



QUALTRICS

Sales Technology Audit & Virtual Engagement

AMIGOS -SFM TEAM 4

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Executive Summary

In this project, we briefly demonstrated the importance of customer management and research. Then, evaluated the efficiency and inefficiency of Qualtrics XM in Sales Organization 3.0. Then we listed the market demands for Qualtrics to improve. We compared Qualtrics with Wix Answers, Zendex, and TeamSupport and made a SWOT analysis for Qualtrics.

We identified Qualtrics XM as an important player in its market and made a relevance analysis for Qualtrics and its competitor. For 4 attributes including training, customer support, safety, and employee engagement, Qualtrics has higher relevance level than the average.

Finally, we provided three recommendations for further development: 1) 3 Levels of Solutions; 2) Live Chat; 3) Mobile Platform. Based on these improvements, we also discussed the barriers Qualtrics should have to prevent new entrants and the switching cost for new users.

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Sales Organization Evaluation

Top Alternatives to Qualtrics Core XM

- Wix Answers
- Team Support
- Zendesk
- Freshdesk
- SurveyMonkey
- Typeform
- Formstack
- Zoho Survey

→ Effectiveness

- ◆ Professional
- ◆ Customer support
- ◆ Customizable system
- ◆ Informative

→ Ineffectiveness

- ◆ User-Friendly
- ◆ Platform
- ◆ Compatibility



Customers Needs & Expectations

- More customer reports
- Reporting options
- Flexibility in the background template
- Group editing feature
- Feature of automatically draft saving



Turn customers into fanatics

Get feedback from customers at every meaningful touchpoint, analyze their comments to know what to do, then take action on the things that deliver measurable impact.

WATCH DEMO

Main Competitors Analysis



Wix Answers

by Wix Answers

★★★★☆ 4.6/5 (19) [Write](#)

- Best For mid-market and enterprise
- Pricing starts at \$80 per month, per user.No free trial
- No predictive,sentiment, &text analysis



Zendesk

by Zendesk

★★★★☆ 4.3/5 (2302)

- Fortune 500 companies; over 200,000+ customers
- Pricing starts at \$5 per month, per user.
- No free trial



TeamSupport












by TeamSupport

★★★★☆ 4.5/5 (754) [Write](#)

- All-in-one support solution
- Pricing starts at \$50 per month, per user.Offer free trial.
- No negative feedback management

Main Competitors Analysis

	Good
	Normal
	Bad

Attributes	Quatrics	Wix Answers	Zendesk	TeamSupport	Pipedrive	Freshdesk	Zoho CRM	Survey Monkey	AVERAGE
Ease of Use / 7	6.16	6.44	6.02	6.16	6.44	6.3	5.6	6.44	6.2
Real time collaboration	6.5	6.4	6.28	5.5	6.2	6	5.9	6.3	6.1
Worldwide	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	
Timely feedback	Live Rep& Online	Live Rep	Live Rep& Online	Online	Live Rep& Online	Live Rep& Online	Live Rep& Online	Live Rep& Online	
Price	\$1500/yr (personalized)	\$80.00/month/user	\$5.00/month/user	\$50.00/month/user	\$15.00/month/user	\$15.00/month/user	\$12.00/year/user	\$25.00/month	
Value for money / 7	6.3	6.02	5.74	6.16	6.3	6.16	5.88	6.3	6.1
Training	YES	YES	YES	YES	YES	YES	YES	YES	
Customer Support / 7	6.58	6.3	6.02	6.3	6.16	6.44	5.6	6.16	6.2
Workplace safety	7	7	7	7	7	7	7	7	7.0
Employee Engagement	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>					<input checked="" type="checkbox"/>	
Deployment/Platforms									
									
Ideal number of Users	1-1000+	10-1000+	1-1000+	2-1000+	1-499	2-999	1-1000+	1-1000+	
Predictive Analytics	YES	NO	YES	YES	YES	YES	YES	YES	
Sentiment Analytics	YES	NO	YES	YES	NO	NO	YES	YES	
Text Analytics	YES	NO	YES	YES	YES	NO	YES	YES	
Customer Segmentation	YES	YES	YES	NO	YES	YES	YES	YES	

SWOT Analysis

Strength

- Multi Platforms, Multi Functions
- Customer experience Mgt
- Both Online & in person training

Weakness

- Technical issue support
- Flexible Features
- Relatively high price

Opportunity

- Population growth - potential customers
- Business organization increasing needs
- IT development

Threat

- Increasing competitors
- High cost on continuously upgrading
- Customer Loyalty/Unsustainable

Feature Analysis

→ In Digital Sales Transformation Pillars/Levels

◆ Sale 3.0 (Tech to People)

→ In Vendor Neutral Frameworks

◆ Sell More & Again

(Customer Experience & Engagement)

◆ Why Buy & From You

(Buyer Consensus Value)

qualtrics[®] XIM

Identify Technology Gaps

	White Belt	Blue Belt	Purple	Brown Belt	Black Belt
Develop, Coach, Onboard & Motivate	Face-to-Face Training	Sales Training Portal (Skills Dev)	Skills Development & Reinforcement, Gamification	Video Role Play, (Skills Dev)	Sales Call Recording (Conversation Intel)
Manage, Forecast & Analyze	Spreadsheets	CRM	Sales Compensation Planning & Admin'	Forecast Analysis Reporting (AI)	Territory Management
Sell More & Again	Spreadsheets	CRM	Customer Experience & Success	Customer Engagement	Revenue Management Renewal Management
How to Close	Spreadsheets Documents Email	eSignatures Proposal Creation	Configure, Price, Quote (Pricing Analytics)	Account & Opportunity Planning/Mgmt	Sales Process & Activity Mgmt (Account/Opp) Contract Life-Cycle Mgmt
Why Buy & From You	PowerPoint*	ROI Calculators (Value Management)	Buyer Consensus Value Selling	Reference Management	Channel/Distributor Management
When & How to Engage	Phone & Email Online Meeting	Meeting Schedulers PowerPoint * Outreach Cadence	Sales Prospecting & Engagement Presentation Builders	Sales Enablement Video Selling Personalization/Social Tactile Selling	AI Email Outreach Buyer Portals AI Mtg Note Taking
Who to Sell to & Why	Internet Search Lead Clipping	Lead List Building Web Visitor Tracking	Call-Back Lead Capture Email Auto-Reply Mining	Account Targeting/GTM Intent Lead Scoring	Database Cleanse/Append

Feature Analysis

Qualtric Attributes	Offered by /8	Market Availability	Difference Score	Scaled to 7	Importance Score/7	Difference Score/7	Relevance Score (I x D)	Differentiating Attributes	About Smartick
Ease of Use	6	75%	25%	1.75	7	1.75	12.25	FALSE	
Real time collaboration	6	75%	25%	1.75	6	1.75	10.5	FALSE	
Worldwide	5	63%	38%	2.63	4	2.63	10.5	FALSE	
Timely feedback	7	88%	13%	0.88	5	0.88	4.375	FALSE	
Price	5	63%	38%	2.63	6	2.63	15.75	FALSE	
Training	8	100%	100%	7.00	5	7.00	35.0	TRUE	****
Customer Support	4	50%	50%	3.50	6	3.50	21.0	TRUE	**
Workplace safety	8	100%	100%	7.00	6	7.00	42.0	TRUE	****
Employee Engagement	4	50%	50%	3.50	7	3.50	24.5	TRUE	***
Deployment/Platforms	4	50%	50%	3.50	4	3.50	14.0	FALSE	
Ideal number of Users	6	75%	25%	1.75	4	1.75	7.0	FALSE	
							17.9	TRUE= >AVG	

Feature Analysis

Attributes	Relevance Score (I x D)	Differentiating Attributes	About Smartick
Ease of Use	12.25	FALSE	
Real time collaboration	10.5	FALSE	
Worldwide	10.5	FALSE	
Timely feedback	4.375	FALSE	
Price	15.75	FALSE	
Training	35.0	TRUE	****
Customer Support	21.0	TRUE	**
Workplace safety	42.0	TRUE	****
Employee Engagement	24.5	TRUE	***
Deployment/Platforms	14.0	FALSE	
Ideal number of Users	7.0	FALSE	
	17.9	TRUE= >AVG	

High Relevance

Training

Customer Support

Safety

Employee Engagement

High Importance

Ease of use

Collaboration

Price

Customer Support

Safety

Employee Engagement

High Difference

Customer Support

Employee Engagement

Improvement Analysis

3 Levels of Solution Package

Basic	Advanced	Professional
Basic Solutions including... OR Up to 3 Solutions	Advanced Solutions including... OR Up to 6 Solutions	Unlimited Solutions

» Barriers to Entry

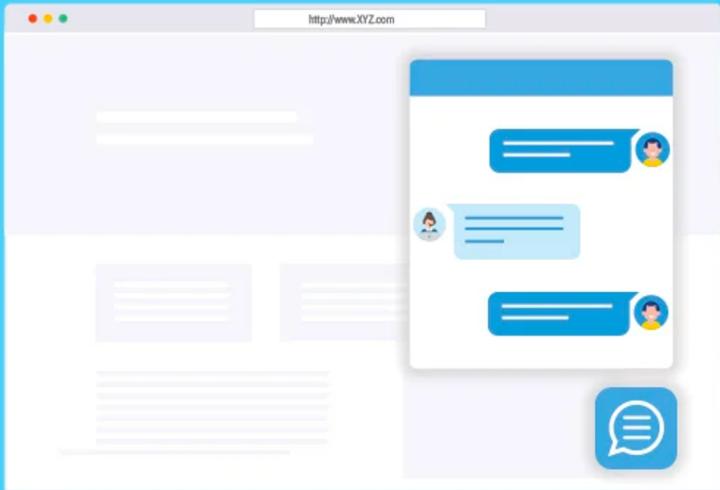
- ◇ Small (modification on IT and new pricing)

» Switch Cost

- ◇ Original users must choose a plan,
- ◇ Give up certain technologies for lower price

Improvement Analysis

Live Chat



- » **Barriers to Entry**
 - ◇ Medium (human capital & IT)
- » **No Switch Cost**

Improvement Analysis

Mobile Platform



» Barriers to Entry

- ◇ Medium (IT support & financial capital)

» No Switch Cost

Thank You!
Q&A

