



Navigator
by Medallia

Course Catalog



Medallia |  EDUCATION
& ENABLEMENT

At the heart of every successful organization are people. Equip your people with the skills they need to achieve your organization's strategic Experience goals. Medallia training professionals have extensive experience partnering with organizations and are committed to learner success and engagement.

Our Education Experts can:

- Provide targeted course recommendations for individual roles
- Create focused training plans to support upcoming projects
- Deliver highly engaging and relevant training across geographies and modalities

To talk with us about your organization's training needs, email edsales@medallia.com.



GLOSSARY OF TERMS

Learning Path - A series of courses sequenced together to address a large topic or concept.

Course - Focused content covering a specific topic.

Section and Lesson - Within a course, content is divided into Sections and each Section has lessons. Lessons are short, online, self-paced materials, allowing learners to explore the larger topics in smaller pieces.

Medallia Admin - Medallia Admins may be responsible for different parts of the MEC environment! From Survey administration to Reporting, to setting up the MEC Organization, creating Digital forms, or maintaining Text Analytics.

Medallia Professional - Medallia Professionals use and require data from MEC to glean insights and develop actions. Medallia Professionals may advise on program design and function but do not administer the MEC platform.

Quick Hit Library - A collection of short videos, configuration steps, and job aides to enable Medallia Admins on the go.

NEW AND UPDATED COURSES AND LEARNING PATHS

Medallia Admins may be responsible for different parts of the MEC environment! From Survey administration to Reporting to setting up the MEC Organization, creating Digital forms, or maintaining Text Analytics. Learning Paths are a curated series of courses geared toward helping Admins and other professionals learn and understand a specific area of MEC.

Explore these new and updated courses and learning paths!

JOURNEY OF A RECORD ESSENTIALS (learning path)

Signal data comes to the Medallia platform via four main pathways or journeys. In this learning path you can explore these four journeys to gain a deep understanding of how the MEC database creates and updates signal records for each journey.

(3hrs 15 mins) | Last updated: September 2023

IMPLEMENTING TRANSLATIONS IN MEC ADMIN SUITE (learning path)

Medallia Experience Cloud (MEC) Admin Suite supports translating surveys, reports, emails, and organizational hierarchies. Master the processes used to translate reports, emails, surveys, and organizational hierarchy content in MEC Admin Suite in this learning path.

(2 hours) | Last updated: July 2023

REPORTING - CREATING AND MANAGING ACTION PLANS IN MEC (course)

An Action Plan, part of Reporting within Medallia Experience Cloud (MEC), is a group of tasks designed to achieve a specific goal, usually based on feedback from respondents. Organizations can implement MEC Action Plans to align with the philosophy of accountability, ensuring both customers and employees are satisfied with their experiences.

(26 mins) | Last updated: January 2024

CONFIGURING AD HOC SURVEYS (course)

Quickly gather feedback about one-off events using Ad Hoc Surveys. In this course, you will explore the steps from creating your survey and email, uploading data, testing your survey, viewing responses, and sharing reports with others within MEC Admin Suite.

(55 mins) | Last updated: November 2023

FEATURED BADGES

Medallia offers a variety of badges allowing you to prove and showcase your skills and competencies with Medallia products. Each badge listed below is tied to a learning path consisting of courses and an exam used to demonstrate your understanding of the information presented. Badges are offered through Navigator and supported by Credly, an industry expert in badging, allowing you to share your badges on various platforms, such as LinkedIn and X.

PRACTITIONER BADGES

Practitioner badges focus on fundamental understanding and applying best practices when designing and using Medallia products.



Closed-Loop Practitioner

Earners of the Closed-Loop Practitioner badge understand the key elements of the Closed-Loop framework and can identify key components of alert configuration.



Journey of a Record Practitioner

Earners of the Journey of a Record Practitioner badge have demonstrated their understanding of how signal data comes into MEC via four main journeys and how the records are updated through the journey stages.



MXO Practitioner

Earners of the Medallia Experience Orchestration Practitioner badge have demonstrated their understanding of Medallia Experience Orchestration.



Reporting Design Practitioner

Earners of the Reporting Design Practitioner badge have demonstrated the ability to identify and implement reporting design best practices.



Survey Design Practitioner

Earners of the Survey Design Practitioner badge have demonstrated the ability to identify and implement survey design best practices.



Text Analytics Insights Practitioner

Earners of the Text Analytics Insights Practitioner badge have demonstrated the ability to gather valuable insights from Text Analytics Topics and Themes.

SPECIALIST BADGES

Specialist badges focus on the application of techniques to configure and manage Medallia products.



Medallia Digital Configuration Specialist

Earners of the Medallia Digital Feedback Configuration Specialist badge have demonstrated the ability to create a Medallia Digital Feedback form/survey and launch the form across your online presence.



MXO Specialist

Earners of the Medallia Experience Orchestration Specialist badge have demonstrated the ability to configure the MXO platform, including the common vocabulary and system architecture.



Survey Configuration Specialist

Earners of the Survey Configuration Specialist badge have demonstrated the ability to configure, test, and launch surveys using Admin Suite Surveys.



Translations Configuration Specialist

Earners of the Translations Configuration Specialist badge have demonstrated the ability to configure translations for surveys, emails, reporting, and organizational hierarchies using MEC Admin Suite Translations.



TOPIC SPECIFIC LEARNING PATHS

Explore Learning Paths focused on additional topics and areas of the MEC platform.

Getting Started with Medallia

(2 hours)

Getting Started with Medallia learning path is an immersive, scenario-based curriculum that shows you how MEC supports various employee roles – from Contact Center agents to executives—to power and optimize the customer experience operations for Springboard Inc., a fictional organization. In the courses, you work alongside Springboard’s employees to learn the hows, whats, and whys of the MEC solution.

To complete the learning path, you need to finish the following courses:

- *Introducing Springboard and this Program*
- At least two (2) of the employee courses
- *Finishing Up*

Configuring the Medallia for Salesforce App for the SFDC Admin

(2 hours)

Are you a SFDC Administrator responsible for configuring the Medallia for Salesforce App? Learn about the App and how to configure the App in order to leverage the voice of the customer and closed-loop feedback to extend the capabilities of both Salesforce Sales and Service Clouds. Note: This learning path explores introductory information about the App, installing and configuring the App, and leveraging the App within Salesforce.

Gathering Insights using Text Analytics

(90 mins)

Are you part of an Insights team needing to understand how Text Analytics (TA) can help you uncover trends, root causes, and impacts from your unstructured data? Do you need to understand how to manage and configure your TA program? Explore this learning path to get to know Text Analytics, understand how to manage your program, and gather insights.

Program Design for Closing the Loop

(1 hour)

Closing the loop describes the process by which an organization takes action on customer feedback. The inner closed-loop enables an organization to answer customer feedback in a timely fashion to resolve customer problems, acknowledge follow-up requests, and collect feedback from passive and promoter groups. The outer closed-loop leverages customer feedback to improve business processes and products, as well as gain insight into business issues. Explore the inner and outer closed-loops in this learning path.

Program Design for Reports

(2 hours)

When designed well, MEC Reporting offers a powerful way to deliver actionable feedback to drive insights and derive actions for your end-users. When creating your reports, it is vital to apply design techniques and strategies to create useful and usable reports. Explore best practices related to Reporting Design and apply UI/UX design principles to your MEC Reports.

Program Design for Surveys

(90 mins)

When designed well, MEC Surveys are a powerful way to receive actionable feedback to drive insights and derive actions for your program. When creating your surveys, it is vital to apply design techniques and strategies to create useful and usable surveys. Explore best practices related to survey design and apply these practices to your surveys. Complete the final exam to earn the Survey Design Practitioner badge!



COURSES FOR MEDALLIA PROFESSIONALS

Featured content for Medallia Professionals enables you to understand the Medallia software environment.

Core Platform

Explore the core areas of the Medallia Experience Cloud platform.

- Getting Started with Medallia
- Admin Concepts - Journey of a Record Overview

Change Management

Learn about Experience Change Management and explore a strategy for implementing an initiative.

- Thought Leadership - Introducing Experience Change Management
- Thought Leadership - Preparing for an Experience Change Management Initiative
- Thought Leadership - Evaluating an Experience Change Management Initiative
- Thought Leadership - Establishing a Communications Plan
- Thought Leadership - Establishing a Training Plan

TX Profiles

TX Profiles brings together omnichannel signals to give you a full 360 view of a customer's experiences in one.

- TX Profiles - Introducing TX Profiles

Medallia Ideas

Medallia Ideas is a real-time ideation platform that can help to inspire innovation within your company.

- Medallia Ideas - Introducing Medallia Ideas

Reports

Reports are tools that help us interpret data to drive decisions and actions.

- Reporting - Getting to Know Reporting
- Reporting - Using the Medallia Mobile and Voices Apps
- Reporting - Exploring the In-Dashboard Integrated Report Editor

Social

Use Medallia Social to collect and track public feedback from various sites and display it within MEC.

- Social - Get to Know Medallia Social
- Social - Medallia Social in the Customer Journey

Digital

Medallia for Digital gathers feedback from your digital channels, specifically web, mobile, and connected devices.

- Digital - Introducing Medallia for Digital

Medallia Concierge

Medallia Concierge is an enterprise messaging platform that enables businesses to communicate with customers via text and other mobile messaging channels for instant, on-demand customer service.

- Medallia Concierge - Introducing Medallia Concierge

Salesforce

Understanding your customer's operational, transaction, and experience data helps you gain insights into your customer relationships and drive closed-loop feedback actions.

- Salesforce - Getting to Know the Medallia for Salesforce App

Medallia Experience Orchestration

Medallia Experience Orchestration (MXO) is a unifying technology layer that listens, understands, and orchestrates customer journeys to enhance engagement over time.

- MXO - Engaging for a Changing World

Medallia Video Foundations

Medallia Video allows you to capture, analyze, and share video, audio, and images to provide rich insights and bring the customer voice to life.

- Medallia Video - Implementing Medallia Video Insights Suite
- Medallia Video - Implementing Medallia Video Experience Edition

Text Analytics

Medallia Experience Cloud Text Analytics helps you understand the “why” behind the numeric score.

- Text Analytics - Getting to Know Text Analytics
- Text Analytics - Gathering Insights from Text Analytics

Program Fundamentals & Thought Leadership

When well-designed, Medallia products and processes help provide reliable and actionable feedback to drive continuous experience improvements.

- CX Fundamentals - Designing Your Inner Loop Process
- CX Fundamentals - Designing Your Outer Loop Process
- Reporting - Introducing Medallia Reporting Design
- Reporting - Performing Discovery for Medallia Reporting
- Reporting - Designing Your Medallia Reports
- Surveys - Survey Design Fundamentals
- Surveys - Applying Survey Design Best Practices
- Surveys - Survey Design Case Studies
- Thought Leadership - Realizing the CX Value Framework
- Thought Leadership - Establishing a Communications Plan
- Thought Leadership - Establishing a Training Plan



FEATURED VIDEOS

Wondering how to perform a specific task or interested in exploring fundamental CX/EX concepts? Get answers via short, focused videos and PDFs within the Navigator Catalog.

ADMIN CONCEPTS - DIFFERENTIATING OSAT, LTR, AND NPS

(2 MINS)

Describes the fundamental differences between OSAT, LTR, and NPS while discussing how NPS is determined.

AD HOC SURVEYS - CONFIGURING AD HOC SURVEYS

(8 MINS)

This video will show you how to configure an Ad Hoc survey, from setting the design through to testing and deployment.

EMPLOYEE ENGAGEMENT INDEX

(2 MINS)

Explore the Employee Engagement Index and how it is calculated and used in EX programs.

ORGANIZATION - UNDERSTANDING UNITS

(2 MINS)

This video breaks down the concept of Units at Medallia to its most basic parts: the people, places, and things about which we collect feedback.

SURVEYS - WHAT IS A SURVEY

(1 MIN)

Have you ever wondered what a Medallia survey is and why we use them? Explore this short video to learn about Medallia surveys.

TEXT ANALYTICS - GETTING TO KNOW TEXT ANALYTICS

(5 MINS)

Explore the basics of Medallia's Text Analytics (TA) and learn about the differences between Topics and Themes!

TEXT ANALYTICS - NAVIGATING TA REPORTING

(5 MINS)

Use Text Analytics (TA) Reporting to analyze and visualize what customers are saying at scale. TA reports and dashboards help you understand your unstructured data and take action.

TRANSLATIONS - ACCESSING AND EXPLORING TRANSLATIONS IN ADMIN SUITE

(3 MINS)

Learn how to access and explore translations in Admin Suite.



FULL LIST OF COURSES

SYSTEM/PRODUCT: MEC

Product Area	Course Name
Admin Concepts	Admin Concepts - Journey of a Record Overview (updated)
	Admin Concepts - Exploring Surveys and Survey Journeys
	Admin Concepts - Exploring the Email-to-Web Survey Journey
	Admin Concepts - Exploring the Web Survey Journey
	Admin Concepts - Exploring the Product Signal Journey
Admin Suite Programs	Ad Hoc Surveys - Configuring Ad Hoc Surveys (updated)
	Experience Programs - Configuring Your Experience Programs
Alerts	Alerts - Configuring Alerts using Admin Suite
Data Fields	Admin Concepts - Exploring Types of Data Fields
Conversations	Conversations - Introducing Conversations
	Conversations - Building Your Conversation
	Conversations - Configuring a Channel
	Conversations - Creating Reporting for Your Conversations Feedback
TX Profiles	TX Profiles - Introducing TX Profiles
Integrations	Integrations - Processing External Data using Import Templates
	Integrations - Exporting MEC Data using Admin Suite
	Integrations - Understanding how MEC Integrates with External Data
	Integrations - Exploring Web API Basics
Organization	Organization - Defining Units, Unit Groups, and Unit Types in Admin Suite
	Organization - Creating Roles in Admin Suite
	Organization - Creating Users in Admin Suite

SYSTEM/PRODUCT: MEC CONT.

Product Area	Course Name
Reporting	Reporting - Getting to Know Reporting
	Reporting - Understanding Role-Based Reporting and Reporting Workflow
	Reporting - Creating Your Reports
	Reporting - Modifying Your Reports
	Reporting - Organizing and Publishing Your Reports
Sandboxes and Change Sets	Reporting - Customizing Your Report Control Panels and Filters
	Reporting - Using the Medallia Mobile and Voices Apps
Sandboxes and Change Sets	Sandboxes - Using the Sandbox Manager and Creating Change Sets
Social	Social - Get to Know Medallia Social (new)
	Social - Medallia Social in the Customer Journey (new)
Surveys	Surveys - Building Your Survey (updated)
	Surveys - Test, Update, and Launch Your Survey (updated)
	Surveys - Creating Your Invitation and Reminder Emails
	Surveys - Creating Your Desktop and Mobile Survey Designs
Translations	Translations - Learning the Fundamentals of Translations
	Translations - Translating Surveys
	Translations - Translating Reports
	Translations - Translating Emails
	Translations - Translating in Bulk
	Translations - Translating Organizational Hierarchies (new)

SYSTEM/PRODUCT: STRIKEDECK

Product Area	Course Name
Strikedeck	Strikedeck - Getting to Know Strikedeck
	Strikedeck - Integrating External Data within Strikedeck
	Strikedeck - Configuring Users and Roles
	Strikedeck - Building Tabs, Tiles, and Pods
	Strikedeck - Communicating via Email and Surveys
	Strikedeck - Automating CSM Tasks through Journeys, Playbooks, and Workflow Recipes
	Strikedeck - Configuring Health Scores, KPIs, and Metrics
	Strikedeck - Exploring Strikedeck (video)
	Strikedeck - Navigating Strikedeck (video)
	Strikedeck - Exploring the Customer 360 View (video)
	Strikedeck - Using Calendar, Timeline, and Support Tickets (video)
	Strikedeck - Understanding Health Scores (video)
	Strikedeck - Using Tasks (video)
	Strikedeck - Using Notes (video)
Strikedeck - Exploring Automation (video)	
Strikedeck - Using Strikedeck Reporting (video)	

SYSTEM/PRODUCT: MEDALLIA IDEAS

Product Area	Course Name
Medallia Ideas	Medallia Ideas - Introducing Medallia Ideas
	Medallia Ideas - Launching Your Community

SYSTEM/PRODUCT: TEXT ANALYTICS

Product Area	Course Name
Action Intelligence	Text Analytics - Getting to Know Action Intelligence
Text Analytics	Text Analytics - Introducing Text Analytics (updated)
	Text Analytics - Gathering Insights from Text Analytics (updated)
	Text Analytics - Managing Your Text Analytics Program (updated)
	Text Analytics - Creating and Optimizing Text Analytics Topics (updated)
Speech	Text Analytics - Examining Starter Sets and Reporting Packages (updated)
	Speech - Getting to Know Medallia Speech

SYSTEM/PRODUCT: MEDALLIA DIGITAL

Product Area	Course Name
Medallia Digital	Digital - Introducing Medallia for Digital (updated)
	Digital - Initiating Pre-Work and Technical Readiness (updated)
	Digital - Designing Your Survey Forms (updated)
	Digital - Building Your Survey Forms (updated)
	Digital - Creating Your Rules (updated)
	Digital - Creating Your Custom Parameters (updated)
	Digital - Configuring Basic Targeting (updated)
	Digital - Performing UAT and Launching Your Survey (updated)
	Digital - Viewing Your Medallia for Digital Feedback (updated)
	Digital - Implementing a Mobile SDK (updated)
	Digital - Configuring Medallia Digital for Connected Devices (updated)
	Digital - Medallia Digital Configuration Specialist Exam (updated)

SYSTEM/PRODUCT: MEDALLIA EXPERIENCE ORCHESTRATION (MXO)

Product Area	Course Name
MXO	MXO - Engaging for a Changing World (updated)
	MXO - Using the Functional Layers of MXO (updated)
	MXO - Getting Started with Experience Orchestration (updated)
	MXO - Building a Common Vocabulary (updated)
	MXO - Defining Objective-Led Use Cases (updated)
	MXO - Building Real-Time Orchestration Strategies (updated)
	MXO - Enhancing Orchestration for Identified Customers (updated)

SYSTEM/PRODUCT: MEDALLIA VIDEO

Product Area	Course Name
Medallia Video	Medallia Video - Implementing Medallia Video Feedback (updated)
	Medallia Video - Implementing Medallia Video Experience Edition (updated)

SYSTEM/PRODUCT: SOLUTIONS

Product Area	Course Name
Salesforce	Salesforce - Getting to Know the Medallia for Salesforce App
	Salesforce - Installing the App for the SFDC Admin
	Salesforce - Configuring the Medallia for Salesforce App
	Salesforce - Leveraging the Medallia for Salesforce App

SYSTEM/PRODUCT: MEDALLIA CONCIERGE

Product Area	Course Name
Medallia Concierge	Medallia Concierge - Introducing Medallia Concierge
	Medallia Concierge - Setting Up Your Service

CX PROGRAM FUNDAMENTALS AND THOUGHT LEADERSHIP

CX Program Area	Course Name
Getting Started with Medallia	Getting Started - Introducing Springboard and the Program
	Getting Started - Working with Tarek, a Contact Center Agent
	Getting Started - Working with Betty, a Contact Center Lead
	Getting Started - Working with Gabriel, an Insights Manager
	Getting Started - Working with Deven, a District Store Manager
	Getting Started - Working with Deven, a District Store Manager
	Getting Started - Working with Jackie, a VP of Sales
	Getting Started - Working with Elaine, a MEC Administrator
	Thought Leadership - Realizing the CX Value Framework
	CX Practices - The Signals to Action Approach
CX Fundamentals	CX Practices - The Certification Learning Path
	CX Practices - Develop a Comprehensive View
	CX Practices - Ensure Trustworthy Data
	CX Practices - Integrate Data and Systems
	CX Practices - Quantify Business Impact
	CX Practices - Prioritize Improvement Opportunities
	CX Practices - Predict Experiences and Outcomes
	CX Practices - Engage Leaders at Every Level
	CX Practices - Make Customer Data Pervasive
	CX Practices - Embed Customer-Centric Behaviors
CX Practices - Establish Clear Ownership for Actions	
CX Practices - Tailor Responses to Close the Loop	
CX Practices - Innovate Continuously	
CX Practices - Medallia CX Certification Review	

CX PROGRAM FUNDAMENTALS AND THOUGHT LEADERSHIP

CX Program Area	Course Name
Survey Design	Surveys - Survey Design Fundamentals
	Surveys - Applying Survey Design Best Practices
	Surveys - Survey Design Case Studies
Reporting Design	Reporting - Introducing Medallia Reporting Design (updated)
	Reporting - Performing Discovery for Medallia Reporting (updated)
	Reporting - Designing your Medallia Reports (updated)
Closed Loop Feedback Design	CX Fundamentals - Designing Your Inner Loop Process
	CX Fundamentals - Designing Your Outer Loop Process
Experience Change Management	Thought Leadership - Introducing Change Management
	Thought Leadership - Preparing for an Experience Change Management Initiative
	Thought Leadership - Evaluating an Experience Change Management Initiative
	Thought Leadership - Establishing a Communications Plan
Deriving Insights	Thought Leadership - Establishing a Training Plan
	Thought Leadership - Realizing the CX Value Framework

MEDALLIA BADGES

Type	Name
Practitioner	Closed-Loop Practitioner
	Journey of a Record Practitioner
	MXO Practitioner
	Reporting Design Practitioner
	Survey Design Practitioner
Specialist	Text Analytics Insights Practitioner
	Medallia Digital Configuration Specialist
	MXO Specialist
	Survey Configuration Specialist
	Translations Configuration Specialist

NAVIGATOR LIVE — ON DEMAND

Using Matrix, Ranking Order, and File Upload Question Types
Advanced Survey Build
Medallia API Capabilities
Alerts and Case Management
Calculations
Medallia Digital
Advanced Medallia Digital
Push Reports
Organizational Hierarchy
Sensitive Data
Configuration Hygiene and Change Management
Handoffs and Data Dictionaries and Specs, oh my!
Pulling the Curtain Back: Text Analytics
Topic Building in Text Analytics
A Tour Through Medallia HealthWatch Reports
Pulling the Curtain Back: Digital Experience Analytics
Ask When? Ask Now
Employee Experience: Introduction to EX and Reporting
Employee Experience: Navigating EX Program Considerations
Pulling Back the Curtain: Medallia Experience Orchestration (MXO)
Digital Experience: Analyzing Page Experiences using Medallia DXA
TX Profiles: Connecting One's Past to Brighten Their Future