Medallia

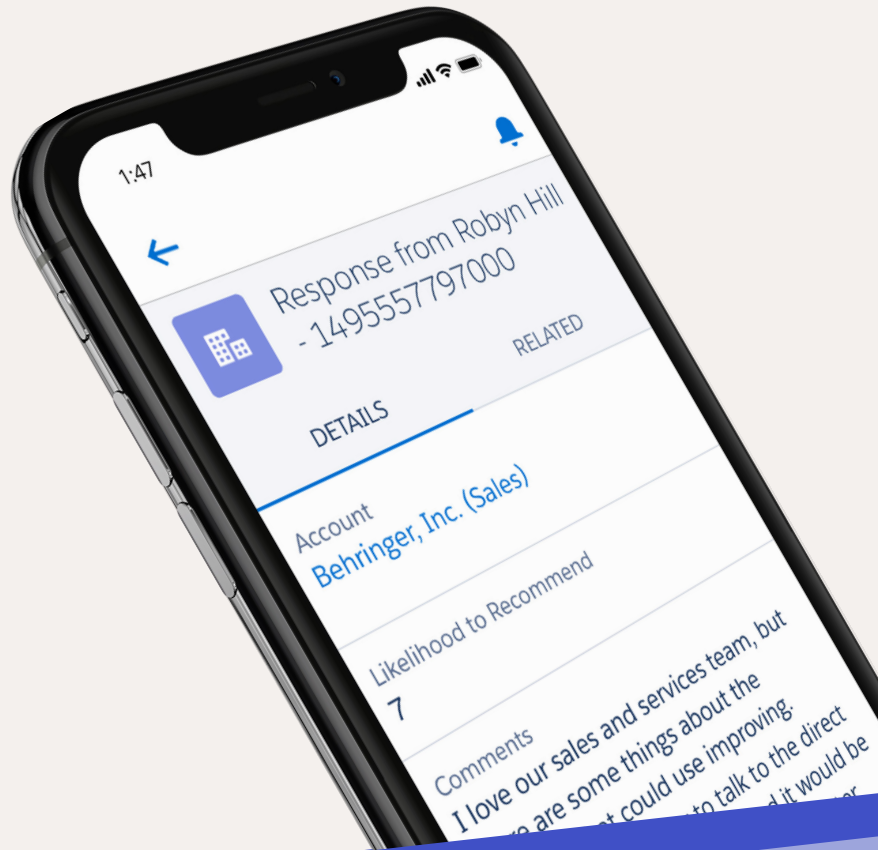## Embed the voice of the customer in your CRM

Medallia Sales & Service Experience
for Salesforce®

Customer Relationship Management (CRM) solutions are essential systems of engagement for agencies to serve their customers and improve government/citizen relations. But while they contain important customer information, it is primarily based on what the agency knows about the relationship — what is missing is the customer's perspective.

The Medallia Experience Cloud is a customer experience management platform, which brings together the most comprehensive set of capabilities for collecting voice-of-customer feedback, analyzing the results and bringing insights to employees for customer-centric action.

With the Medallia Sales & Service Experience integration application, this outside-in view of the customer can be unified with Salesforce data to ensure that employees are aligned with customers, drive higher customer loyalty, and improve outcomes.

Solutions for Sales and Support

Medallia integration for sales users

Salesforce is instrumental to customer facing roles in the government. Medallia brings customer feedback directly into Salesforce, so your customer-facing teams get a comprehensive view of account health — embedding the customer's perspective into dashboards and reports accelerates their ability to close the loop with contacts where needed, as well as to identify where changes are needed to improve the relationship. Customer facing personnel have access to account health by department, segment, or region, so they can better identify risks and opportunities to maximizing effectiveness. And by linking customer feedback with revenue data in Salesforce, customer-facing teams can easily understand the financial impact of customer satisfaction.

Medallia integration for service users

Your customer service team's time is valuable. The Medallia integration application brings individual and aggregated customer feedback to agents, so that they have fast and easy access to critical information about their service interactions. With the integration to Medallia Experience Cloud, service centers can automatically invite customers for feedback after support interactions, learn from customer feedback insights, and close the loop with unhappy people, all in one place. Team managers can easily view Medallia's feedback insights to coach their team and know where to focus attention, and executives gain a comprehensive understanding of the customer experience directly within Salesforce.
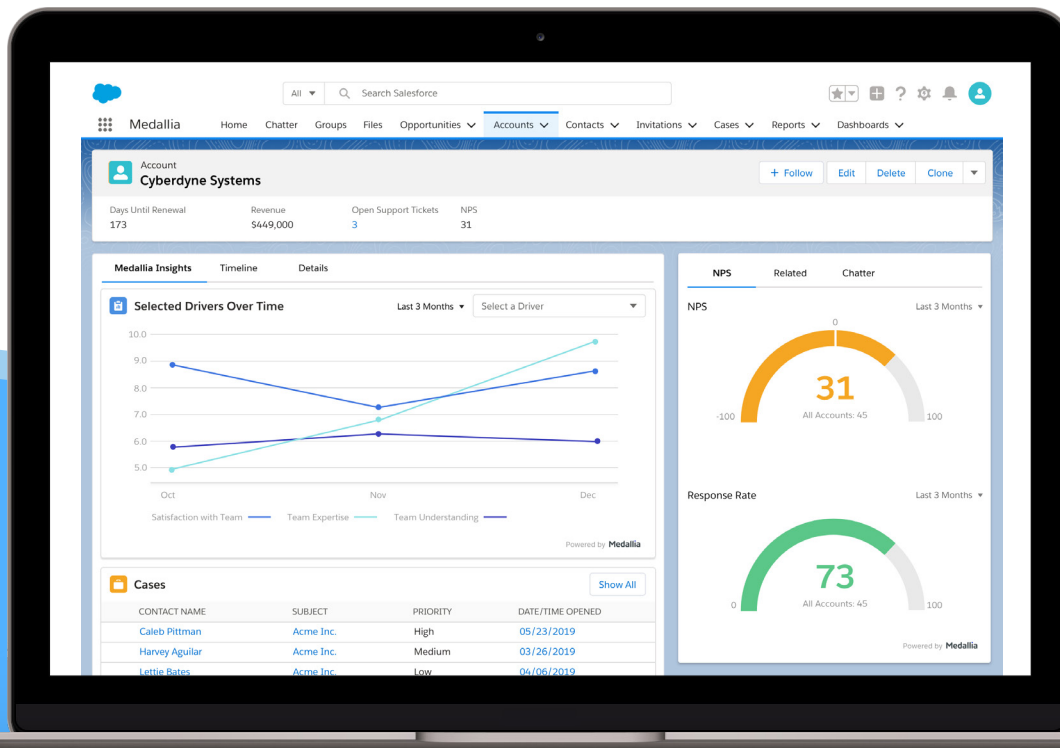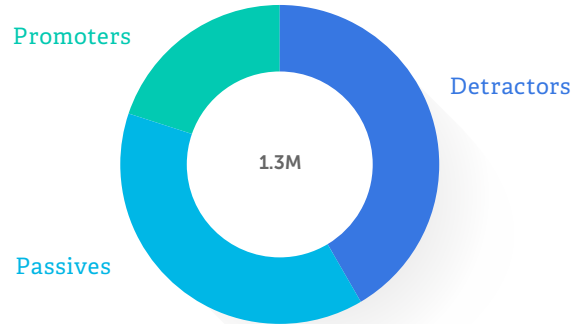

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Benefits of the Medallia Integration Application

Gain a complete view of customers

Feedback data and analytics from Medallia use Lightning components to integrate with Salesforce data, creating contextual access to experience insights so your customer-facing teams have a more accurate understanding of their customer relationships. And with Medallia's single sign-on support, authorized users are one click away from deeper analytics available in Medallia Experience Cloud.

Sales Manager Open Pipeline
Sum of Amount

Promoters

Detractors

1.3M

Passives

Account Program Contacts

Action	Name	Email	Relationship Survey
Edit	Sharon Norman	SNorman@orion.com	☑
Edit	Debbie Smith	DSmith@orion.com	☐
Edit	Michael Lee	MLee@orion.com	☑

Trigger feedback surveys with ease

The Medallia integration application allows feedback requests to be initiated across the customer journey — from important moments in a service cycle (e.g., first contact, resolution) to relationship activities and touchpoints (e.g., initial service, servicing, closed loop follow up calls). Use our pre-configured trigger processes or create your own in Salesforce Process Builder.

The application also puts control in your Salesforce users hands. Sales and relationship managers can add Salesforce contacts to a Medallia feedback program without ever leaving Salesforce.

Streamline workflows to close the loop

Feedback results can be used to create email and Chatter alerts, and to initiate workflows in Salesforce, using rules defined with the Medallia integration application.

This allows end-to-end feedback response and remediation processes to be handled in the platform your employees work in every day — accelerate follow up with detractors to show them you value their input, and use customer feedback for collaboration to continually improve relationships.

Search Sales

Service   Home   Leads

Task
Alert–Low NPS

Name   Related
Scott Smith   0000
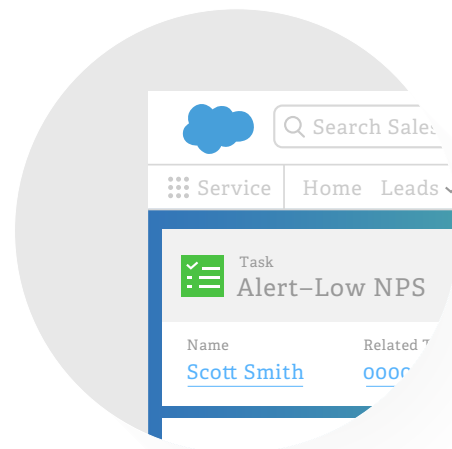
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What's Included in Medallia Sales & Service Experience for Salesforce

- **Targeted invitation management:** manage contacts associated to a Medallia feedback program invitation list directly within the Salesforce Account record.

- **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. (e.g., case closed, problem resolution, onboarding completed)

- **Push notifications:** alert account team members or executives through direct notifications in Salesforce, or through email when key stakeholders provide feedback.

- **Embedded experience insights:** provide Salesforce users with visualizations of aggregated results and individual feedback details accessible on the Account record, as well as through custom reports & dashboards.

- **Automated closed-loop feedback actions:** assign follow-up cases in Salesforce based on feedback response rules configured using the application.

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.

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