



Navigator
by Medallia

Course Catalog



Medallia |  EDUCATION
& ENABLEMENT

At the heart of every successful organization are people. Equip your people with the skills they need to achieve your organization's strategic Experience goals. Medallia training professionals have extensive experience partnering with organizations and are committed to learner success and engagement.

Our Education Experts can:

- Provide targeted course recommendations for individual roles
- Create focused training plans to support upcoming projects
- Deliver highly engaging and relevant training across geographies and modalities

To talk with us about your organization's training needs, email edsales@medallia.com.



GLOSSARY OF TERMS

Badge - Earn a badge recognizing your knowledge and skills in Medallia products and features. Badges are supported through Credly and can be shared on LinkedIn and other social sites.

Learning Path - A series of courses sequenced together to address a large topic or concept.

Course - Focused content covering a specific topic.

Lessons - Within a course, content is divided into lessons. Lessons are short, online, self-paced materials, allowing learners to explore the larger topics in smaller pieces.

Medallia Admin - Medallia Admins may be responsible for different parts of the MEC environment! From Survey administration to Reporting, to setting up the MEC Organization, creating Digital forms, or maintaining Text Analytics.

Medallia Professional - Medallia Professionals use and require data from MEC to glean insights and develop actions. Medallia Professionals may advise on program design and function but do not administer the MEC platform.

Micro-Learning - Short conceptual and platform videos, configuration steps, and job aides to enable Medallia Admins on the go.

NEW AND UPDATED COURSES AND LEARNING PATHS

Medallia Admins may be responsible for different parts of the MEC environment! From Survey administration to Reporting to setting up the MEC Organization, creating Digital forms, or maintaining Text Analytics. Learning Paths are a curated series of courses geared toward helping Admins and other professionals learn and understand a specific area of MEC.

Explore these new and updated courses and learning paths!

UTILIZING THE QUERY API TO BUILD APPLICATIONS

Acquire the foundational knowledge and tools you need to build applications that integrate with the Medallia Query API. This learning path ensures you understand the journey of an email-to-web record in Medallia, are capable of implementing OAuth 2.0 authentication in your solutions, and understand restrictions and permission-based access for the Query API. Upon completion, you will be able to leverage GraphQL schema introspection to create queries for retrieving Experience Program metadata, aggregate data, and record-level data from Medallia signals.

(3hrs 30 mins)

CONFIGURING AD HOC SURVEYS AND VIEWING RESULTS

With Ad Hoc Surveys, you can quickly create one-off surveys, distribute them to your survey takers, and view the results within MEC. Learn how to quickly configure surveys and emails, then easily view and share reports for your Ad Hoc Survey responses. Complete the two-part final exam to earn the Ad Hoc Survey Configuration Specialist badge!

(2 hours 30 mins)

MEDALLIA RESOURCES

Have you been curious about what resources you need on your Medallia journey? Support, Navigator, Medallia User Groups? We got you covered! Check out these short videos geared towards helping you learn about these important Medallia resources

(15 mins)

EXPLORING CORE DXA FUNCTIONALITY

Medallia Digital Experience Analytics (DXA) impacts how you interpret your data, presents meaningful insights into how users are experiencing your site, and makes recommendations that improve visitor conversion and experience on your websites and apps. This learning path enables you to leverage DXA to improve the usability of your websites.

(40 mins)

LEARNING THE FUNDAMENTALS OF EMPLOYEE EXPERIENCE

A solid understanding of engagement—specifically employee engagement—builds a firm foundation for comprehending employee experience (EX). This learning path provides you with the opportunity to learn about Medallia's approach to employee engagement and experience and the connection between EX and CX without diminishing the important differences between these two types of feedback programs.

(1hr 30 mins)

FEATURED BADGES

Medallia offers a variety of badges allowing you to prove and showcase your skills and competencies with Medallia products. Each badge listed below is tied to a learning path consisting of courses and an exam used to demonstrate your understanding of the information presented. Badges are offered through Navigator and supported by Credly, an industry expert in badging, allowing you to share your badges on various platforms, such as LinkedIn and X.

PRACTITIONER BADGES

Practitioner badges focus on fundamental understanding and applying best practices when designing and using Medallia products.



Closed-Loop Practitioner

Earners of the Closed-Loop Practitioner badge understand the key elements of the Closed-Loop framework and can identify key components of alert configuration.



Journey of a Record Practitioner

Earners of the Journey of a Record Practitioner badge have demonstrated their understanding of how signal data comes into MEC via four main journeys and how the records are updated through the journey stages.



MXO Practitioner

Earners of the Medallia Experience Orchestration Practitioner badge have demonstrated their understanding of Medallia Experience Orchestration.



Reporting Design Practitioner

Earners of the Reporting Design Practitioner badge have demonstrated the ability to identify and implement reporting design best practices.



Survey Design Practitioner

Earners of the Survey Design Practitioner badge have demonstrated the ability to identify and implement survey design best practices.



Text Analytics Insights Practitioner

Earners of the Text Analytics Insights Practitioner badge have demonstrated the ability to gather valuable insights from Text Analytics Topics and Themes.

SPECIALIST BADGES

Specialist badges focus on the application of techniques to configure and manage Medallia products.



Ad Hoc Configuration Specialist

Earners of the Ad Hoc Survey Configuration Specialist badge have demonstrated the ability to create, distribute, and view results for an Ad Hoc Survey.



Medallia Digital Configuration Specialist

Earners of the Medallia Digital Feedback Configuration Specialist badge have demonstrated the ability to create a Medallia Digital Feedback form/survey and launch the form across your online presence.



MXO Specialist

Earners of the Medallia Experience Orchestration Specialist badge have demonstrated the ability to configure the MXO platform, including the common vocabulary and system architecture.



Survey Configuration Specialist

Earners of the Survey Configuration Specialist badge have demonstrated the ability to configure, test, and launch surveys using Admin Suite Surveys.



Translations Configuration Specialist

Earners of the Translations Configuration Specialist badge have demonstrated the ability to configure translations for surveys, emails, reporting, and organizational hierarchies using MEC Admin Suite Translations.



Users and Roles Configuration Specialist

Earners of the Users and Roles Configuration Specialist badge have demonstrated the ability to create and manage users and roles to have appropriate data access and permissions.

DEVELOPER BADGES

Developer badges focus on the use of Medallia APIs to build applications that connect to the Medallia Experience Cloud.



MEDALLIA QUERY API DEVELOPER

Earners of the Medallia Query API Developer badge have acquired foundational knowledge and tools to build applications that integrate with the Medallia Query API. They understand the journey of an email-to-web signal record, are capable of implementing OAuth 2.0 authentication, and understand restrictions and permission-based access for the Query API. Earners leverage GraphQL schema introspection to create queries for retrieving Experience Program metadata, aggregate data, and record-level data.

TOPIC SPECIFIC LEARNING PATHS

Explore Learning Paths focused on additional topics and areas of the MEC platform.

Getting Started with Medallia

(2 hours)

Getting Started with Medallia learning path is an immersive, scenario-based curriculum that shows you how MEC supports various employee roles – from Contact Center agents to executives—to power and optimize the customer experience operations for Springboard Inc., a fictional organization. In the courses, you work alongside Springboard's employees to learn the hows, whats, and whys of the MEC solution.

To complete the learning path, you need to finish the following courses:

- *Introducing Springboard and this Program*
- At least two (2) of the employee courses
- *Finishing Up*

Configuring the Medallia for Salesforce App for the SFDC Admin

(2 hours)

Are you a SFDC Administrator responsible for configuring the Medallia for Salesforce App? Learn about the App and how to configure the App in order to leverage the voice of the customer and closed-loop feedback to extend the capabilities of both Salesforce Sales and Service Clouds. Note: This learning path explores introductory information about the App, installing and configuring the App, and leveraging the App within Salesforce.

Gathering Insights using Text Analytics

(90 mins)

Are you part of an Insights team needing to understand how Text Analytics (TA) can help you uncover trends, root causes, and impacts from your unstructured data? Do you need to understand how to manage and configure your TA program? Explore this learning path to get to know Text Analytics, understand how to manage your program, and gather insights.

Program Design for Closing the Loop

(1 hour)

Closing the loop describes the process by which an organization takes action on customer feedback. The inner closed-loop enables an organization to answer customer feedback in a timely fashion to resolve customer problems, acknowledge follow-up requests, and collect feedback from passive and promoter groups. The outer closed-loop leverages customer feedback to improve business processes and products, as well as gain insight into business issues. Explore the inner and outer closed-loops in this learning path.

Program Design for Reports

(2 hours)

When designed well, MEC Reporting offers a powerful way to deliver actionable feedback to drive insights and derive actions for your end-users. When creating your reports, it is vital to apply design techniques and strategies to create useful and usable reports. Explore best practices related to Reporting Design and apply UI/UX design principles to your MEC Reports.

Program Design for Surveys

(90 mins)

When designed well, MEC Surveys are a powerful way to receive actionable feedback to drive insights and derive actions for your program. When creating your surveys, it is vital to apply design techniques and strategies to create useful and usable surveys. Explore best practices related to survey design and apply these practices to your surveys. Complete the final exam to earn the Survey Design Practitioner badge!



COURSES FOR MEDALLIA PROFESSIONALS

Featured content for Medallia Professionals enables you to understand the Medallia software environment.

Core Platform

Explore the core areas of the Medallia Experience Cloud platform.

- Getting Started with Medallia
- Admin Concepts - Journey of a Record Overview

Change Management

Learn about Experience Change Management and explore a strategy for implementing an initiative.

- Thought Leadership - Introducing Experience Change Management
- Thought Leadership - Preparing for an Experience Change Management Initiative
- Thought Leadership - Evaluating an Experience Change Management Initiative
- Thought Leadership - Establishing a Communications Plan
- Thought Leadership - Establishing a Training Plan

Employee Experience

Build your understanding of employee experience (EX) and the connection between EX and CX.

- EX Fundamentals - Understanding the Basics of Employee Engagement and EX
- EX Fundamentals - Learning the Basics of Engagement at Medallia
- EX Fundamentals - Learning the Basics of Employee Experience at Medallia
- EX Fundamentals - Understanding the Connection Between CX and EX

Reports

Reports are tools that help us interpret data to drive decisions and actions.

- Reporting - Getting to Know Reporting
- Reporting - Using the Medallia Mobile and Voices Apps
- Reporting - Exploring the In-Dashboard Integrated Report Editor

Social

Use Medallia Social to collect and track public feedback from various sites and display it within MEC.

- Social - Get to Know Medallia Social
- Social - Medallia Social in the Customer Journey

Digital

Medallia for Digital gathers feedback from your digital channels, specifically web, mobile, and connected devices.

- Digital - Introducing Medallia for Digital

Medallia Concierge

Medallia Concierge is an enterprise messaging platform that enables businesses to communicate with customers via text and other mobile messaging channels for instant, on-demand customer service.

- Medallia Concierge - Introducing Medallia Concierge

Salesforce

Understanding your customer's operational, transaction, and experience data helps you gain insights into your customer relationships and drive closed-loop feedback actions.

- Salesforce - Getting to Know the Medallia for Salesforce App

Medallia Experience Orchestration

Medallia Experience Orchestration (MXO) is a unifying technology layer that listens, understands, and orchestrates customer journeys to enhance engagement over time.

- MXO - Engaging for a Changing World

Medallia Video Foundations

Medallia Video allows you to capture, analyze, and share video, audio, and images to provide rich insights and bring the customer voice to life.

- Medallia Video - Implementing Medallia Video Insights Suite
- Medallia Video - Implementing Medallia Video Experience Edition

Text Analytics

Medallia Experience Cloud Text Analytics helps you understand the “why” behind the numeric score.

- Text Analytics - Getting to Know Text Analytics
- Text Analytics - Gathering Insights from Text Analytics

Program Fundamentals & Thought Leadership

When well-designed, Medallia products and processes help provide reliable and actionable feedback to drive continuous experience improvements.

- CX Fundamentals - Designing Your Inner Loop Process
- CX Fundamentals - Designing Your Outer Loop Process
- Reporting - Introducing Medallia Reporting Design
- Reporting - Performing Discovery for Medallia Reporting
- Reporting - Designing Your Medallia Reports
- Surveys - Survey Design Fundamentals
- Surveys - Applying Survey Design Best Practices
- Surveys - Survey Design Case Studies
- Thought Leadership - Realizing the CX Value Framework
- Thought Leadership - Establishing a Communications Plan
- Thought Leadership - Establishing a Training Plan



FEATURED VIDEOS

Wondering how to perform a specific task in Medallia Experience Cloud? Get quick answers with short, how-to videos and configuration steps.

ADMIN CONCEPTS - DIFFERENTIATING OSAT, LTR, AND NPS

(2 MINS)

Describes the fundamental differences between OSAT, LTR, and NPS while discussing how NPS is determined.

AD HOC SURVEYS - CONFIGURING AD HOC SURVEYS

(8 MINS)

This video will show you how to configure an Ad Hoc survey, from setting the design through to testing and deployment.

CALCULATING EMPLOYEE ENGAGEMENT USING ENGAGEMENT FAVORABILITY

(<5 MINS)

This video shows how to calculate employee engagement using the engagement favorability approach.

DXA - DEFINING MEDALLIA'S DIGITAL EXPERIENCE SCORE (DXS)

(2 MINS)

This video breaks down the concept of Units at Medallia to its most basic parts: the people, places, and things about which we collect feedback. This video shows how to calculate employee engagement using the engagement favorability approach.

EXPLORING THE CONNECTIONS BETWEEN CX AND EX

(7 MINS)

This video explores employee activation and the connection between EX and CX.

ORGANIZATION - UNDERSTANDING UNITS

(2 MINS)

This video breaks down the concept of Units at Medallia to its most basic parts: the people, places, and things about which we collect feedback.

SURVEYS - WHAT IS A SURVEY

(1 MIN)

Have you ever wondered what a Medallia survey is and why we use them? Explore this short video to learn about Medallia surveys.

TEXT ANALYTICS - GETTING TO KNOW TEXT ANALYTICS

(5 MINS)

Explore the basics of Medallia's Text Analytics (TA) and learn about the differences between Topics and Themes!

TEXT ANALYTICS - NAVIGATING TA REPORTING

(5 MINS)

Use Text Analytics (TA) Reporting to analyze and visualize what customers are saying at scale. TA reports and dashboards help you understand your unstructured data and take action.

TRANSLATIONS - ACCESSING AND EXPLORING TRANSLATIONS IN ADMIN SUITE

(3 MINS)

Learn how to access and explore translations in Admin Suite.



CATALOG

Interested in exploring all of the learning assets we have available? Log into Navigator today and search the Catalog, or use our topic-specific pages for a comprehensive look at training for a specific topic platform.

MEDALLIA BADGES

Type	Name
Practitioner	Closed-Loop Practitioner
	Journey of a Record Practitioner
	MXO Practitioner
	Reporting Design Practitioner
	Survey Design Practitioner
	Text Analytics Insights Practitioner
Specialist	Ad Hoc Survey Configuration Specialist
	Medallia Digital Configuration Specialist
	MXO Specialist
	Survey Configuration Specialist
	Translations Configuration Specialist
	Users and Rules Configuration Specialist
Developer	Medallia Query API for Developer

NAVIGATOR LIVE — ON DEMAND

Using Matrix, Ranking Order, and File Upload Question Types
Advanced Survey Build
Medallia API Capabilities
Alerts and Case Management
Calculations
Medallia Digital
Advanced Medallia Digital
Push Reports
Organizational Hierarchy

NAVIGATOR LIVE — ON DEMAND CONT.

Sensitive Data
Configuration Hygiene and Change Management
Handoffs and Data Dictionaries and Specs, oh my!
Pulling the Curtain Back: Text Analytics
Topic Building in Text Analytics
A Tour Through Medallia HealthWatch Reports
Pulling the Curtain Back: Digital Experience Analytics
Ask When? Ask Now
Employee Experience: Introduction to EX and Reporting
Employee Experience: Navigating EX Program Considerations
Pulling Back the Curtain: Medallia Experience Orchestration (MXO)
Digital Experience: Analyzing Page Experiences using Medallia DXA
TX Profiles: Connecting One's Past to Brighten Their Future
Medallia Mobile Apps Deep Dive
How to Quickly Gather Feedback with Ad Hoc Surveys
Organize and Track Initiatives Using Action Plans
Foundations of Medallia Agile Research
Reporting: Choosing the Right Dashboard Module for Your Data
Reporting: Advanced Dashboarding
Market Research at Medallia
Reporting: Advanced Dashboarding