

CUSTOMER SPOTLIGHT

Anaplan

Using the customer voice to drive best-in-class experiences



Results

77 point

Customer Care
Net Promoter Score

80%

of Anaplan Customer Care employees
log in to the Medallia platform to view
and act on customer data

ANAPLAN
Industry: High Tech

Medallia

SUMMARY

- Anaplan is a cloud-native enterprise SaaS company who was recently named a leader in Gartner's Magic Quadrant for Cloud Financial Planning & Analysis Solutions.
- Anaplan deployed Medallia Experience Cloud to enable the entire organization to get real-time feedback and understand what customers are saying at an account level to drive maximum customer impact.
- Anaplan provides necessary employees in the company access to actionable customer feedback, which contributes to Anaplan's Customer First (C1) culture, from product managers and account executives to product support analysts.
- Anaplan's Customer Care Net Promoter Score (NPS) at the end of their fiscal year increased to 77, confirming their customer centricity leadership in the SaaS industry.

Putting the customer first

Anaplan provides a platform for business-run modeling and continuous planning under varying business conditions. Recently named a Leader in Gartner's Magic Quadrant for Cloud Financial Planning & Analysis Solutions for the fourth consecutive year, the company's mission is to change the way the world's most respected companies make decisions.

Moving at the speed of technology, Anaplan is eager to ensure that its customers gain the benefits of connected planning as quickly and easily as possible. Company leadership challenged the organization to find new ways to put the customer first, encouraging all Anaplan employees to work together to help customers succeed.

The company leaned into their C1 strategy by reconsidering how they were managing customer feedback. Prior to Medallia, the team gathered feedback after service interactions; however, the company used a variety of tools that were not easily accessible to everyone within the organization. In addition, account teams and company leadership had no easy way to see feedback from customers that might be impacting overall relationship health.

To ensure Anaplan's employees are acting on direct customer feedback, the company worked on finding the right platform to help the company focus on customers first.

A comprehensive view of the customer journey

Anaplan replaced a collection of feedback mechanisms with Medallia Experience Cloud to capture and analyze feedback about service interactions, supporting English, Japanese, French and German. Medallia's feedback design allows product support analysts to follow up with customers who need additional assistance. Support Managers also see the results for each analyst so they can deliver personalized training and coaching, allowing them to deliver a world-class customer experience.

The company took the proactive step of ensuring that necessary employees in the company had access to customer feedback, with role-specific views and data access. Leaderboards help drive engagement for key positions, including VPs, directors, account executives, business partners, and others, so that front-line employees understand the status of each customer relationship.

By adding multiple feedback touch points across the customer journey, account teams now have a comprehensive view of account health, accelerating their ability to close the loop with at-risk accounts. Leadership and account teams leverage the Anaplan platform, combined with data from Medallia and Salesforce, to see a 360-degree view of customer health by account, segment, region, and other attributes.

Using Medallia in collaboration with Anaplan, we can now see real-time customer feedback alongside other account metrics to monitor customer health.

Erin Siemens,
Chief Customer Officer, Anaplan

Pervasive feedback leads to higher NPS

Within the first year of using Medallia, Anaplan's Customer Care NPS increased to 77, which is recognized as best in class. The adoption of Medallia was instrumental, with 80% of Customer Care employees logging into the Medallia platform to view and act on customer data during the first year, making it easier for the team to share customer feedback with product managers and engineers. This helps influence priorities for product features, updates, and support options.

Employees and leadership alike are enthusiastic about using Medallia to ensure customer success. Leaders use personal dashboards, customized to monitor response rates and customer satisfaction scores, and account owners use each customer's feedback to build a shared vision of future success. Medallia helps Anaplan deliver on these promises by providing actionable insights that engage its entire workforce.

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Having access to real time feedback allows us to make faster, more intelligent decisions across Anaplan. These decisions can include everything from how we design our platform to how we deliver everyday support.

Anne Cooper
Vice President, Customer Care, Anaplan

Learn more at medallia.com

About Us

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. Using Medallia customers can reduce churn, turn detractors into promoters and buyers and create in-the-moment cross-sell and up-sell opportunities, enabling clear returns on investment. [Medallia.com](https://medallia.com).

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