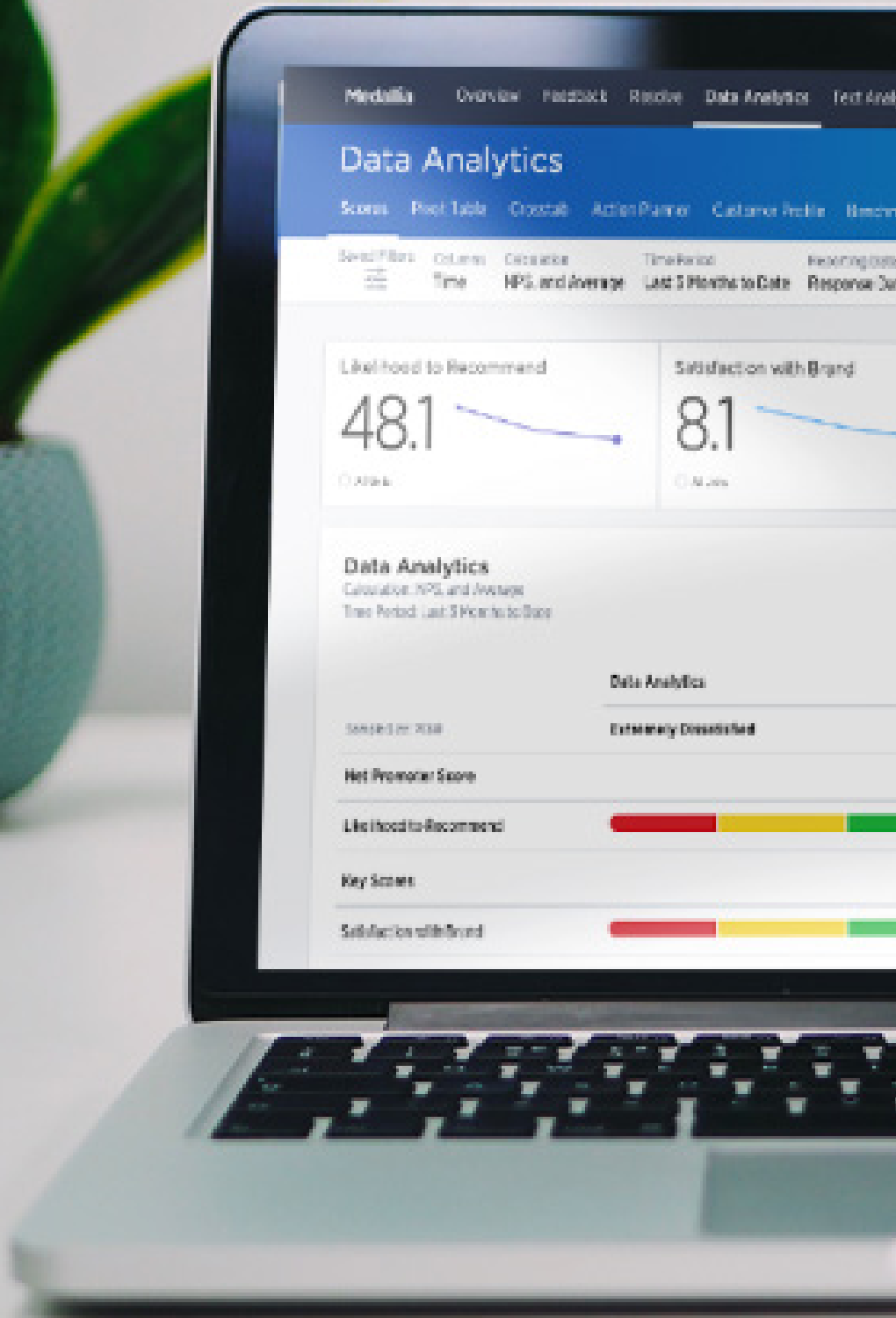


# Medallia Training **2020-2021**

Training on the Customer  
Experience Platform  
Medallia Course Catalog

Online Courses  
Instructor-Led Courses  
Virtual Instructor-Led Courses



## Getting Started with Medallia

Master the fundamentals of Experience Management with Medallia. [Core Platform Foundations Badge](#)

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.

- 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 [education@medallia.com](mailto:education@medallia.com).

## Get to Know Crowdicity

Crowdicity is a real-time ideation platform that enables customers to discover great ideas from employees, customers, and partners. This module introduces you to the Crowdicity platform and how you can use it to inspire innovation. [Crowdicity Badge](#)

## Learn Your Crowdicity Community

It's important to understand your role as the Crowdicity platform administrator for your organization. This course shows you how to set up Crowdicity so you can start crowdsourcing ideas in your experience program quickly and efficiently. [Crowdicity Badge](#)

## Strikedeck

Understand how the key elements of Medallia fit together, including the variety of Medallia product suite and their common uses. [Strikedeck Badge](#)

## Zingle Foundations

Zingle 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. This module describes the administrator's responsibilities for getting the Zingle platform up and running. [Zingle Badge](#)

[Get to Know Zingle](#)

[Get Set Up on Zingle](#)

## LivingLens

LivingLens allows you to capture, analyze, and share video, audio, and images to provide rich insights and bring the customer voice to life. This module teaches users how to navigate the LivingLens platform. [LivingLens Badge](#)

[Using LivingLens Insights Suite](#)

[LivingLens Experience Edition](#)

## Administrator Concepts

Admin Suite enables you to manage key components of MEC, such as surveys and reports. The curriculum teaches how to navigate Admin Suite and familiarize yourself with the data structure within Medallia Experience Cloud (MEC).

Administrator Certification

Navigate Medallia  
Data Fields

## Organization

Organization is the MEC setup building blocks that enable you to create, update, and manage Medallia users. The curriculum teaches key user account-related product features and functionality.

Units, Unit Groups, Unit Types  
Roles  
Users

## Surveys

Learn how to create, update, and manage Medallia surveys. The curriculum teaches key survey-related product features and functionality.

Build a Survey  
Launch a Survey  
Desktop and Mobile Designs  
Invitation and Reminder Emails

## Programs

Learn how to use Programs to create and easily send out surveys to a list of respondents and view quickly view the survey results.

Understand Programs

## Translations

Learn how to globalize your surveys and reporting dashboards with scalable translation tools

Surveys and Reporting

## Reports

Learn about what types of reports are available in Medallia and the building blocks of setting up role-based modular real-time reports with dynamic filtering.

Overview of MEC Reporting  
MEC Report Types  
Standard Reports  
Dashboards  
Control Panel and Filters

## Integrations

Learn how to integrate Medallia with external systems, download and import data. The curriculum teaches key integration and data management - related product features and functionality.

Imports  
Exports

## Sandboxes

Learn how to leverage MEC Sandboxes and Change Sets to safely develop and migrate changes from your test environment to the live system.

SandboxManager and Change Sets

## Design

When well-designed, Medallia product and processes help provide reliable and actionable feedback to drive continuous experience improvements. This curriculum will help you operationalize key design elements of Medallia to get the most out of your program.

Surveys  
Reports  
'Inner' Closed Loop  
'Outer' Closed Loop  
Designing Reports for Operational Users

# Courses for Administrators (cont'd)

## OCEM

In today's transparent and information-rich environment, extracting insights from customer data is critical. But insights only make an impact when you take action on them. That's where Operational Customer Experience Management makes the difference. It's a methodology that accelerates your organization's ability to anticipate and adapt to changing customer needs. This two-level certification program will teach you and your team a proven approach to:

- Transform customer experience insights into actions
- Align teams around the customer's needs
- Accelerate internal learning and improvement
- Differentiate and adapt ahead of the market

[OCEM Level 1](#)

[OCEM Level 2](#)

## Text Analytics

Medallia Experience Cloud Text Analytics helps you understand the "why" behind the numeric score. In these courses, you will learn how it works, how to set it up, and how to manage it ongoing. [Text Analytics Badge](#)

[Introduction to Text Analytics](#)

[Create and Optimize Text Analytics Topics](#)

[Configure Text Analytics](#)

[Examine Text Analytics Starter Sets](#)

[Derive Insights Through Text Analytics](#)

[Manage a TA Program](#)

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LivingLens Experience Edition](#)

## Digital

Medallia for Digital gathers feedback from your digital channels, specifically web, mobile, and connected devices. This course teaches Medallia Administrators how to create and customize new survey forms, configure rules to determine who will see them, and access reports to view the Medallia for Digital feedback. [Digital Badge](#)

[Build Survey Forms](#)

[Configure Basic Targeting](#)

[Create Custom Parameters](#)

[Create Rules](#)

[Design Survey Forms](#)

[Introduction to Medallia for Digital](#)

[Launch Survey Forms](#)

[View Reporting](#)

# Courses for Administrators (cont'd)

## Administrator II

Administrator II is a learning path focused on the advanced features and technical capabilities of the Medallia system.  
Pre-requisite: Completion Administrator coursework.

## Data Management

Learn how to integrate Medallia with external system, download and import data. This curriculum teaches key integration and data management-related product features and functionality.

**Integrations: Exports**

**Integrations: Imports**

**Integrations: Introduction to MEC API**

**Integrations: Web API Basics**

## Surveys - Advanced Build

Learn how to configure more advanced surveys including Postconditioning and Additional Validation to validate survey information entered by survey takers.

**Postcondition**

**Additional Validation**

**Ad Hoc Distribution**

## Value Framework

This series will introduce learners to a six part Value Framework that helps companies successfully apply CX principles to derive more value from their program. Learners will explore in detail the elements of this framework while learning how to operationalize it according to different customer scenarios.

**Introduction to the Value Framework**

**Operationalize Framework**

**Adapt Value Framework**

## CX Profiles

In the effort to shift from a "touchpoint-centric" view to one that is "customer-centric," CX Profiles displays high-level customer information related to past concerns, scores, and trends in one easy-to-reference location. In this course, you will learn how to configure each of CX Profiles' nine modules in order to provide a 360-degree view of a customer's experience.

### Understand CX Profiles

## Reports

An introduction to Medallia Mobile and Voices apps with use cases for how these apps support employee mobility in the workplace.

### Medallia Mobile Applications

# Courses for Practitioners

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[Getting Started with Medallia](#)

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[Surveys](#)

[Reports](#)

[‘Inner’ Closed Loop](#)

[‘Outer’ Closed Loop](#)

[Designing Reports for Operational Users](#)

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Online Training

Overview

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## Introduction to Digital

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[Introduction to Medallia for Digital](#)

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[Find Out More about Medallia Training](#)

For the latest class schedules, detailed course information, and to register for courses, please contact [education@medallia.com](mailto:education@medallia.com)