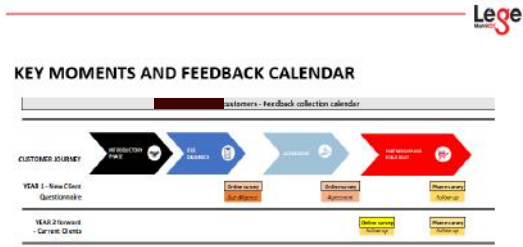




# Consulting CX Service: Designing a VoC System



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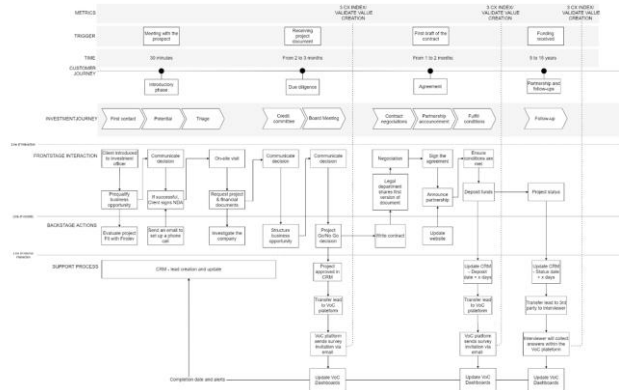


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### OVERVIEW OF THE QUESTIONNAIRES

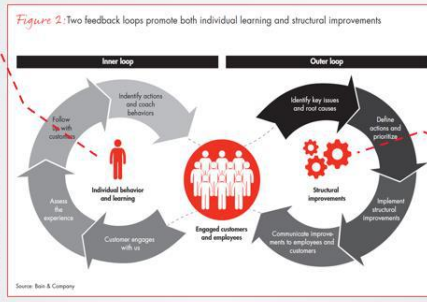
Real-time	Retention	Post-transaction
<b>Online Survey</b>	<b>Online Survey</b>	<b>Phone interview Survey</b>
Overall and moment of truth satisfaction	Overall and moment of truth satisfaction	Overall and moment of truth satisfaction
Net promoter score	Net promoter score	Net promoter score
Ease of doing business with	Expectations vs value attributes - Investment team + Legal team	Ease of doing business with
Expectations vs value attributes - Investment team	Contribution to "gender equity" and sustainable development	Expectations vs value attributes - Investment team + Impact team
Experience vs other Financial Institution	Experience vs other Financial Institution	Explaining scores
What could be done differently to make your experience better?	What could be done differently to make your experience better?	Experience vs other Financial Institution
		What could be done differently to make your experience better?

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## ANALYZING & ACTING : UNDERSTAND & TAKE ACTION

- Should be led by the Operations managers
- Overall performance to be discussed with the investment team - celebrate results; share positive feedback; exchange on challenges best practices.
- Individual performance to be discussed during one-on-one meetings - share personal results; recognize good behaviors; discuss challenges; offer coaching and development opportunities to close gap with expectations, facilitate improvements.
- Frequency = weekly



- Should be led by the CX strategy owner
- Overall results and verbatim to be discussed at the CX governance committee - what are the main drivers of dissatisfaction/improvements opportunities gathered from the VOC surveys? what is the risk, the impact of the CX issue/opportunity? what is the action plan and who is in charge of the follow-up? what is the ROI of the CX improvements?
- Frequency = monthly

Source: Bain & Company

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# INTEGRATED AND FLEXIBLE APPROACH

*We build it with you*

**Joint implementation**  
to empower clients to take action  
independently

**Guided**

*We build it for you*

CX strategy design +  
deployment support

**Advanced Turnkey  
Deployment**

*We run it for you*

Customized solution to optimize the  
CX program on a continuous basis

**Turnkey Deployment Including  
Continuous Advisory and  
Managed Services**



Client autonomy

Turnkey solution

# Leger

*We know Canadians*

