10 Ways to Supercharge your Salesforce® Data with Medallia

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It's imperative to include the voice of your customer in everything you do

Your CRM system holds a vast array of essential customer information based on your relationship with them. But what about the customer's perspective?

This is where we come in. Together with your Salesforce® sales and relationship data, Medallia's customer experience management platform collects voice-of-customer feedback, analyzing the results and bringing insights to your employees for seamless customer-centric action. The seamless integration between these two powerful platforms allows your teams to take action in the moment, driving positive business outcomes such as increasing cross-sell opportunities and reducing churn.

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01 Personalize and contextualize every service interaction

Agents have access to cross-organizational feedback about customers while they're working in Salesforce® Service Console and can tailor each customer's experience to proactively meet their needs.

For example, a customer gave feedback about being transferred too many times on a previous call and having to re-explain his issue to each new rep; so instead the agent makes sure to stay on the line with him if she needs to transfer him to another agent so that she can explain what is going on.

02 Include the "why" with the "what."

Case closure in Service Console triggers instantaneous feedback via the customer's preferred interaction medium to facilitate frictionless feedback capture.

Trigger feedback immediately upon case closure when the experience is still fresh in the customer's mind, driving better quality feedback and higher response rates.

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03 Turn your call center into a retention and growth center

Sentiment-, AI-, and text-based alerts in Medallia open cases in Service Console to enable immediate follow-up with customers.

04 Drive a customer-centric culture

Maximize your investment in the Salesforce® platform by integrating essential customer-facing workflows.

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05 Generate leads and opportunities

Identify and act upon upsell and cross-sell opportunities directly from the voice of the customer.

06 Personalize and contextualize every sales interaction

View cross-organizational feedback of the most relevant moments across an organization from individual contacts and across an account in Sales Cloud®.

07 Identify at-risk accounts

Flag potentially at-risk revenue to the right people with Salesforce® Cases generated from a combination of Medallia Scores, Segments, AI, and TA.

08 Drive adoption of Salesforce

Maximize your investment in the Salesforce® platform by breaking down technology silos and integrating essential workflows to respond faster to customer needs.

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09 Nurture happy customers and accounts

Promoters are less price-sensitive, tend to buy more, and generate positive word of mouth. Know who these people and accounts are to build champions within an organization and deliver more value to your customers.

10 Create efficiency in your organization

Promote a more productive workforce by breaking down data silos, enabling your people to access core workflows seamlessly without having to jump back and forth between systems.

→ **Find out more about how Medallia can supercharge your CRM from our on-demand** webinar, **10 Best Practices to Transform the Customer Experience with Salesforce® and Medallia.**

About Medallia

Medallia is the pioneer and market leader in Experience Management. Medallia's award-winning SaaS platform, the Medallia Experience Cloud, leads the market in the understanding and management of experience for customers, employees and citizens. Medallia captures experience signals created on daily journeys in person, digital and IoT interactions and applies proprietary AI technology to reveal personalized and predictive insights that can drive action with tremendous business results. Using Medallia Experience Cloud, customers can reduce churn, turn detractors into promoters and buyers and create in-the-moment cross-sell and up-sell opportunities, providing clear and potent returns on investment. www.medallia.com

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