Medallia for Salesforce

10 Best Practices to Transform the Customer Experience with Salesforce and Medallia

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Safe Harbor

This presentation may contain statements regarding our plans and expectations for the development of new or existing products, features, services, technologies and solutions. We have based these statements largely on our current expectations and assumptions and on information available as of the date of this presentation. However, these statements are subject to known and unknown risks, uncertainties and other factors that may cause the actual development of new or existing products, features, services, technologies and solutions to be materially different from the plans and expectations set forth in this presentation. In particular, the feature sets and delivery dates set forth in this presentation are based on various assumptions and estimates and subject to change.
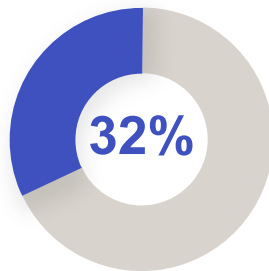
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Great Experiences Lead to Great Results

16%

Customers will **pay up to 16% more** for a great experience

32%

32% of customers will walk away from a brand they love after just one bad experience

5x

CX Laggards

CX Leaders

CX Leaders have greater revenue growth over CX Laggards

In fact, they see it as a differentiator

89% of companies compete primarily on the basis of customer experience

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Companies think they are addressing this

80%

of companies believe they
deliver "super experiences"

But customers do not agree

Only

8%

of customers believe that brands deliver superior experiences

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Medallia Enables Organizations to Deliver Extraordinary Experiences in Live Time

Understand Every Journey

Capture signals from experience and operational data to understand *every* experience along *every* customer/ employee journey

Anticipate Needs, Predict Behavior

Leverage AI and machine learning to **detect patterns** and **predict behavior** and identify risks and opportunities to optimize experiences

Transform Experiences

Expectations

Experience GAP

Experience Delivered

Make changes **that matter** by driving targeted, meaningful actions **before, during, or after** experiences occur

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Challenges for Effectively Serving Customers

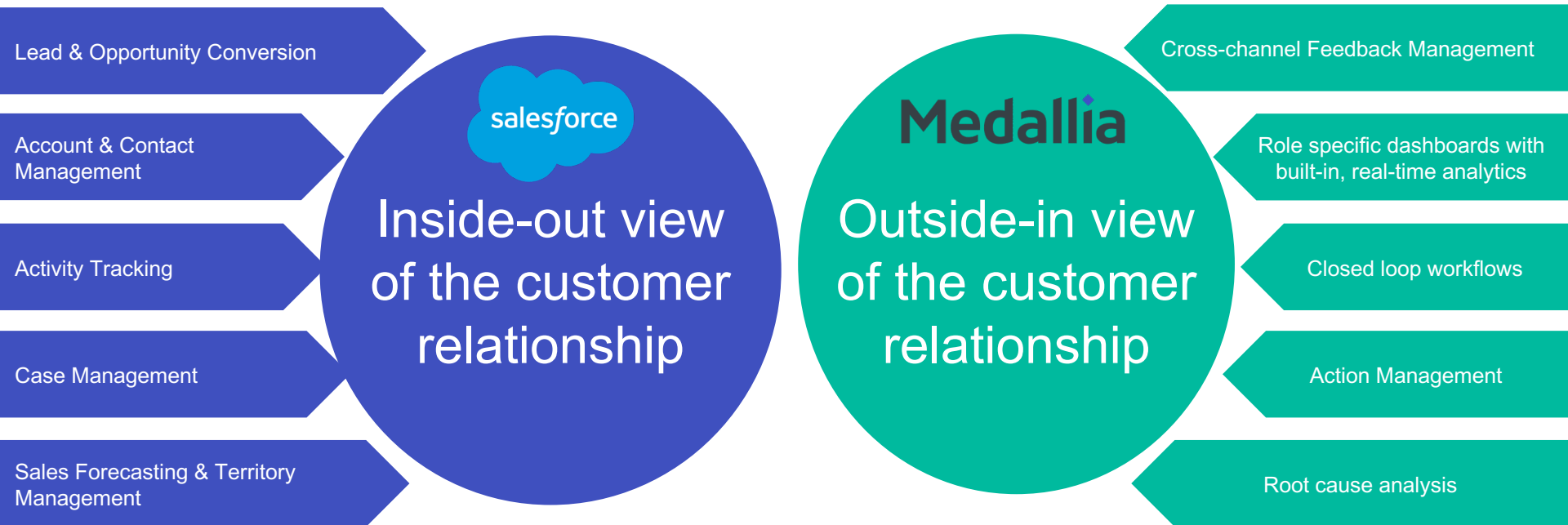Information silos across customer data systems
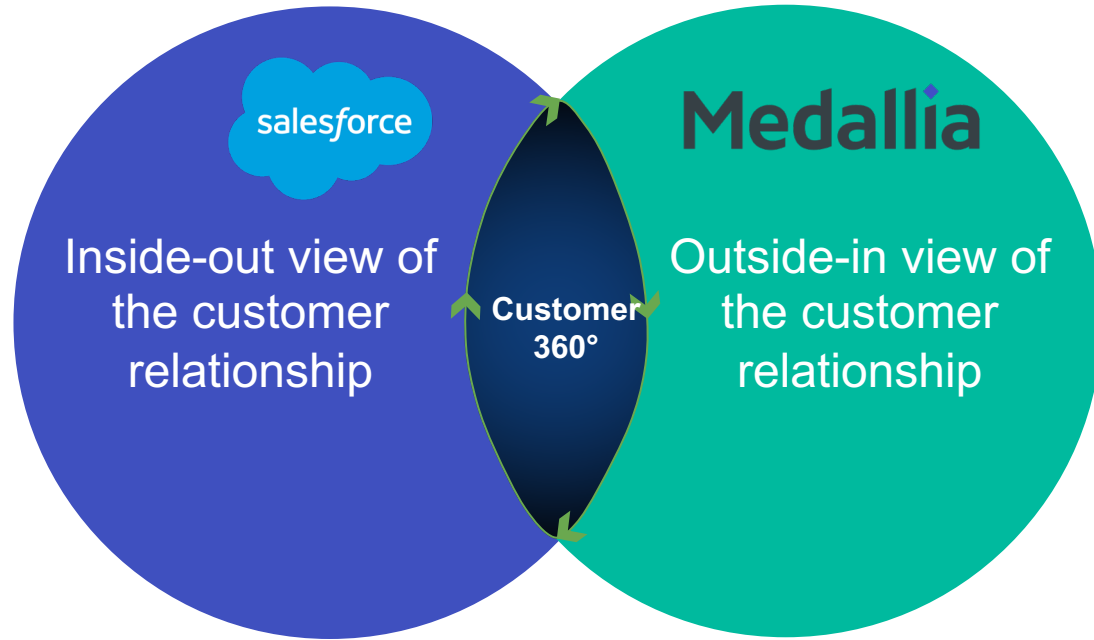

Employees missing the customer perspective

Lack of collaboration to resolve systemic issues

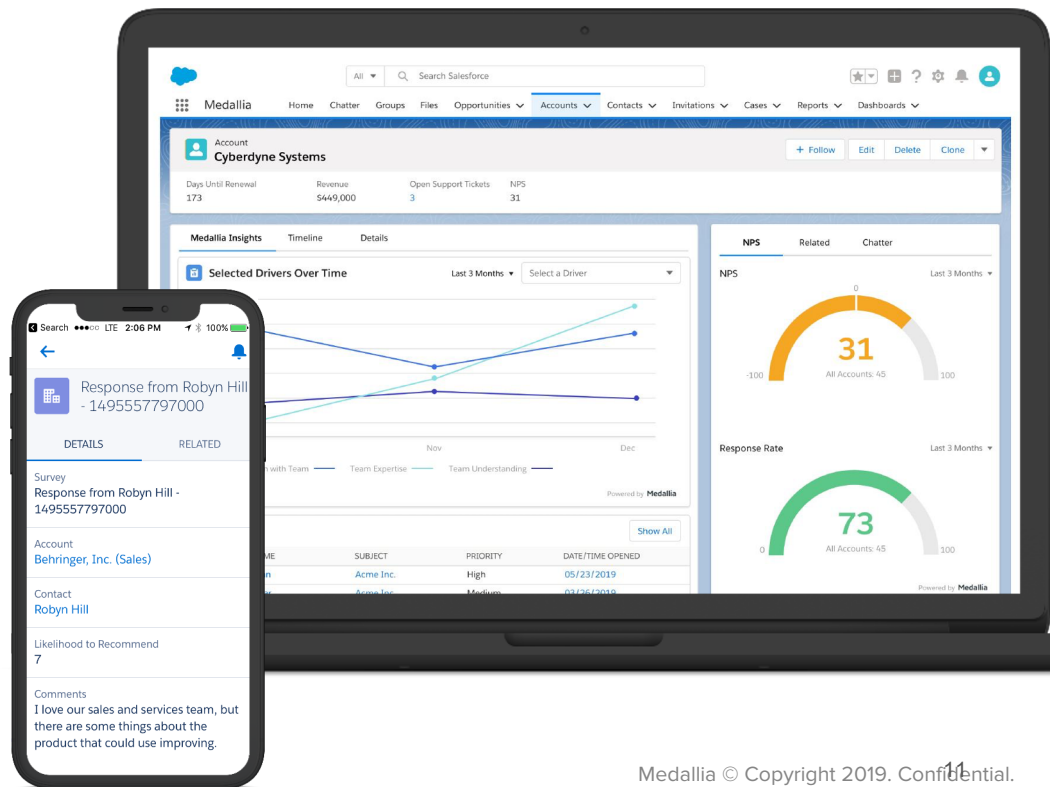**Medallia**

Salesforce and Medallia Have Different Strengths...

Lead & Opportunity Conversion

Account & Contact Management

Activity Tracking

Case Management

Sales Forecasting & Territory Management

salesforce
Inside-out view of the customer relationship

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Outside-in view of the customer relationship

Cross-channel Feedback Management

Role specific dashboards with built-in, real-time analytics

Closed loop workflows

Action Management

Root cause analysis

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...That Are Two Sides to the Experience Ecosystem

salesforce

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Inside-out view of the customer relationship

Customer 360°

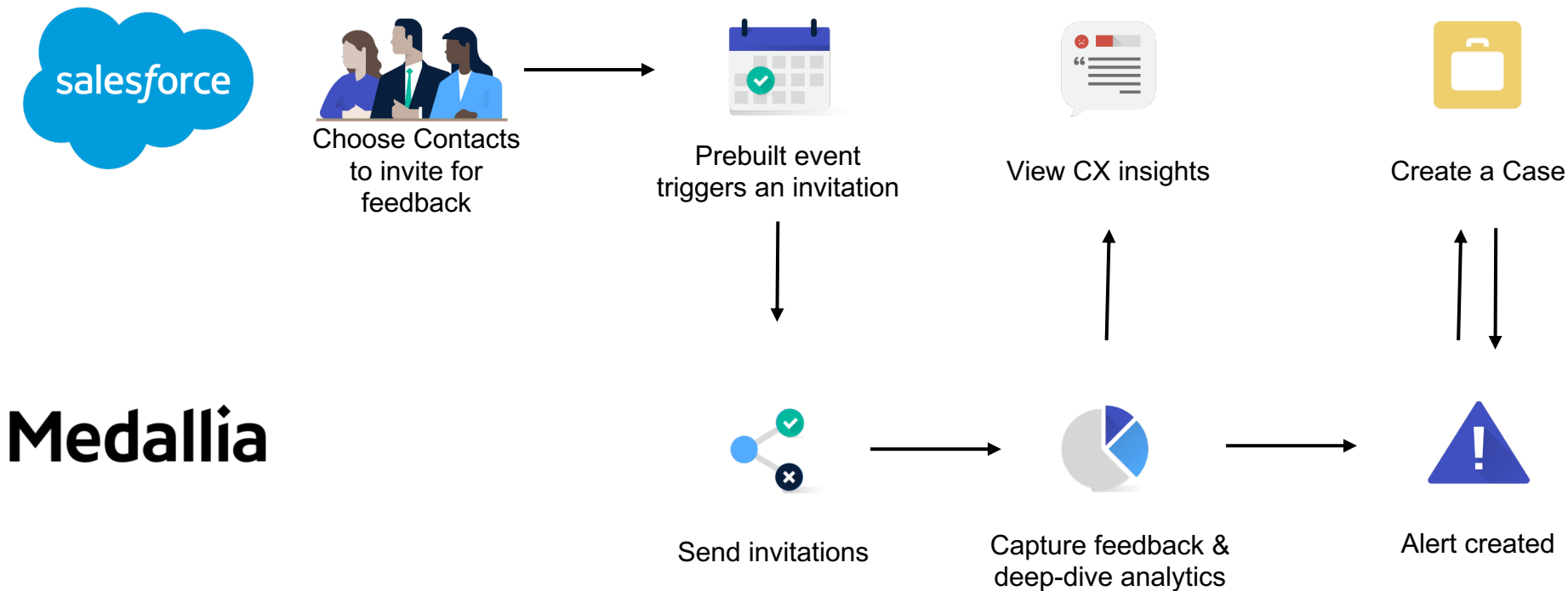Outside-in view of the customer relationship

Introducing Medallia Sales & Service Experience for Salesforce

- Bring voice of the customer into CRM

- Automate feedback invitations for key events in Salesforce

- Drive customer-centric actions and collaboration across teams

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Bi-directional Integration Powers CRM Workflows

salesforce

Choose Contacts to invite for feedback → Prebuilt event triggers an invitation

View CX insights

Create a Case

Medallia

Send invitations → Capture feedback & deep-dive analytics → Alert created

Invitation Management

salesforce

Choose Contacts to invite for feedback

Prebuilt event triggers an invitation

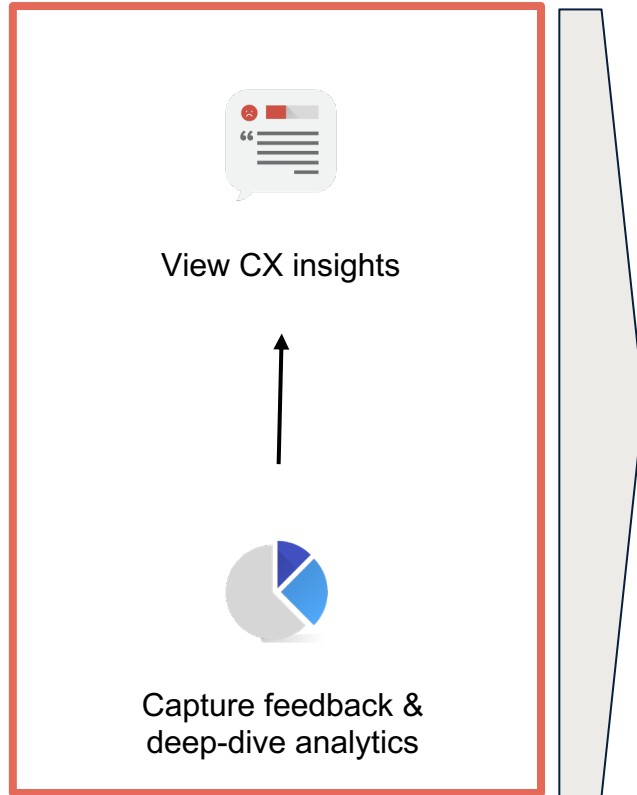Send invitations

Include the "Why" with the "What"

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Insights Management

salesforce

Medallia

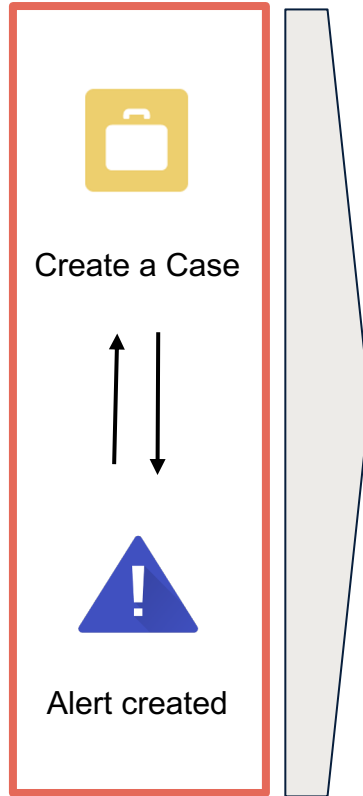View CX insights

↑

Capture feedback &
deep-dive analytics

- **Personalize Every Experience**

- **Contextualize Every Experience**

- **Nurture Happy Customers and Accounts**

- **Generate Leads & Opportunities**

Closed Loop Management

Create a Case

Alert created

- **Turn Your Contact Center into a Retention & Growth Center**

- **Identify At-Risk Accounts**

Bi-Directional Integration Powers Success

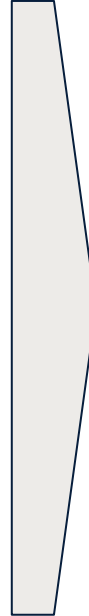**INVITATION MANAGEMENT**

INSIGHTS MANAGEMENT

CLOSED LOOP MANAGEMENT

- **Create Efficiency in Your Organization**

- **Drive Adoption of Salesforce**

- **Instill a Customer Centric Culture**

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Demo

Invitation Management

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Choose Contacts to invite for feedback

Prebuilt event triggers an invitation

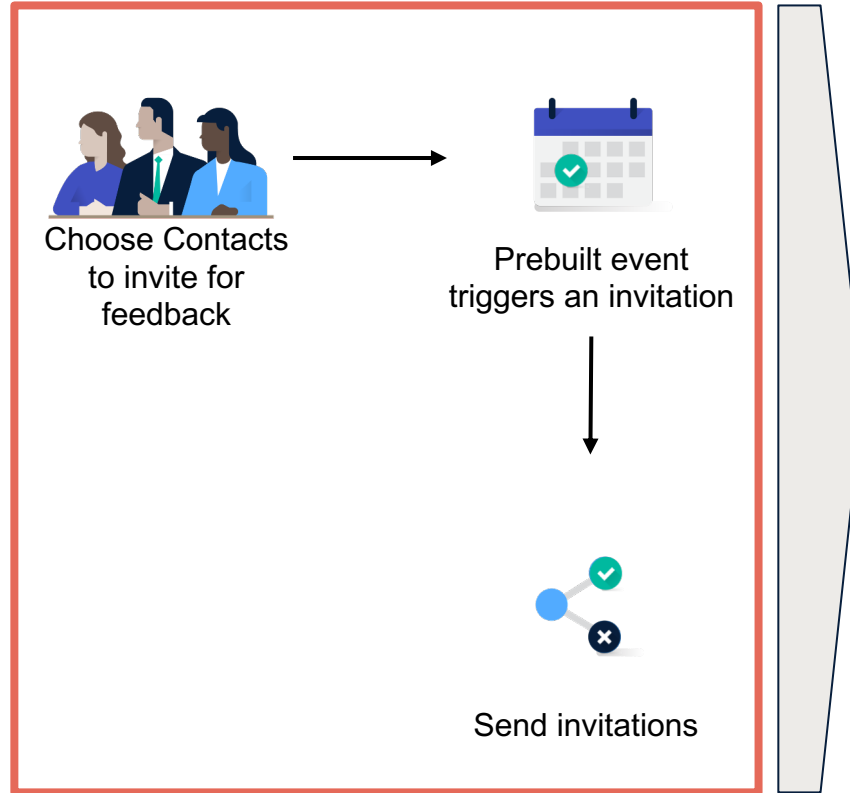Send invitations

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Invitation Management

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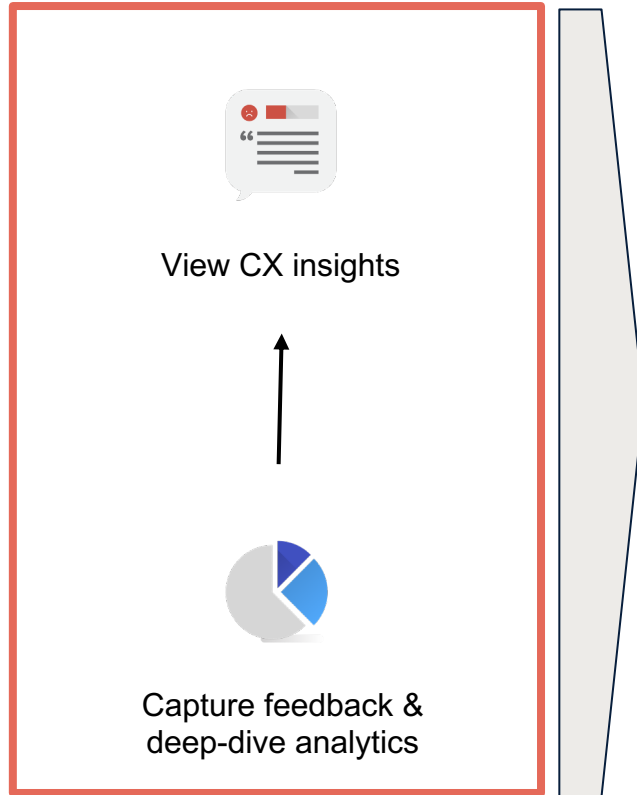Prebuilt event triggers an invitation

Send invitations

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

Insights Management

View CX insights
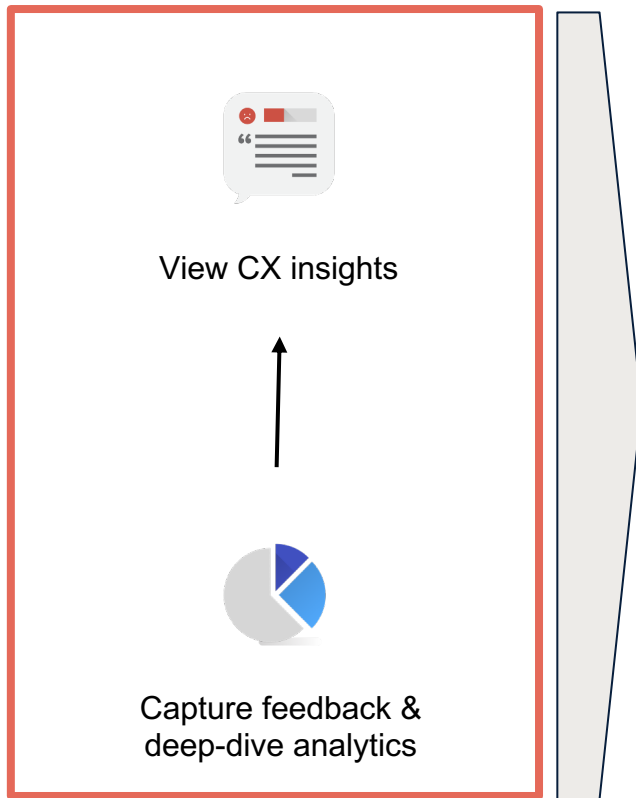
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Insights Management

View CX insights

Capture feedback &
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- Give your agents access to cross-organizational feedback from every customer while working cases in Service Cloud

- View cross-organizational feedback of the most relevant moments across an organization from individual Contacts and across an Account in Sales Cloud

- 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

- Identify and action on upsell and cross-sell opportunities directly from the voice of the customer
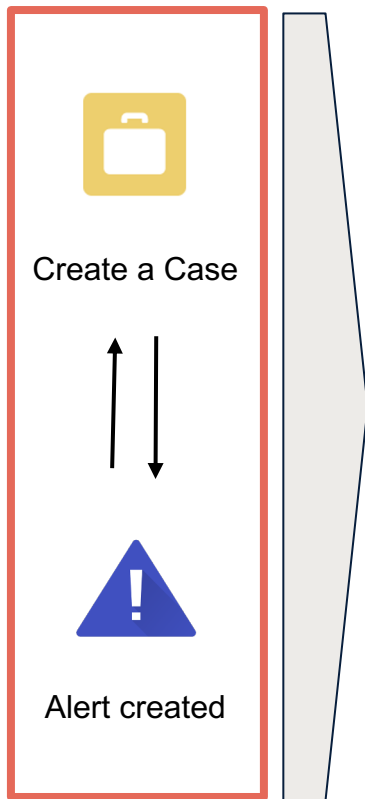
Closed Loop Management

Create a Case

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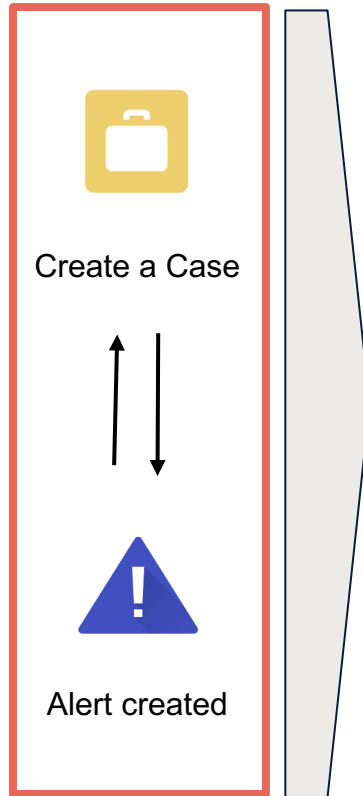
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Closed Loop Management

Create a Case

Alert created

- Sentiment-, AI-, and Text-based Alerts in Medallia open cases in Service Console to enable immediate follow-up with customers

- Flag potentially at-risk revenue to the right people with Salesforce Cases generated from a combination of Medallia Scores, Segments, AI, and TA
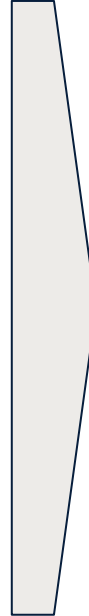
Bi-Directional Integration Powers Success

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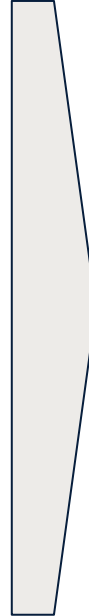Medallia

Bi-Directional Integration Powers Success

INVITATION MANAGEMENT

INSIGHTS MANAGEMENT

CLOSED LOOP MANAGEMENT

- Create an efficient workforce by breaking down data silos, enabling your people to action core workflows seamlessly without having to jump back and forth between systems

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

- Weave the customer into every interaction in order to weave the customer into the thoughts of your employees

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