# Arm Sales and Support with the Voice of the Customer

Medallia CRM Integration.

Customers provide feedback everywhere, from emails and surveys to smartphone apps and social media. Great companies know that to create experiences customers love, they must listen, learn, and drive improvements based on that feedback.

Medallia's integration with CRM systems makes it easy for account managers and contact center agents to view and take action on customer feedback data natively within your CRM. Without having to use a separate login, employees can close support tickets, view contact and operational data, review feedback, and close the loop with unhappy customers.

Medallia

Key Benefits for Account Managers

Take action on Medallia survey feedback within CRM mobile apps.
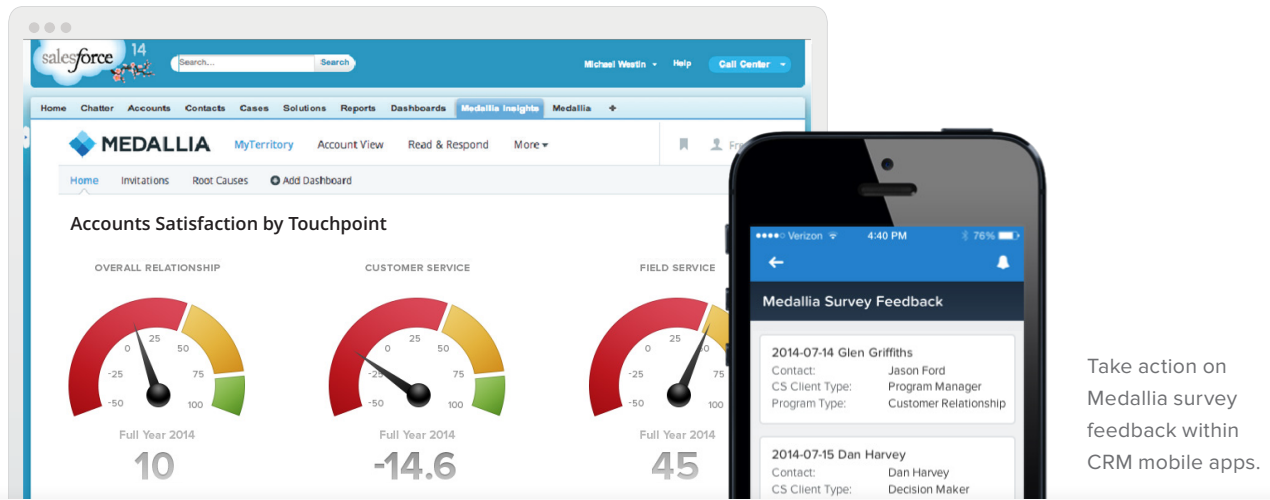
Broaden adoption of your customers' feedback
Account managers live and breathe in CRM. Instead of introducing a new system, Medallia seamlessly brings customer feedback into your existing solution. Account managers can see rankings of clients from happiest to unhappiest, and the revenue at risk they represent more quickly. They can also view historical feedback in the context of business activities, and see a unified view of all stakeholders within each account across their customer base.

Link satisfaction and revenue data, showing the impact of customer experience
Once customer feedback is in your CRM, you can report on it in tandem with all of your revenue and marketing data. This enables account managers to easily understand the impact that satisfied customers have on business. It also allows marketers to be more targeted and define specific campaigns to recover detractors or upsell promoters.

Streamline relationship surveys and remove process headaches
Getting a list of who to survey and when can be cumbersome, but Medallia's integration makes it simple. In Salesforce, for example, account managers can just click the check box next to a contact to include them in the next survey wave. By making it easy for account managers to include customers in survey waves, they can go broader in their accounts, keep company contacts up to date, and know which customers are at risk and who is primed for an upsell.

One login for your CRM and your customer experience feedback
With real-time integration and single sign-on support, you can bring all of Medallia into your CRM. Users don't need to deal with additional login credentials and are only a click away from the trending and analysis tools that aren't available natively within your CRM.

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Key Benefits for Support Agents

Survey customers immediately after the transaction

Through integration, Medallia can send a survey immediately after a CRM ticket is closed—not 24 hours later. Immediate surveys improve response rates, and because episodic memory rapidly decays, customers can provide more accurate insights while the experience is fresh in their minds. Plus, traditional Medallia sampling and quarantine rules still apply, so you'll never over-survey your customers.

Agent Closes Case → **Triggers Survey** → **Customer Responds** → **Triggers Alert**

Sync CRM case management tickets with Medallia feedback triggers

For customers who prefer to manage their cases outside Medallia's platform but still want notifications when surveys trigger an alert, Medallia can sync ticketing systems in real time. For example, the solution automatically creates new tickets in the Salesforce.com Service Console when a customer provides feedback that warrants further action.

**Workforce Optimization: Grant agents full access to their Medallia feedback within your CRM**

Contact center time is valuable. Medallia can integrate directly into your CRM and ticketing systems so that users don't have to juggle separate logins to review their Medallia scorecards and performance feedback. With survey responses coming in real time, agents can quickly learn directly from the customer, and team leads have the opportunity to coach an agent right after a call ends.

Know the full picture with complete caller history

Relying only on agent notes won't give you the full picture of a customer's experience. Medallia's cohort tracking shows previous cases to agents and the relevant feedback, creating a full historical reference.

Use Salesforce.com? Medallia is on the Salesforce App Exchange for Service Cloud customers. The Medallia app provides powerful integration with the Salesforce.com service console. For more information, go to: **appexchange.salesforce.com.**
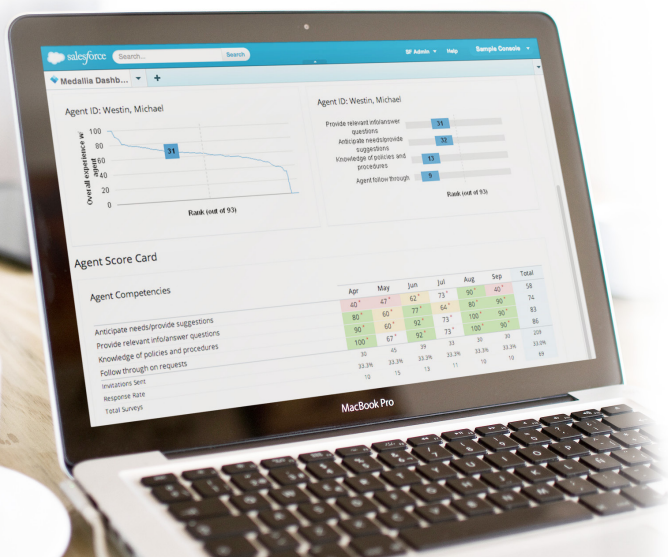
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About Medallia

Medallia® is the Customer Experience Management (CEM) company that is trusted by hundreds of the world's leading brands, including Four Seasons, GE, Gold's Gym, Sephora, Verizon, and Zurich Insurance. We enable companies to survey and capture customer feedback across Web, social, mobile, and contact center channels, understand it in real-time, and take action to improve the customer experience (CX). We offer world-class engineering, technology innovation, a customer-centric services organization, and a Software-as-a-Service (SaaS) application that is accessed by all your employees, from the C-suite through to the frontline. Medallia helps companies create customers who love your business. Founded in 2001, Medallia has regional headquarters in Silicon Valley, London, and Buenos Aires. Learn more at www.Medallia.com.

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