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Close the Loop with your customer with Medallia and Salesforce®

Medallia's Closed Loop Service Experience for Salesforce®

Frontline workers are often the only human interaction a company has with their customers, which makes them a secret weapon when it comes to delivering on brand experience, identifying trending issues, recovering customers, and even driving new business. However, to make your service centers truly effective, you need to do two things:

- Automatically solicit feedback after every interaction and "close the loop" with your customers.

- Build high quality feedback into each customer record to enhance the 360 degree view you have in Salesforce Service Cloud.

The Medallia + Salesforce Difference

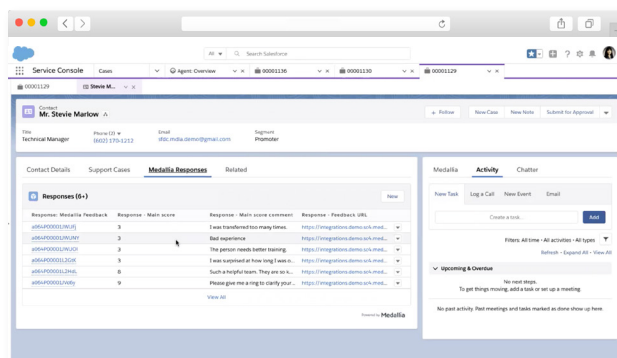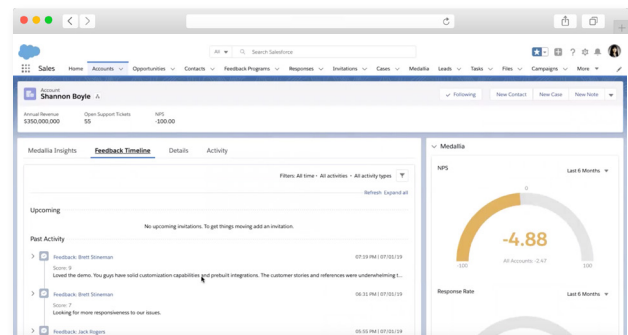The Medallia Experience Cloud is a customer experience (CX) management platform, which:

- Combines the most comprehensive set of capabilities for collecting voice-of-customer feedback

- Analyzes the results through Medallia's AI

- Delivers insights to employees for customer-centric action at enterprise scale

With the Medallia Closed Loop Service Experience for Salesforce, this outside-in view of the customer can be unified with Salesforce data to ensure that service center representatives understand each customer, drive higher customer loyalty, and improve business outcomes.

Medallia's Closed Loop Service Experience for Salesforce®

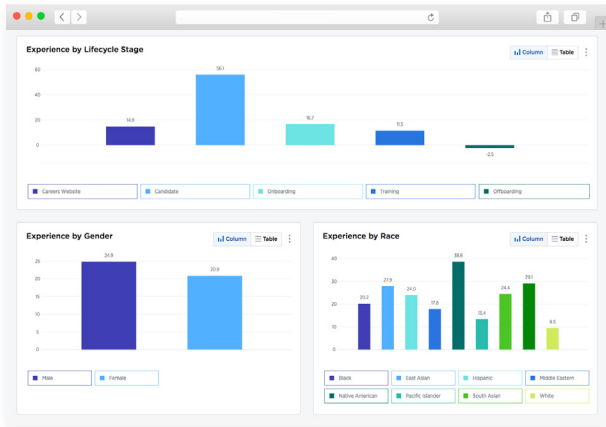## 1:1 Follow-up Actions: Operationalizing the Voice of the Customer

Improve every customer experience and reduce churn by learning from each customer interaction in the contact center. Automatically solicit feedback and leverage Medallia's AI to identify which individual customers require follow-up and engage 1:1

Drive Operational Efficiencies & Innovation

Reduce cost to service your customers by analyzing your aggregated feedback and learnings at scale to detect patterns and opportunities to build more knowledgeable teams and inform structural shifts in your business. Drive targeted actions informed by data and infused by the voice of the customer to make changes that matter to improve experiences before, during, and after they occur.

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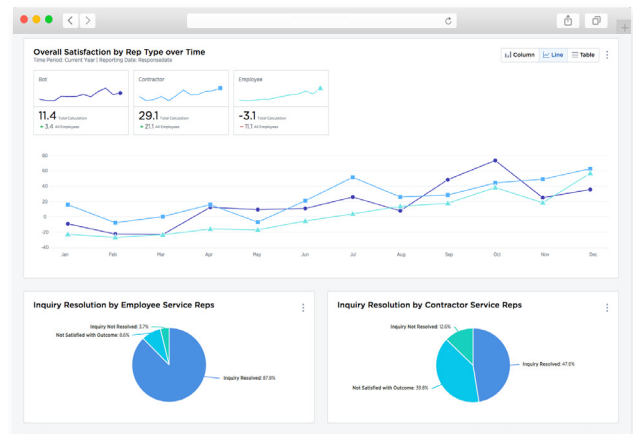# Medallia's Closed Loop Service Experience for Salesforce®

Drive a Customer Centric Culture in Your Contact Center

Your agents are your organization's lever to course correct on previous interactions with a customer, pinpoint unmet needs to reduce calls backs, and identify new opportunities for revenue growth. Maximize your investment in the Salesforce platform by improving training, coaching and agent performance. Quickly identify and understand knowledge and quality gaps.

Personalize and Contextualize Every Service Interaction

Improve your agents' 360 degree view of the customer with the customer's voice at their fingertips to make sure the customer's perspective is at the center of every interaction. Agents have access to all feedback from that customer while working every case in Service Cloud, enabling them to tailor each experience and proactively meet the customer's needs.

Medallia + Salesforce Turns Your Contact Center into a Growth and Retention Center

✔ Grow revenue from new leads generated through direct, unstructured feedback and AI

✔ Save customers who are at risk of churning

✔ Reduce cost to serve by identifying and correcting systemic issues

✔ Improve training, coaching and agent performance by understanding gaps in service

✔ Identify emerging customer preferences

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What's included in Medallia's Closed Loop Service Experience for Salesforce®

- **Event-driven feedback management:** Use pre-built automation rules that automatically trigger experience feedback invitations to be sent from Medallia based on key events in Salesforce, such as case closure.

- **Embedded Voice of the Customer in the 360° view of the contact and account:** Give agents access to all feedback from that customer while working cases in Service Cloud to tailor the customer experience and proactively meet their needs

- **Automated inner closed loop feedback actions:** Use pre-built workflows that automatically create follow-up cases in Salesforce based on feedback response rules, including cases triggered from sentiment, segmentation, and topics discussed in the feedback.

- **Embedded Experience Insights:** provide service users with visualizations of aggregated results and individual feedback details accessible on the Account record, as well as through customer reports and dashboards.

- **Bi-directional integration for outer closed loop feedback actions:** Document root cause, actions taken, and other learnings in Salesforce in order to codify those learnings to create and test improvement initiatives. Bi-directional integration between the two platforms ensures that Medallia and Salesforce stay in sync.

- **Text Analytics for actionable insights into what customers are talking about:** Use Medallia's best-in-class Natural Language Process and Machine Learning technology to understand frequency, impact, and sentiment at scale with respect to important topics being discussed by your customers and emerging themes that are arising so that you can make informed and targeted decisions about evolving your business.

Get started with Medallia

If you are interested in learning more about how Medallia can bring voice of the customer insights and actions into your Salesforce CRM, please visit the application listing on the AppExchange.

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. Medallia has offices worldwide, including Silicon Valley, Buenos Aires, London, New York, Tel Aviv and McLean, Virginia. Learn more at www.medallia.com.

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