Manage Your Programs with Speed and Control

Medallia

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This presentation may contain statements regarding our plans and expectations for the development of new or existing products, features, services, technologies and solutions. We have based these statements largely on our current expectations and assumptions and on information available as of the date of this presentation. However, these statements are subject to known and unknown risks, uncertainties and other factors that may cause the actual development of new or existing products, features, services, technologies and solutions to be materially different from the plans and expectations set forth in this presentation. In particular, the feature sets and delivery dates set forth in this presentation are based on various assumptions and estimates and subject to change.
Self-Service in Medallia
Accelerating the Agility of Our Customers

“I'm really enjoying the changes coming out in Admin Suite. I'm a heavy self-serve user and the tools have gotten much more intuitive and robust over time.”

“I really like the flexibility of using Admin Suite so I don't have to use managed service hours for those items.”

...but we still are hearing your comments on the overall set of self-service capabilities.
Medallia’s Self-Service Focus Areas

We’re Listening to What You Are Saying

- End-to-end program creation and maintenance
- Quick, easy automation of business and integration processes
- Flexible personalization for every Medallia user
Program Creation and Maintenance
The Two Flavors of Medallia Programs

**Ad Hoc Programs**

Rapid implementation to easily solicit point-in-time feedback:

- Fully guided user experience
- Single survey and invitation
- Out-of-the-box dashboard, pivot table, stats, exports
- Easily share reports with colleagues

**Enterprise Programs**

Collect feedback on key touchpoints, driving insights and action across your organization:

- Complex multi-channel, multi-brand feedback capture
- Insights at scale, leveraging role-based reports and org hierarchy
- Automate action within Medallia and across platforms
MEDALLIA ADMIN SUITE: AD HOC PROGRAMS

Implement New Programs at the Speed of Your Business

• **Intuitive navigation** assists users through every step of creating a feedback program.

• **Improved survey builder** makes setup and revisions simple for most common question types.

• **Automatic report creation** for summary of results & detailed responses.

• **Easily share and export** feedback data.
Demo Time!
Implement Your Ad Hoc Programs for Different Local Audiences

- Easily assign and manage languages for each ad hoc program.
- Access at-a-glance statistics for translation completeness and errors.
- Identify new translations gaps when changes are made to surveys and emails.
- Craft surveys and emails in any base language.

Availability starting Fall 2020
MEDALLIA ADMIN SUITE: ENTERPRISE PROGRAMS WIZARD

Manage Enterprise Feedback Programs with Confidence

- Bring together the full power of Medallia in one place.
- Measure CX at scale, delivering insights and driving action across your organization.
- Understand the impact of every change so that you can iterate quickly and safely.
- Manage all the key facets of your enterprise feedback programs, including data imports and mapping, and closed-loop feedback workflows.

Early Availability Fall 2020
Demo Time!
Enterprise Programs

Fall ‘20: Early Adopter Program
- Enterprise Program Wizard
  - Summary
  - Surveys
  - Reports
  - Workflows
  - Fields

Winter ‘20 General Availability
- Enterprise Program Wizard
  - Data Import: Automation
  - Data Import: Transformation
  - Data Exports
Business Process Automation
MEDALLIA ADMIN SUITE: WORKFLOW AUTOMATION

Streamline Business Processes and Integrations

- Prompt users to take action on feedback, intelligently routing notifications & cases.
- Create automated triggers based on event, employee, survey, and text analytics data.
- Construct flows that mirror the complexity of your business.
- Synchronize feedback data with external systems as it’s received.

Availability starting Fall 2020
Demo Time!
Workflows

Fall '20: Early Adopter Program
- Email Notification
- Web Callout

Winter '20 General Availability
- Self service for Alerts
Personalization for Medallia Users
User Personalization in Medallia

Drive user engagement and action through personalization

- Personal Notifications
- Notification Feed & Preferences
- Social Features
- User Customizable Dashboards
PERSONAL USER NOTIFICATIONS

Track Metrics and Surveys that Matter to You

- Get notified when a score or metric is outside a configured threshold.
- Monitor responses based on your own personal rules and criteria.
- Support for universal notification feed, email, and mobile app push notifications.

Availability starting Summer 2020
FEED, PREFERENCES, & SOCIAL FEATURES

Receive and Share the Data That Matters

- Access notifications across Medallia web and mobile reporting applications.
- Like and comment on records, as well as mention others in comments to send a notification.
- Set your notification preferences for timing and delivery channel (feed, Medallia Mobile, email)

Availability starting Fall 2020
Allow Each User to Focus on What Matters Most to Them

- Choose the criteria of data you are interested in to create custom scorecards for your instance of the Medallia Mobile app.
- Toggle between the main (admin-configured) dashboards and personalized scorecards at any time.
Medallia’s Self-Service Focus Areas

We’re Listening to What You Are Saying

End-to-end program creation and maintenance

Quick, easy automation of business and integration processes

Flexible personalization for every Medallia user
Learn More

Request a Follow-Up

To request a conversation with your account team, type “call me” in the Q&A box.

Watch Other Sessions

Here are some additional topics you may be interested in:

- LivingLens
- Digital
- Integrations