

Navigator Course Catalog Autumn 2023



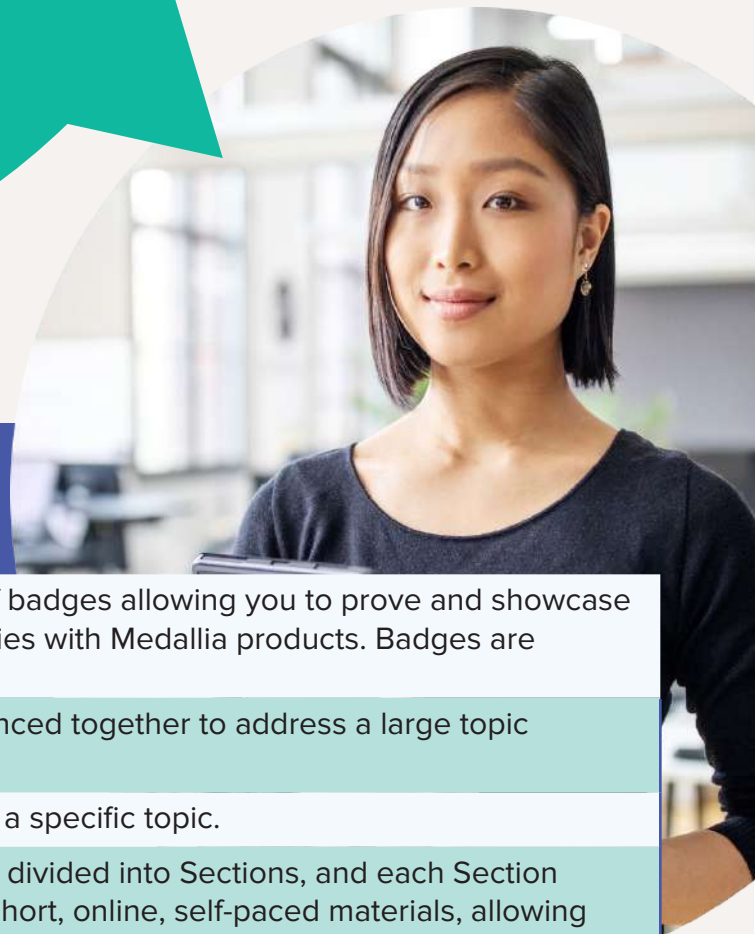
Navigator
by Medallia

At the heart of every successful organization is 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

Badge	Medallia offers a variety of badges allowing you to prove and showcase your skills and competencies with Medallia products. Badges are supported through Credly
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.
MEC	Medallia Experience Cloud
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 MEC to derive insights and take data-driven actions. Medallia Professionals may advise on program design and functionality, 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 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, and even maintaining Text Analytics. Learning Paths are a curated series of courses geared toward helping Admins and other professionals learn and understand specific areas of MEC.

Explore the new and updated courses and learning paths as of August 2023!

BUILDING SURVEYS IN ADMIN SUITE LEARNING PATH

The Building Surveys in Admin Suite learning path has been updated with the completely new Building Your Surveys course and the Test, Update, and Launch Your Surveys course!

Both of these brand new courses feature a brand new learning experience, filled with videos showing you how to perform tasks and simulations allowing you to try techniques in a safe, guided environment.

DESIGNING YOUR INNER-LOOP PROCESS & DESIGNING YOUR OUTER-LOOP PROCESS COURSES

Recently updated, the Inner-Loop and Outer-Loop Process courses dive into the importance of closing the loop with your customers and leveraging customer feedback to improve business processes.

The inner-loop course explores how developing an inner-loop process helps to resolve customer problems, acknowledge follow-up requests, and collect feedback from passive and promoter groups. Designing a strong inner closed-loop program allows you to operationalize key elements of closing the loop with your customers.

The outer-loop course focuses on understanding the benefits of well-designed outer closed-loop programs, showing you how to operationalize key elements of the closed-loop framework and leverage program design thought leadership to derive value from the outer closed-loop process.

MEDALLIA EXPERIENCE ORCHESTRATION (MXO) LEARNING PATHS

Medallia Experience Orchestration (MXO) is a unifying technology layer that listens, understands, and orchestrates customer journeys to enhance engagement over time. The MXO platform orchestrates relevant and timely individualized content for customers across all channels and touchpoints where a customer may choose to interact with a brand.

In the first MXO learning path (Foundations of MXO), learn how the MXO platform can enhance customer engagement for your brand. Once you have completed the Foundations of MXO learning path, move into the Essentials of MXO learning path to dive deeper into the MXO platform and review use cases.

JOURNEY OF A RECORD ESSENTIALS LEARNING PATH

Signal data comes to the Medallia platform via four main pathways or journeys. This learning path explores how the MEC database creates records for each journey and how the records are updated as the signal moves through the journey stages.

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 (formerly known as Twitter.)

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.



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.

SHARE BADGES ON YOUR SOCIAL PROFILE

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.



TOPIC SPECIFIC LEARNING PATHS

Explore Learning Paths focused on additional MEC topics and other Medallia products.

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 explores 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 and 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!

Implementing Translations in MEC Admin Suite

(2 hours)

Used by organizations around the world, Medallia Experience Cloud (MEC) must support the customers and employees in their native language. Many organizations can face fines or legal action if they fail to provide adequate translations of their surveys and reporting! MEC supports translating surveys, reports, emails, and organizational hierarchies to meet your customers where they are. Master the processes used to translate reports, emails, surveys, and organizational hierarchy content in MEC Admin Suite in this learning path.



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

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

Conversations

Medallia Conversations enables you to send and receive feedback through SMS and messaging channels.

- Conversations - Introducing Conversations

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 - Exploring Report Types
- Reporting - Using the Medallia Mobile and Voices Apps
- Reporting - Introducing Reporting Design
- Reporting - Performing Discovery for Reporting Design
- Reporting - Designing Your Medallia Reports

Social

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

- Social - Introducing Medallia Social Media

Digital

Medallia for Digital gathers feedback from your digital channels, specifically web, mobile, and internet 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



FEATURED QUICK HITS

Wondering how to perform a specific task in Medallia Experience Cloud? Get quick answers with short, how-to videos and configuration steps via the Quick Hit Library.

ADMIN CONCEPTS - DIFFERENTIATING OSAT, LTR, AND NPS

- Describes the fundamental differences between OSAT, LTR, and NPS while discussing how NPS is determined. (2 mins)

ADMIN CONCEPTS - NAVIGATING THE ADVANCED SETUP UI

- Are you new to Medallia's Advanced Setup? Learn how to navigate the main configuration areas of Advanced Setup. (3 mins)

SURVEYS - CUSTOMIZING TEXT AND VISUAL IMAGERY

- Discover ways to enrich your survey questions and answer sets with distinct text and imagery. (2 mins)

ALERTS - CONFIGURING BUSINESS DAYS IN ADMIN SUITE

- Learn how to specify days of the week that should not trigger alerts for your employees in Admin Suite. (1 min)

ALERTS - CONFIGURING HOLIDAY CALENDARS IN ADMIN SUITE

- Learn how to specify when alerts should not be triggered based on specific holiday days for your organization in Admin Suite. (2 mins)

AUTO IMPORTER - INITIALIZING YOUR AUTO IMPORTER

- Initializing your Auto Importer requires an understanding of the file options and processor types. Explore the initialization options in this short video. (3 mins)

EMPLOYEE ENGAGEMENT INDEX

- Explore the Employee Engagement Index and how it is calculated and used in EX programs. (2 mins)

MEDALLIA IDEAS - INTRODUCING MEDALLIA IDEAS

- Learn about the three types of user permissions in Medallia Ideas and get an overview of the Community Home, Challenges, People, and Blog pages. (4 mins)

ORGANIZATION - UNDERSTANDING UNITS

- 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. (2 mins)

SURVEYS - WHAT IS A SURVEY

- Have you ever wondered what a Medallia survey is and why we use them? Explore this short video to learn about Medallia surveys. (1 mins)

SURVEYS - SURVEY DESIGN FOR BUSINESS IMPACT

- Explore why Survey Design is important when building your Medallia surveys. (3 mins)

TRANSLATIONS - ACCESSING AND EXPLORING TRANSLATIONS IN ADMIN SUITE

- Learn how to access and explore translations in Admin Suite. (3 mins)

TRANSLATIONS - ADDING AND EDITING A TRANSLATION LANGUAGE IN ADMIN SUITE

- Explore adding and editing a translation language in Admin Suite. (3 mins)

TRANSLATIONS - FINDING A TEXT STRING TO TRANSLATE IN ADMIN SUITE

- Learn how to find a text string to translate in Admin Suite. (2 mins)



FULL LIST OF COURSES

SYSTEM/PRODUCT: MEC

Product Area	Course Name
Admin Concepts	Admin Concepts - Journey of a Record
	Admin Concepts - Exploring Surveys and Survey Journeys (new)
	Admin Concepts - Exploring the Email-to-Web Survey Journey (new)
	Admin Concepts - Exploring the Web Survey Journey (new)
	Admin Concepts - Exploring the Product Signal Journey (new)
	Admin Concepts - Exploring the External Signals Journey (new)
Admin Suite Programs	Ad Hoc Surveys - Configuring Ad Hoc Surveys
	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 [Updated]
	Organization - Creating Roles in Admin Suite [Updated]
	Organization - Creating Users in Admin Suite [Updated]

SYSTEM/PRODUCT: MEC CONT.

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

SYSTEM/PRODUCT: STRIKEDECK CONT

Product Area	Course Name
Strikedeck	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 Video (video)	
	Strikedeck - Exploring Automation (video)
	Strikedeck - Using Strikedeck Reporting (video)

SYSTEM/PRODUCT: TEXT ANALYTICS

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

SYSTEM/PRODUCT: MEDALLIA IDEAS

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

SYSTEM/PRODUCT: MEDALLIA DIGITAL

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

SYSTEM/PRODUCT: MEDALLIA EXPERIENCE ORCHESTRATION (MXO)

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

SYSTEM/PRODUCT: MEDALLIA VIDEO

Product Area	Course Name
Medallia Video	Medallia Video - Implementing Medallia Video Insights Suite
	Medallia Video - Implementing Medallia Video Experience Edition

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)
CX Fundamentals	CX Practices - The Signals to Action Approach
	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	Introducing Medallia Reporting Design (new)
	Reporting - Performing Discovery for Medallia Reporting (new)
	Reporting - Designing your Medallia Reports (new)
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
	MXO Practitioner
	Reporting Design Practitioner
	Survey Design Practitioner
	Text Analytics Insights Practitioner
Specialist	Medallia Digital Configuration Specialist
	MXO 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