

CX Account Management: Details

PRICE: \$9,000

PROJECT LENGTH: 12 weeks

INCLUDES:

✓ Project Management	✓ Dashboard Configuration
✓ XM guided Solution and Solutions Playbook	✓ API Introductory Support
✓ Closed Loop Follow-Up Configuration	✓ Action Planning Configuration
✓ B2B Command Center Support	✓ Text iQ Configuration
✓ CRM Integration Support	✓ XM Directory Support
✓ Survey Configuration	✓ XM Directory Automation Support

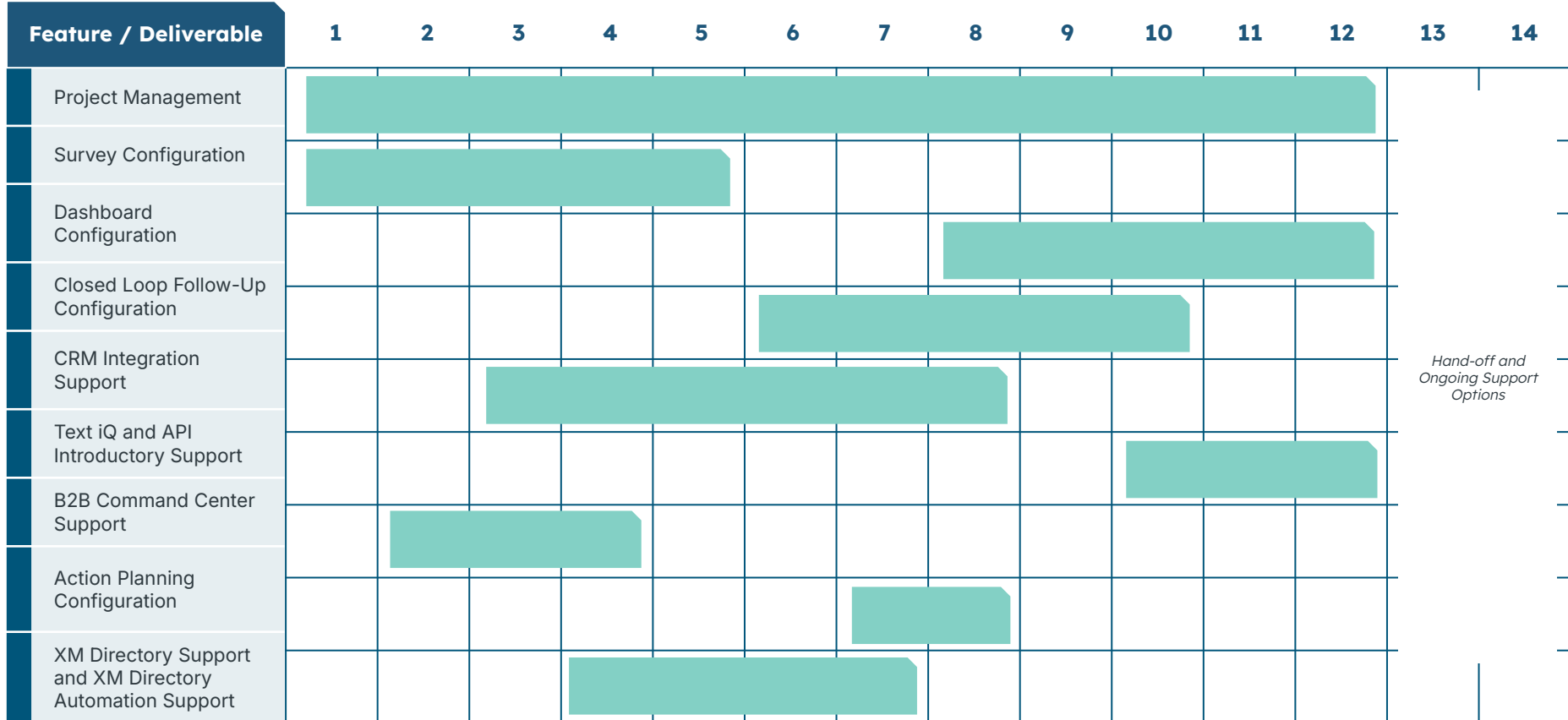


CX Account Management is a dynamic solution tailored to meet the intricate demands of B2B accounts. In the realm of B2B relationships, success extends far beyond the initial transaction; it's about orchestrating a seamless and value-driven customer journey. Account Management is the catalyst for elevating revenue and bolstering retention through strategic actions.

By seamlessly integrating CRM customer profile data with client feedback, Account Management provides a consolidated view that illuminates the entire customer landscape. This perspective allows teams to navigate the complex B2B terrain with precision, ensuring that every action is informed by a nuanced understanding of client expectations.



CX Account Management: Sample Timeline



Hand-off and Ongoing Support Options

Red Pepper is your #1 choice for Qualtrics Implementations and Customizations

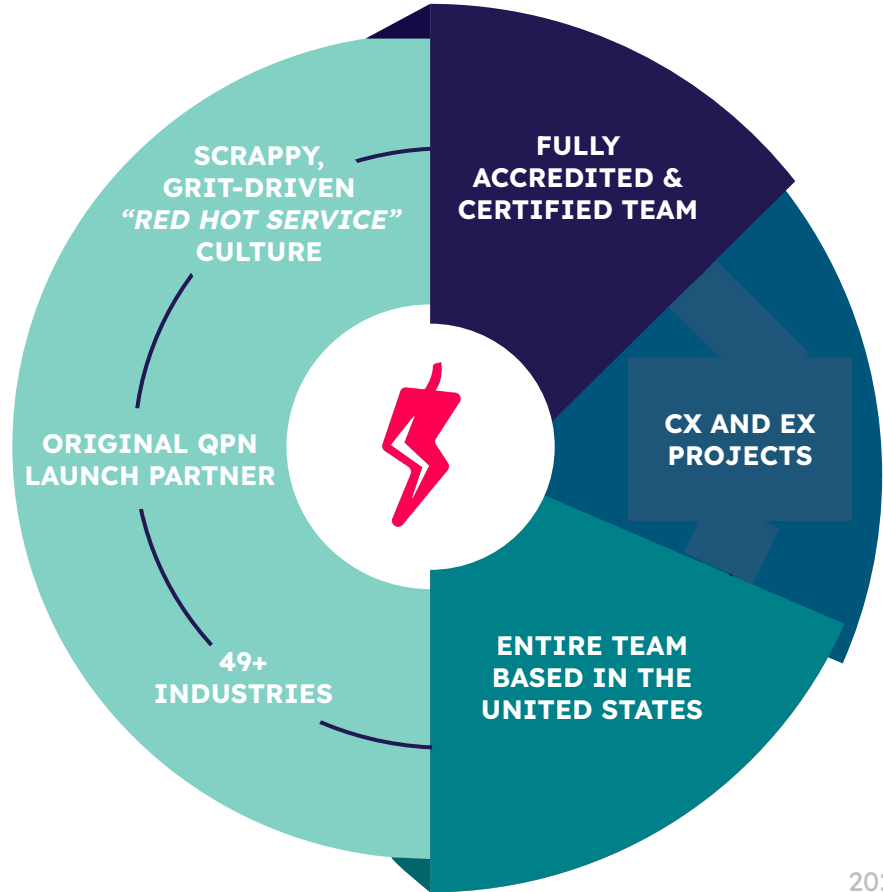
*We may not be the largest Qualtrics partner by square feet of office space, but our unique combination of client focus and technology skills often makes us **the fastest, easiest, and most experienced** partner to work with.*



We have been doing CX and EX with Qualtrics from the beginning

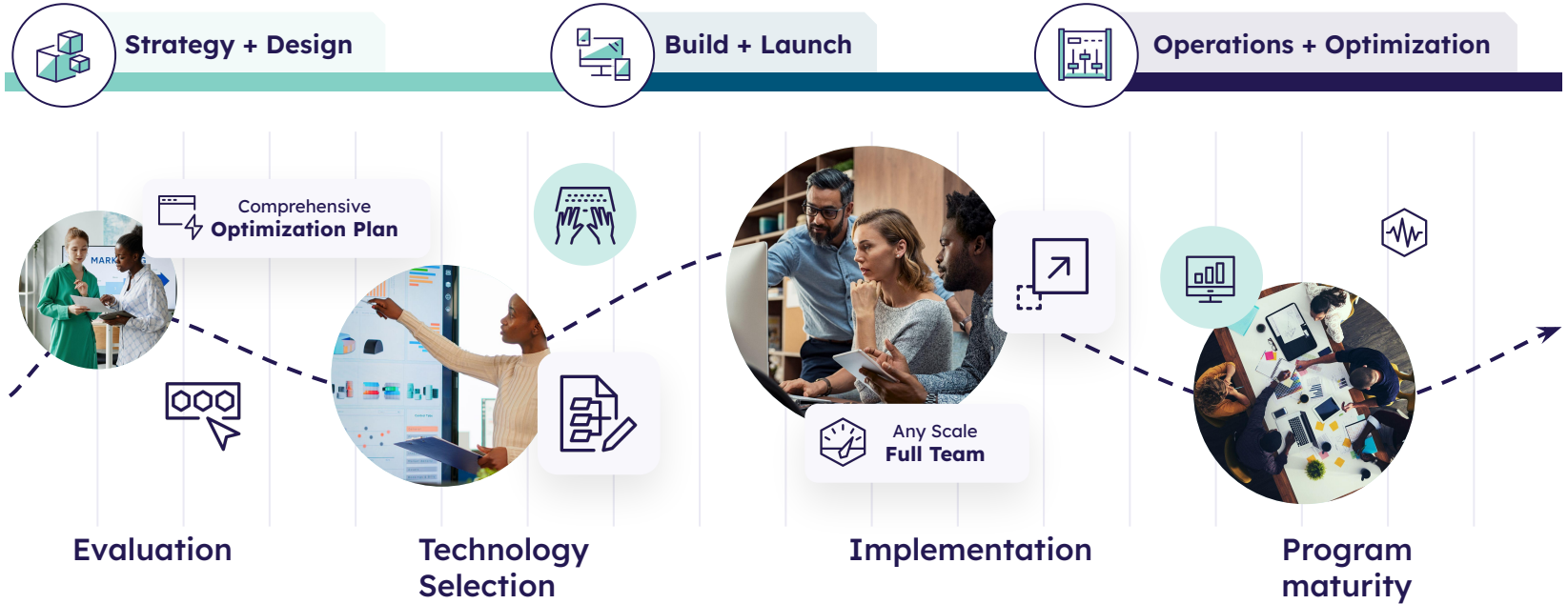
Clear communication, shared time-zones, fast response times

We've successfully handled 100's of use cases and customizations



Our Approach

We're not just here for the build—we're here for the life of XM programs



What Is “Implementation” ?



The beginning of a Qualtrics engagement is called Implementation. Even if you have your own internal IT team, you will benefit from an Implementation project. It's more than just getting logged in. We help you get through your first Qualtrics project from start to finish.

What will the timeline and milestones look like?

A typical Implementation can take between 8 to 12 weeks. During this time, you will meet with an “Implementer” on our team each week over a video call. They will guide you through the process of setting up your account and implementing the elements of your first project.

We have helped hundreds of Qualtrics clients customize their projects and helped their teams become confident in using the platform.

What are your responsibilities during the process?

Our goal is to do the heavy lifting and make the technical side of Qualtrics easy for your team, but you and your team are key to your project's success.

We follow a “train the trainer” philosophy on these projects. Our objective is to work with you so that at the end of Implementation you're becoming a skilled Qualtrics user yourself.

What can you expect the results of your Implementation to be?

At the end of your 8-12 weeks, our goal is for you to have a complete “win” under your belt with Qualtrics.

You'll be up-and-running, collecting data, and ready to use that data within your organization to create better experiences for your customers or members.

Your Commitment

What's Required of the customer team

- Attend a weekly one hour zoom working session with us, with homework in between which averages 1-3 hours. Plan to invest 1-4 hours a week in this for 12 weeks.
- Generally speaking we just need the Qualtrics users in the working sessions, but when we do the XM automation training we will need the IT team in that session. We provide advance notice of when that meeting will be so you can make sure your IT team has the time.
- We provide you a project plan that will be updated and sent to you weekly. It let's you know the status of each deliverable/training and the target dates for starting and completion. It also contains the agendas for each meeting.
- With your permission we record each working session and turn the videos over to you so that anyone that couldn't make it can review at their convenience. It is also nice to have when you are working independently of Red Pepper.

SFTP Automation

What is SFTP? And when is it a good choice?

Secure File Transfer Protocol (SFTP) is a hosted server, that acts as a safe folder for data to be sent to from different applications.

All SFTP is also encrypted. It is often used to send larger sets of data that do not need to be processed right away. SFTP connections can be quick too, but they are typically set up to occur on set schedules so they rely less on speed than an API Integration does.

Red Pepper offers a complete SFTP Solution, including setup and annual hosting. We have managed SFTP Automations for more than 15 years.

When to choose SFTP Automation:

Choose SFTP when you need to send large amounts of information securely for later processing, once an hour, once a day, or once a week. For example, sending a big weekly report.

SFTP Automations are best for when consistency and safety are more important than speed. They are ideal for bulk data updates to collect, store, and later analyze data. They are very flexible for internal IT teams to work once established.

Red Pepper and Qualtrics combine to create a complete solutions team

*Get the most out of Qualtrics by bringing Red Pepper on board to create a complete solutions team. Together with Qualtrics we can **implement, customize, and train** your team on every aspect of the XM Platform*



IMPLEMENTATION LEAD

TECHNICAL SUPPORT

ACCOUNT EXECUTIVE

SUBJECT MATTER EXPERTS



SOFTWARE ENGINEERS

PLATFORM TRAINING

CUSTOMER SUCCESS

Our Approach: Train the Trainer

We employ a “train the trainer” approach, meaning that your team works alongside our team while we implement, so you can learn from what we’re doing.

Our goal is that your team will become experts at using Qualtrics, but while you’re learning, you’ll have our team to rely on.



Red Pepper's team elegantly scales from lean support, to turn-key, to 'secret weapon'

Red Pepper has every level of implementation package available, **from lean technical assistance to complete program management** or staff augmentation.

Whether you have a one-time need or are looking to setup an ongoing XM campaign, **we can configure the right size and term for a solution team** to get the results you're after.

SELF-DIRECTED, RED PEPPER ASSISTED

- ✓ Standard Implementation
- ✓ Basic platform training
- ✓ Support during project
- ✓ Client team inputs the data

FULL SERVICE IMPLEMENTATION

Everything in Self-Directed +

- ✓ Red Pepper inputs the data
- ✓ Technical customizations
- ✓ Reporting and Dashboards

FULLY-MANAGED RED PEPPER SOLUTION

Everything in Self-Directed and Full Service +

- ✓ Ongoing technical support and expertise
- ✓ Campaigns and multi-survey programs
- ✓ An entire XM team for less than one FTE

Thank You!

 RedPepper + qualtrics.XM



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Connect with us on Slack:
[#ext-redpepper-qualtrics](#)