

Case Study



# Salesforce Surveys

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# What is it about?

Salesforce surveys is an **enterprise feedback** management solution that allows **companies** to **collect, manage & act** on the feedback from their **customers**.

## Enterprise Feedback

### Surveys

Customer Satisfaction Score (CSAT)

Net Promoter Score (NPS)

### Use Cases

Customer Experience

B2B Experience

Employee Experience

### Doesn't Focus On

Market research

Polls

Quizzes



**BACKGROUND**

**What is Salesforce ?**



 **BRINGS  
COMPANIES** & **CUSTOMERS  
TOGETHER**



# Salesforce Customer 360

## World's #1 CRM

Integrated Platform & Best in Class Apps

## Single Source of Truth

Connect Sales, Service, Marketing, Commerce, & IT

## Fast Time to Value

Ease of Design & Implementation

## Scalable & Flexible Platform

Solutions for Any Size Company or Industry



**BACKGROUND**

**The missing piece...**



## THE MISSING PIECE!

Businesses using Salesforce **lacked** a way to **understand** their **customers & employees** sentiment & satisfaction.



B2C Customers



B2B Customers



Employees

## THE MISSING PIECE!

**73%** of customers expect businesses to understand their needs but only **51%** of them say that businesses do.



B2C Customers

## THE MISSING PIECE!

**90%** of B2B leaders say customer experience is crucial to their company's strategic priorities but only **20%** of them excel at it.



B2B Customers

## THE MISSING PIECE!

**84%** of companies believe the employee experience is important  
but only **9%** are equipped to address it.



Employees

**BACKGROUND**

# Addressing the need!



# Introducing Salesforce Surveys!

The screenshot displays the Salesforce Survey Builder interface for a questionnaire titled "NPS - Store Experience". The interface is divided into three main sections: a left-hand navigation pane, a central design canvas, and a right-hand settings panel.

**Navigation Pane (Left):** Shows the survey structure with sections and questions. The "Content" tab is active. The structure is as follows:

- BEGIN
- 1. Welcome
- SECTION 1
- 2. NPS
- SECTION 2
- 3. Thank Promoters
- 4. Thank Passives
- 5. Thank Detractors
- END

**Design Canvas (Center):** Shows the visual layout of the survey. It is divided into three sections:

- BEGIN:** A white box containing the text: "Hello ([Contact.FirstName](#))! Thank you for shopping at Outfitters. We have a few questions we'd love you to answer. This'll take less than a minute, and it'll help us create a delightful experience for everyone."
- SECTION 1:** A white box containing a question: "How likely is it that you would recommend Outfitters to a friend or colleague?". Below the question is a 11-point Likert scale with buttons for 0, 1, 2, 3, 4, 5, 6, 7, 8, 9, and 10. The scale is labeled "not likely" at the 0 end and "extremely likely" at the 10 end. There are also three dots and two icons (print and delete) at the bottom right of the question box.
- SECTION 2:** A white box containing the text: "Thanks for your feedback. It's great to hear that you're a fan of Outfitters. Your feedback helps us discover new opportunities to improve and make sure you have the best possible experience. [Refer your friends](#) and get 10% off on your next purchase."

**Settings Panel (Right):** Contains "Question Settings" for the selected question:

- Required Question:
- Description:
- Image: [Insert](#)
- Branch: [Edit Rules](#)
- Responses: [Edit Mapping](#)
- Tasks: [Edit List](#)

**Top Bar:** Includes navigation icons, "Survey Builder", "Questionnaire", "NPS - Store Experience", "Help", and "Settings" icons. Below the top bar are "Insert", "Activate", "Preview", and "Save" buttons.

# TEAM & TIMELINES

October 2018 to Present | 6 major releases | 14 Engineers

**Sam**  
Design Lead

**Malhar**  
Design Manager

**Anoop**  
Product Manager

**Kranti**  
Product Manager

**Aaron**  
Go To Market

**Alekhya**  
Writer

## My Role

Part of this project right from the beginning & lead the design efforts from scratch.

Enabled collaboration across product, marketing & engineering teams through design sprints & customer journeys.

# DESIGN PROCESS

At the start of each release we would revisit the roadmap with leadership team, conduct design sprints, talk to customers & solve for the customer's needs.



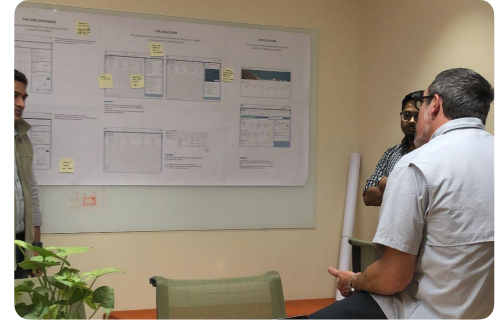
## Design Sprints

2 or 3 day design sprint with all the stakeholders. Focusing on three how might we statements



## Customer Calls

Facilitated by the Go To Market team, we would speak to existing & prospective customers



## Design Reviews

Reviews with leadership team and subject matter experts from specific industries

**SALESFORCE SURVEYS**

**Design Directions**

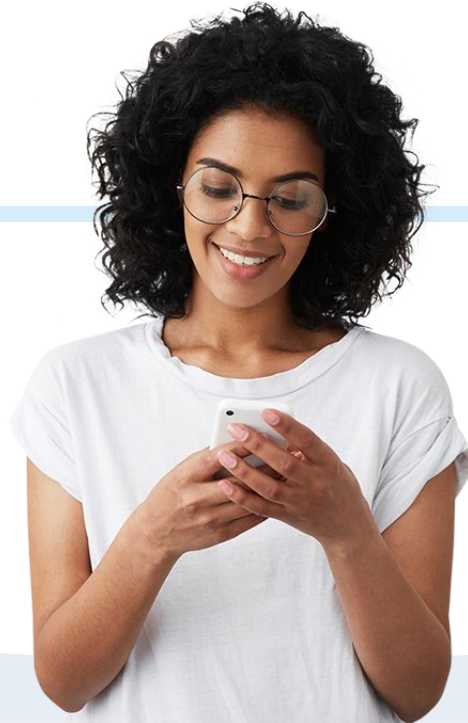


## DEEP DIVE INTO PROBLEM STATEMENT

# The enterprise feedback experience today falls short!

### Survey Invitation

Company wants customer feedback, sends a survey to a list of customers.



### Data Collection

Collects feedback, finds that a set of customers are unhappy & addresses it generically in isolation.

ENTERPRISE FEEDBACK EXPERIENCE TODAY FALLS SHORT

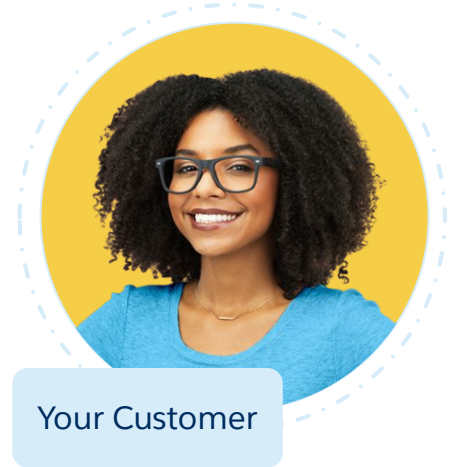
## Feedback in isolation prevents meaningful action



Surveys sent at wrong times

Out of context survey results

Generic feedback & follow up



## DESIGN DIRECTION: SOLUTION

# Contextualize feedback across customer touch points



### Meaningful

Send personalised surveys to the right customers after any interaction



### Enriching

Relate back the survey results contextually to the exact customer & event



### Impactful

Create meaningful follow-up actions that close the feedback loop

## DESIGN DIRECTION: FEATURE SET

# Contextualize feedback at every stage of a relationship

### Survey Builder

Branded surveys, branching logic

### Customer Lifecycle Maps

Create lifecycle maps with stages & tie surveys to each stage

### Integrations & Analytics


Integrations with Salesforce apps & analytics dashboards, reports

### Merge Fields

Push Salesforce data into survey content

### Data Mapper

Map responses back to Salesforce objects & create follow up actions



Employees, B2B and B2C Customers

**SALESFORCE SURVEYS**

**Customer Journeys**



# Meet Angela

Head of Customer Experience

Outfitters reopened their retail apparel store after the lockdown.

She wants to know if their customers who visited the store felt safe & if they would recommend others to visit.



# Angela opens salesforce & navigates to surveys app

The screenshot displays the Salesforce Home Page interface. At the top, there is a navigation bar with the Salesforce logo, a search bar, and utility icons. Below this is a main navigation menu with tabs for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, and Surveys (highlighted with a red box). The main content area is divided into several sections:

- Manage Store:** A grid of six cards for managing store operations: Products, Categories, Price books, Search, Buyer Groups, and Administration.
- Top Mentions:** Three horizontal bar charts showing mentions for Competitors, Products, and Automatic Insights, categorized by Phone Calls and Video Calls.
- Calendar:** A sidebar on the right showing a calendar for Wednesday, August 19, 2020, with several events listed.

## Manage Store



### Products

Manage your store's categories



### Categories

View store categories



### Price books

View your store's price books



### Search

Optimize your site search



### Buyer Groups

View your store's buyers



### Administration

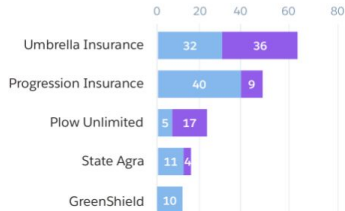
Manage your store details & configurations

## Top Mentions

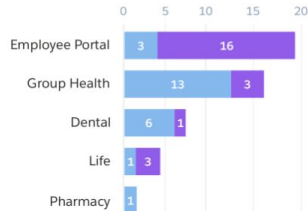
● Phone Calls ● Video Calls

[View All Mentions](#)

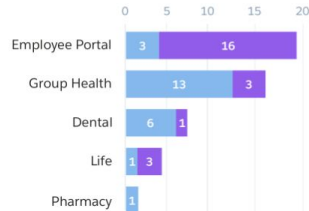
### Competitors



### Products



### Automatic Insights



## Calendar

News Tasks

Wednesday, August 19, 2020

### Employee App Demo

Presidio Tech  
9:00am-10:00am

### Deal Review

Advanced Communications  
10:30am-11:30am

### Break

12:00pm-12:30pm

### Discovery and Qualification Call

Michelle Jeffrey  
1:00pm-2:00pm

### RFP Team Meeting

Bruce Watkins  
2:30pm-3:00pm

### Sales Presentation

Martin's Supply Co.  
3:30pm-4:30pm

### Chat with Michelle

Martin's Supply Co.

# then, she clicks on create survey

The screenshot shows the Salesforce Surveys interface. At the top, there is a navigation bar with the Salesforce logo, a search bar, and various utility icons. Below this is a main navigation menu with tabs for Sales, Home, Opportunities, Leads, Tasks, Files, Accounts, Contacts, Campaigns, Dashboards, Reports, and Surveys. The 'Surveys' tab is active. The main content area is titled 'Surveys Recently Viewed' and shows a list of 8 surveys. A blue 'Create Survey' button is highlighted with a red box in the top right corner of the list area. The survey list has columns for Survey Name, Owner, Last Modified, and Status.







	SURVEY NAME	OWNER	LAST MODIFIED	STATUS
1	<input type="checkbox"/> <a href="#">Product Feedback</a>	Heather Clark	08/17/2020	Active
2	<input type="checkbox"/> <a href="#">NPS 2020</a>	Tua Manuera	03/21/2020	Active
3	<input type="checkbox"/> <a href="#">Employee Annual Sentiment</a>	Beulah Foster	07/22/2020	Draft
4	<input type="checkbox"/> <a href="#">Voice of Customer 2020</a>	Clayton Barker	01/21/2020	Active
5	<input type="checkbox"/> <a href="#">Re-Branding Opinions</a>	Lina Padilla	07/21/2020	Draft
6	<input type="checkbox"/> <a href="#">Post Event Feedback</a>	Franklin Cross	05/15/2020	Draft
7	<input type="checkbox"/> <a href="#">Customer Service Feedback</a>	Charles Hernandez	08/09/2020	Active
8	<input type="checkbox"/> <a href="#">Employee Satisfaction</a>	Lulu Thompson	01/05/2020	Active




# Starts with a NPS Template

← Survey Builder ? Help ⚙

### Pick a Template

 <p>Start from Scratch</p>	 <p>Net Promoter Score</p>	 <p>Customer Satisfaction</p>
 <p>Onboarding Feedback</p>	 <p>Employee Wellbeing</p>	 <p>Product Quality</p>

NPS - Store Experience [Create Survey](#)



# Angela begins to modify the template

← Survey Builder Questionnaire ▾ NPS - Store Experience ? Help ⚙

↶ ↷ Insert Activate Preview Save

**Content** Design

BEGIN

- Welcome

SECTION 1

- NPS
- Paragraph

SECTION 2

- Thank You

END

BEGIN

| Type welcome message here...

...

SECTION 1

**How likely is it that you would recommend our product to a friend or colleague?**

0 1 2 3 4 5 6 7 8 9 10

not likely extremely likely

**What are the primary reasons for the score you gave us?**

Type your answer here...

Question Settings

Image Insert



# Types in personalized welcome message

← Survey Builder Questionnaire ▾ NPS - Store Experience ? Help ⚙

↶ ↷ Insert Activate Preview Save

**Content** Design

BEGIN

- Welcome

SECTION 1

- NPS
- Paragraph

SECTION 2

- Thank You

END

BEGIN

Hello {

- Insert a resource...
- # Account ID Number
- \* Contact Details Text
- # Date Number
- # Order Details Number
- \* Status Text

SECTION 1

How likely is it that you would recommend our product to a friend or colleague?

0 1 2 3 4 5 6 7 8 9 10

not likely extremely likely

What are the primary reasons for the score you gave us?

Type your answer here...

Question Settings

Image Insert



# Inserts data field that resolves to recipient's name

The screenshot shows a survey builder interface with a dark blue header. On the left, there are navigation icons and the text "Survey Builder" and "Questionnaire". On the right, there are "NPS - Store Experience", "Help", and a settings icon. Below the header, there are "Undo", "Redo", and "Insert" buttons. The main content area is divided into three sections: "Content", "Design", and "Question Settings". The "Content" section is active and shows a list of survey elements: "BEGIN", "Welcome", "SECTION 1", "NPS", "Paragraph", "SECTION 2", "Thank You", and "END". The "Design" section shows a preview of the survey. It starts with a "BEGIN" section containing a text box with the message "Hello {Contact.FirstName}!". Below this is a separator with three dots and a trash icon. The "SECTION 1" section contains an NPS question: "How likely is it that you would recommend our product to a friend or colleague?". The response options are a scale from 0 to 10, with "not likely" at 0 and "extremely likely" at 10. Below the NPS question is another question: "What are the primary reasons for the score you gave us?". The "Question Settings" section is currently empty.

Survey Builder | Questionnaire | NPS - Store Experience | Help | Settings

Undo | Redo | Insert | Activate | Preview | Save

**Content** | Design

BEGIN

- Welcome

SECTION 1

- NPS
- Paragraph

SECTION 2

- Thank You

END

BEGIN

Hello {Contact.FirstName}!

...

SECTION 1

How likely is it that you would recommend our product to a friend or colleague?

0 1 2 3 4 5 6 7 8 9 10

not likely | extremely likely

What are the primary reasons for the score you gave us?

Type your answer here...

Question Settings

Image | Insert



# Finishes typing the welcome message!

← Survey Builder Questionnaire ▾ NPS - Store Experience ? Help ⚙️

↶ ↷ Insert Activate Preview Save

**Content** Design

BEGIN

- Welcome

SECTION 1

- NPS
- Paragraph

SECTION 2

- Thank You

END

BEGIN

Hello **{Contact.FirstName}**! Thank you for shopping at Outfitters.

We have a few questions we'd love you to answer. This'll take less than a minute, and it'll help us create a delightful experience for everyone.

⋮

SECTION 1

How likely is it that you would recommend our product to a friend or colleague?

0 1 2 3 4 5 6 7 8 9 10

not likely extremely likely

What are the primary reasons for the score you gave us?

Type your answer here...

**Question Settings**

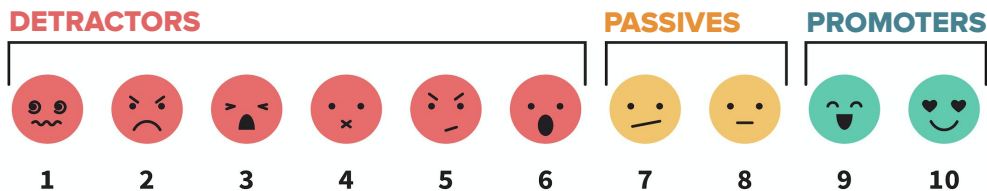
Image Insert





## Angela's Plan

Angela wants to capture the net promoter score.



Then, show a thank you page based on the given score with an appropriate call to action.

**DETRACTORS**  
Promise a call back

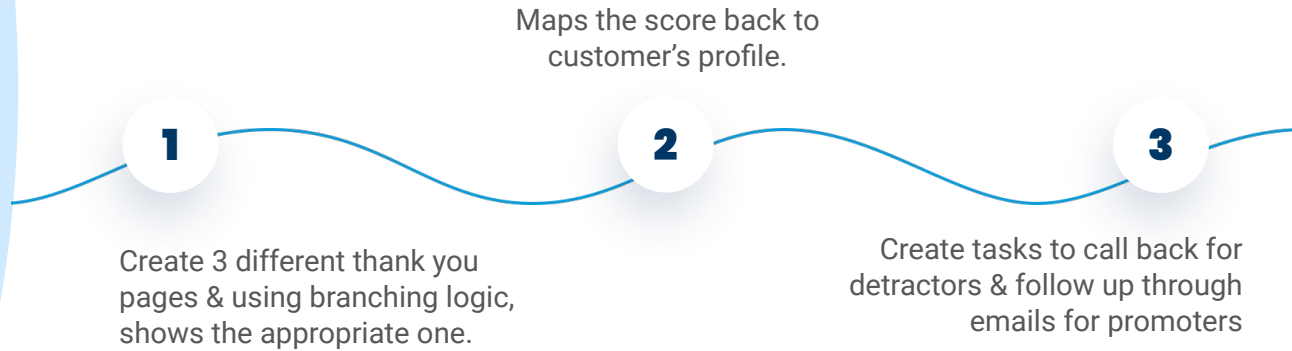
**PASSIVES**  
Share a coupon code

**PROMOTERS**  
Ask to refer a friend



## Angela's Plan

### This is how she gets the job done!



# Deletes the paragraph question & starts to add the thank you sections

← Survey Builder Questionnaire ▾ NPS - Store Experience ? Help ⚙️

↶ ↷ Insert Activate Preview Save

**Content** Design

BEGIN

- Welcome
- SECTION 1
  - NPS
  - Paragraph
- SECTION 2
  - Thank You
- END

BEGIN

Hello **{Contact.FirstName}**! Thank you for shopping at Outfitters.

We have a few questions we'd love you to answer. This'll take less than a minute, and it'll help us create a delightful experience for everyone.

SECTION 1


How likely is it that you would recommend our product to a friend or colleague?

0 1 2 3 4 5 6 7 8 9 10

not likely extremely likely

What are the primary reasons for the score you gave us?

Type your answer here...

⋮ 

**Question Settings**

Image Insert

# Types in content for promoters & clicks on insert

The screenshot shows a survey builder interface with a dark blue header. The header contains a back arrow, a menu icon, 'Survey Builder', 'Questionnaire' with a dropdown arrow, 'NPS - Store Experience', a help icon, 'Help', and a settings icon. Below the header is a toolbar with a refresh icon, a back icon, a forward icon, and an 'Insert' button highlighted with a red box. To the right of the toolbar are 'Activate', 'Preview', and 'Save' buttons. The main content area is divided into three sections: 'Content', 'Design', and 'Question Settings'. The 'Content' section is active and shows a list of sections: 'BEGIN', 'Welcome', 'SECTION 1', 'NPS', 'SECTION 2', 'Thank Promoters', and 'END'. The 'Design' section shows the 'Thank Promoters' section in detail. It contains a 'BEGIN' section with a welcome message: 'Hello (Contact.FirstName)! Thank you for shopping at Outfitters. We have a few questions we'd love you to answer. This'll take less than a minute, and it'll help us create a delightful experience for everyone.' Below this is 'SECTION 1' with a question: 'How likely is it that you would recommend Outfitters to a friend or colleague?' and a 11-point Likert scale from 0 to 10, with 'not likely' on the left and 'extremely likely' on the right. Below that is 'SECTION 2' with a thank you message: 'Thanks for your feedback. It's great to hear that you're a fan of Outfitters. Your feedback helps us discover new opportunities to improve and make sure you have the best possible experience.' At the bottom of the 'Thank Promoters' section are three dots and two icons: a document and a trash can. The 'Question Settings' section is currently empty, showing 'Image' and an 'Insert' link.



# Inserts thank you section

Survey Builder Questionnaire NPS - Store Experience Help

Activate Preview Save

Content Design

BEGIN

Welcome

SECTION 1

NPS

SECTION 2

Thank You

END

BEGIN

Hello **(Contact.FirstName)**! Thank you for shopping at Outfitters.

We have a few questions we'd love you to answer. This'll take less than a minute, and it'll help us create a

**Select & Insert**

Section	Single Choice	NPS	Short Text
Welcome	Yes / No	Rating	Paragraph
Thank you	Multiple Choice	Slider	Date

Cancel Insert

Thanks for your feedback. It's great to hear that you're a fan of Outfitters.

Your feedback helps us discover new opportunities to improve and make sure you have the best possible experience.

Image Insert

Question Settings



# Types in content for passives

Survey Builder Questionnaire

NPS - Store Experience Help

Activate Preview Save

Content Design

BEGIN

- Welcome

SECTION 1

- NPS

SECTION 2

- Thank Promoters
- Thank Passives**

END

SECTION 1

How likely is it that you would recommend Outfitters to a friend or colleague?

0 1 2 3 4 5 6 7 8 9 10

not likely extremely likely

SECTION 2

Thanks for your feedback. It's great to hear that you're a fan of Outfitters.

Your feedback helps us discover new opportunities to improve and make sure you have the best possible experience. [Refer your friends](#) and get 10% off on your next purchase.

Thanks for your feedback. We're glad that you're a customer of Outfitters.

Our goal is to create the best possible product, and your thoughts play a major role in helping us identify opportunities to improve. We would like to give you a coupon. Please redeem [here](#).

...

Question Settings

Image Insert



# Types in content for detractors

← Survey Builder Questionnaire ▾ NPS - Store Experience ? Help ⚙

↶ ↷ Insert Activate Preview Save

**Content** Design

BEGIN

⚡ 1. Welcome

SECTION 1

⚡ 2. NPS

SECTION 2

⚡ 3. Thank Promoters

⚡ 4. Thank Passives

⚡ 5. Thank Detractors

END

**How likely is it that you would recommend Outfitters to a friend or colleague?**

0 1 2 3 4 5 6 7 8 9 10

not likely extremely likely

SECTION 2

**Thanks for your feedback. It's great to hear that you're a fan of Outfitters.**



Your feedback helps us discover new opportunities to improve and make sure you have the best possible experience. [Refer your friends](#) and get 10% off on your next purchase.

**Thanks for your feedback. We're glad that you're a customer of Outfitters.**

Our goal is to create the best possible product, and your thoughts play a major role in helping us identify opportunities to improve. We would like to give you a coupon. Please redeem [here](#).

**Thanks for your feedback. We highly value it.**

Our team might reach out to you to learn more about how we can further improve Outfitters so that it exceeds your expectations.

⋮  

**Question Settings**

Image [Insert](#)



# Angela clicks on define rules to add branching logic

The screenshot shows a survey builder interface for a survey titled "NPS - Store Experience". The interface is divided into three main sections: a left-hand navigation pane, a central design canvas, and a right-hand settings pane.

**Left-hand navigation pane:** This pane is titled "Content" and "Design". It shows a list of survey sections: "BEGIN", "SECTION 1", "SECTION 2", and "END". Under "SECTION 1", item "2. NPS" is highlighted with a blue lightning bolt icon, indicating it is the current section being edited.

**Central design canvas:** This area shows the visual layout of the survey. It is divided into three sections: "BEGIN", "SECTION 1", and "SECTION 2".

- BEGIN:** Contains a welcome message: "Hello **{Contact.FirstName}**! Thank you for shopping at Outfitters. We have a few questions we'd love you to answer. This'll take less than a minute, and it'll help us create a delightful experience for everyone."
- SECTION 1:** Contains a question: "How likely is it that you would recommend Outfitters to a friend or colleague?". Below the question is a Likert scale with 11 options (0-10). The scale is labeled "not likely" on the left and "extremely likely" on the right. The question box is highlighted with a blue border.
- SECTION 2:** Contains a thank-you message: "Thanks for your feedback. It's great to hear that you're a fan of Outfitters. Your feedback helps us discover new opportunities to improve and make sure you have the best possible experience. [Refer your friends](#) and get 10% off on your next purchase."

**Right-hand settings pane:** This pane is titled "Question Settings" and contains several options:

- Required Question:** A toggle switch that is currently turned on (green).
- Description:** A toggle switch that is currently turned off (grey).
- Image:** A link labeled "Insert".
- Branch:** A dropdown menu with "Define Rules" selected. This dropdown is highlighted with a red rectangular box.
- Responses:** A link labeled "Map to Salesforce".

**Top navigation bar:** This bar contains a back arrow, "Survey Builder", "Questionnaire", "NPS - Store Experience", "Help", and a settings gear icon. Below the bar are buttons for "Activate", "Preview", and "Save".



## Opens the modal to setup branching logic for thank you sections

The screenshot shows a survey builder interface with a modal open for defining branching rules. The background interface includes a top navigation bar with 'Survey Builder' and 'Questionnaire' menus, and buttons for 'Activate', 'Preview', and 'Save'. The main content area is divided into 'Content' and 'Design' tabs, with a central text area containing a welcome message and a thank you message. A sidebar on the left lists sections: 'BEGIN', 'SECTION 1', 'SECTION 2', and 'END'. A 'Question Settings' panel on the right has options for 'Required Question', 'Description', and 'Map to Salesforce'. The 'Branch - Define Rules' modal is centered, featuring three dropdown menus for 'When Response Is', 'Value', and 'Go To', an 'Add Rule' button, and 'Cancel' and 'Insert' buttons at the bottom.



Define branching logic

## Defines rules to show the appropriate thank you section

The screenshot displays the Survey Builder interface for a questionnaire titled "NPS - Store Experience". A modal window titled "Branch - Define Rules" is open, allowing the user to define branching logic for different thank you sections based on response values.

The modal window contains three rules:

When Response Is	Value	Go To
Greater than	8	3. Thank you!
In range	Min: 7, Max: 8	4. Thank you!
Less than	7	5. Thank you!

Below the rules is a "+ Add Rule" button. At the bottom of the modal are "Cancel" and "Insert" buttons.

The background interface shows a list of sections: BEGIN, 1. Welcome, SECTION 1, 2. NPS, SECTION 2, 3. Thank Promoters, 4. Thank Passives, 5. Thank Detractors, and END. The main content area displays a thank you message: "Hello {Contact.FirstName}, Thank you for shopping at Outfitters. Thanks for your feedback. It's great to hear that you're a fan of Outfitters. Your feedback helps us discover new opportunities to improve and make sure you have the best possible experience. Refer your friends and get 10% off on your next purchase."

# Branching rules added! Next, map the response back to customer's profile

The screenshot shows a survey builder interface for a survey titled "NPS - Store Experience". The interface is divided into three main sections: a left-hand navigation pane, a central design canvas, and a right-hand settings panel.

**Left-hand navigation pane:** It shows the survey structure with sections and questions. The current question, "2. NPS", is selected and highlighted in blue. The structure is as follows:

- BEGIN
- 1. Welcome
- SECTION 1
- 2. NPS** (Selected)
- SECTION 2
- 3. Thank Promoters
- 4. Thank Passives
- 5. Thank Detractors
- END

**Central design canvas:** This area shows the visual layout of the survey. It is divided into three sections:

- BEGIN:** A white box containing the text: "Hello **(Contact.FirstName)**! Thank you for shopping at Outfitters. We have a few questions we'd love you to answer. This'll take less than a minute, and it'll help us create a delightful experience for everyone."
- SECTION 1:** A white box containing a question: "How likely is it that you would recommend Outfitters to a friend or colleague?". Below the question is a horizontal scale from 0 to 10. The scale is labeled "not likely" at 0 and "extremely likely" at 10. The question box is currently selected with a blue border.
- SECTION 2:** A white box containing the text: "Thanks for your feedback. It's great to hear that you're a fan of Outfitters. Your feedback helps us discover new opportunities to improve and make sure you have the best possible experience. [Refer your friends](#) and get 10% off on your next purchase."

**Right-hand settings panel:** This panel is titled "Question Settings" and contains several options:

- Required Question:
- Description:
- Image: [Insert](#)
- Branch: [Edit Rules](#)
- Responses: [Map to Salesforce](#) (This option is highlighted with a red box in the image)

At the top of the interface, there are navigation buttons: "Activate", "Preview", and "Save". The top bar also includes "Survey Builder", "Questionnaire", "NPS - Store Experience", "Help", and a settings icon.



## Opens modal to map the response back to salesforce tables

The screenshot shows the Survey Builder interface for a questionnaire titled "NPS - Store Experience". The main content area displays a survey question with the text: "Hello (Contact.FirstName)! Thank you for shopping at Outfitters. We have a few questions we'd love you to answer. This'll take less than a minute, and it'll help us create a delightful experience for everyone." A modal window titled "Map Response to Salesforce Tables" is open in the center. The modal contains a "Select a Destination" section with a dropdown menu currently set to "Account" and a search field with a magnifying glass icon. At the bottom of the modal are "Cancel" and "Insert" buttons. The background interface includes a left sidebar with a table of contents (BEGIN, SECTION 1, SECTION 2, END) and a right sidebar with "Question Settings" (Required Question, Description, Image, Attachments, Responses) and a "Map to Salesforce" button.

Survey Builder Questionnaire

NPS - Store Experience ? Help

Activate Preview Save

Content Design

BEGIN

1. Welcome

SECTION 1

2. NPS

SECTION 2

3. Thank Promoters

4. Thank Passives

5. Thank Detractors

END

Map Response to Salesforce Tables

Select a Destination

Account Search field

Cancel Insert

Required Question

Description

Image

Attachments

Responses

Map to Salesforce

SECTION 2

Thanks for your feedback. It's great to hear that you're a fan of Outfitters.

Your feedback helps us discover new opportunities to improve and make sure you have the best possible experience. Refer your friends and get 10% off on your next purchase.

# Selects the destination table

The screenshot shows the Survey Builder interface for a questionnaire titled "NPS - Store Experience". The main content area displays a survey question: "Hello (**Contact.FirstName**)! Thank you for shopping at Outfitters. We have a few questions we'd love you to answer. This'll take less than a minute, and it'll help us create a delightful experience for everyone." A modal dialog titled "Map Response to Salesforce Tables" is open, allowing the user to select a destination table. The modal contains a dropdown menu labeled "Select a Destination" with the following options: Account, Case, Contact, Lead, and Product. A search field is also present. The "Contact" option is currently selected. The modal also features "Cancel" and "Insert" buttons. The background interface includes a left sidebar with a table of contents, a top navigation bar with "Survey Builder" and "Questionnaire" menus, and a right sidebar with "Question Settings" including "Required Question", "Description", and "Map to Salesforce" options.



## Define branching logic

# Selects the field

The screenshot shows the Survey Builder interface for a questionnaire titled "NPS - Store Experience". The main content area displays a survey question with a placeholder for a response field: "Hello (**Contact.FirstName**)! Thank you for shopping at Outfitters. We have a few questions we'd love you to answer. This'll take less than a minute, and it'll help us create a delightful experience for everyone."

A modal dialog box titled "Map Response to Salesforce Tables" is open in the center. It contains a search bar labeled "Select a Destination" with a dropdown menu showing "Contact" and a search input field containing "Rating\_NPS". The dialog also features "Cancel" and "Insert" buttons.

The background interface includes a left sidebar with a table of contents showing sections: BEGIN, SECTION 1 (1. Welcome, 2. NPS), SECTION 2 (3. Thank Promoters, 4. Thank Passives, 5. Thank Detractors), and END. The right sidebar shows "Question Settings" with options for "Required Question" (checked), "Description" (unchecked), and "Map to Salesforce" (checked).

# Response mapped! Next, Angela wants to create a task to call detractors.

The screenshot shows a survey builder interface for a survey titled "NPS - Store Experience". The interface is divided into three main sections: a left-hand navigation pane, a central design canvas, and a right-hand settings panel.

**Navigation Pane (Left):** Shows the survey structure with sections and questions. The current question, "2. NPS", is highlighted in blue. The structure is as follows:

- BEGIN
- 1. Welcome
- SECTION 1
- 2. NPS (Current question)
- SECTION 2
- 3. Thank Promoters
- 4. Thank Passives
- 5. Thank Detractors
- END

**Design Canvas (Center):** Displays the visual layout of the survey. It is divided into three sections:

- BEGIN:** Contains a greeting: "Hello **{Contact.FirstName}**! Thank you for shopping at Outfitters." followed by a paragraph: "We have a few questions we'd love you to answer. This'll take less than a minute, and it'll help us create a delightful experience for everyone."
- SECTION 1:** Contains a Likert scale question: "How likely is it that you would recommend Outfitters to a friend or colleague?". The scale has 11 points from 0 to 10, with "not likely" at 0 and "extremely likely" at 10.
- SECTION 2:** Contains a thank-you message: "Thanks for your feedback. It's great to hear that you're a fan of Outfitters." followed by a paragraph: "Your feedback helps us discover new opportunities to improve and make sure you have the best possible experience. [Refer your friends](#) and get 10% off on your next purchase."

**Question Settings Panel (Right):** Allows configuration of the selected question. The "Tasks" section at the bottom has a "Create" button highlighted with a red box. Other settings include:

- Required Question:
- Description:
- Image: [Insert](#)
- Branch: [Edit Rules](#)
- Responses: [Edit Mapping](#)
- Tasks: [Create](#) (highlighted)



# Opens the modal to setup & assign the task

The screenshot shows a survey builder interface with a 'Create Tasks' modal open. The background interface includes a top navigation bar with 'Survey Builder' and 'Questionnaire' menus, and buttons for 'Activate', 'Preview', and 'Save'. The main content area is titled 'BEGIN' and contains a thank-you message: 'Thanks for shopping at Outfitters! We have a few questions we'd love you to answer. This'll take less than a minute, and it'll help us create an enjoyable experience for everyone.' Below this is a question: 'What are the primary reasons for the score you gave you?' with a text input field. The 'Create Tasks' modal is a white box with a title bar and a close button (X). It contains four dropdown menus: 'When Response Is' (with 'Select an operator' selected), 'Value' (with 'Select a value' selected), 'Task' (with 'Select an action' selected), and 'Assign To' (with 'Select assignee' selected). There is also a trash icon and an '+ Add Rule' button. At the bottom of the modal are 'Cancel' and 'Insert' buttons.



# Chooses the task to call back

The screenshot shows a survey builder interface. At the top, there are navigation options: 'Survey Builder', 'Questionnaire', 'Reopen Survey', 'Help', and a settings icon. Below this is a toolbar with 'Insert', 'Activate', 'Preview', and 'Save' buttons. The main content area is divided into 'Content' and 'Design' tabs. The 'Content' tab is active, showing a list of sections: 'BEGIN', 'SECTION 1', and 'SECTION 2'. The 'BEGIN' section is expanded, showing a text block with the message: 'Thanks for shopping at Outfitters! We have a few questions we'd love you to answer. This'll take less than a minute, and it'll help us create an enjoyable experience for everyone.' Below this is a question: 'What are the primary reasons for the score you gave us?' with a text input field. A 'Create Tasks' modal is open in the center, allowing the user to define a task based on a response condition. The modal has the following fields: 'When Response Is' (set to 'Less than'), 'Value' (set to '7'), 'Task' (with a dropdown menu open showing options: 'Call Back', 'Send Email', 'New Lead', 'Trigger Flow', 'Update Record'), and 'Assign To' (set to 'Select assignee'). There are also 'Cancel' and 'Insert' buttons at the bottom of the modal. The 'Question Settings' panel on the right is partially visible, showing options for 'Required Question', 'Description', and 'Map to Salesforce'.



# Assigns the task to escalation team

The screenshot displays the Survey Builder interface with a 'Create Tasks' modal dialog open. The modal is titled 'Create Tasks' and contains the following configuration:

When Response Is	Value	Task	Assign To
Less than	7	Call Back	Team.Escalation

Below the configuration fields is a '+ Add Rule' button. At the bottom right of the modal are 'Cancel' and 'Insert' buttons.

The background interface shows a survey question: 'Thanks for shopping at Outfitters!' with a response field containing the text 'Type your answer here...'. The interface also includes a 'Content' sidebar with sections like 'BEGIN', 'SECTION 1', and 'SECTION 2', and a 'Question Settings' panel on the right.



# Task created! With that Angela is done with the questionnaire.

← Survey Builder Questionnaire ▾ NPS - Store Experience ? Help ⚙

↶ ↷ Insert Activate Preview Save

**Content** Design

BEGIN

- 1. Welcome

SECTION 1

- 2. NPS

SECTION 2

- 3. Thank Promoters
- 4. Thank Passives
- 5. Thank Detractors

END

BEGIN

Hello **{Contact.FirstName}**! Thank you for shopping at Outfitters.

We have a few questions we'd love you to answer. This'll take less than a minute, and it'll help us create a delightful experience for everyone.

SECTION 1

How likely is it that you would recommend Outfitters to a friend or colleague?

0	1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	---	----

not likely extremely likely

⋮ 📄 🗑

SECTION 2

Thanks for your feedback. It's great to hear that you're a fan of Outfitters.

Your feedback helps us discover new opportunities to improve and make sure you have the best possible experience. [Refer your friends](#) and get 10% off on your next purchase.

**Question Settings**

Required Question

Description

Image Insert

Branch Edit Rules

Responses Edit Mapping

Tasks Edit List



# Now she navigates to 'Distribution Maps' page to setup the triggers

The screenshot shows the Survey Builder interface for a questionnaire titled "NPS - Store Experience". The top navigation bar includes a back arrow, "Survey Builder", a dropdown menu for "Questionnaire", "NPS - Store Experience", "Help", and a settings icon. The main content area is divided into three sections: BEGIN, SECTION 1, and SECTION 2. The BEGIN section contains a welcome message: "Hello (Contact.FirstName)! Thank you for shopping at Outfitters. We have a few questions we'd love you to answer. This'll take less than a minute, and it'll help us create a delightful experience for everyone." SECTION 1 contains a Likert scale question: "How likely is it that you would recommend Outfitters to a friend or colleague?" with a scale from 0 (not likely) to 10 (extremely likely). SECTION 2 contains a thank you message: "Thanks for your feedback. It's great to hear that you're a fan of Outfitters. Your feedback helps us discover new opportunities to improve and make sure you have the best possible experience. Refer your friends and get 10% off on your next purchase." The right sidebar shows "Question Settings" with options for Required Question (checked), Description (unchecked), Image (Insert), Branch (Edit Rules), Responses (Edit Mapping), and Tasks (Edit List). The left sidebar shows the "Content" view with a tree structure: BEGIN (1. Welcome), SECTION 1 (2. NPS), SECTION 2 (3. Thank Promoters, 4. Thank Passives, 5. Thank Detractors), and END.



# Selects the Instore Purchase maps, views the experiences in it & creates a new one

← Survey Builder Distribution Maps ▾ NPS - Store Experience ? Help ⚙

↶ ↷ New Map Activate Preview Save

Search 🔍

- ⚡ VIP Shopper
- ⚡ **Instore Purchase**
- ⚡ Pop-up Store
- ⚡ Repeat Purchase
- ⚡ Product Feedback

### Instore Purchase [New Experience](#)

Store Catalog	
Status	Last Response
Disabled	3 weeks ago

Click & Collect	
Status	Last Response
Enabled	2 days ago

Customer Service	
Status	Last Response
Enabled	3 hours ago

Return Pickup	
Status	Last Response
Enabled	3 days ago

#### Experience Settings

Name: Store Catalog ✎

Status: Active ✎

Survey to Send: Catalog Feedback ✎

#### Survey Trigger

Purchase Fail Reason: Product not available ✎

[Add Trigger](#) [Add Logic](#)



# Enters details for the new experience

Survey Builder | Distribution Maps | NPS - Store Experience | Help | Settings

← ↻ ↺ New Map Activate Preview Save

Search

- VIP Shopper
- Instore Purchase**
- Pop-up Store
- Repeat Purchase
- Product Feedback

### Instore Purchase

New Experience

<b>Store Catalog</b> Status: Disabled Last Response: 3 weeks ago	<b>Click &amp; Collect</b> Status: Enabled Last Response: 2 days ago	<b>Customer Service</b> Status: Enabled Last Response: 3 hours ago
<b>Return Pickup</b> Status: Enabled Last Response: 3 days ago	<b>Untitled</b> Status: Disabled Last Response: --	

### Settings

Name: Untitled

Status: Disabled

Survey to Send: Select

### Survey Trigger

Field: Value

Add Trigger Add Logic

# Selects the survey that will be sent for this experience

Survey Builder | Distribution Maps | NPS - Store Experience | Help | Settings

← ↻ ↺ New Map Activate Preview Save

Search

- VIP Shopper
- Instore Purchase**
- Pop-up Store
- Repeat Purchase
- Product Feedback

### Instore Purchase

New Experience

Store Catalog	
Status	Last Response
Disabled	3 weeks ago

Click & Collect	
Status	Last Response
Enabled	2 days ago

Customer Service	
Status	Last Response
Enabled	3 hours ago

Return Pickup	
Status	Last Response
Enabled	3 days ago

Store Re-Open	
Status	Last Response
Active	--

### Settings

Name: Store Re-Open

Status: Active

**Survey to Send: NPS Store Experience**

### Survey Trigger

Purchase: Instore

Add Trigger Add Logic



# Sets up the triggers for this experience

Survey Builder | Distribution Maps | NPS - Store Experience | Help

Activate | Preview | Save

Search

- VIP Shopper
- Instore Purchase**
- Pop-up Store
- Repeat Purchase
- Product Feedback

### Instore Purchase

New Experience

Store Catalog	Click & Collect	Customer Service
Status: Disabled   Last Response: 3 weeks ago	Status: Enabled   Last Response: 2 days ago	Status: Enabled   Last Response: 3 hours ago

Return Pickup	Store Re-Open
Status: Enabled   Last Response: 3 days ago	Status: Active   Last Response: --

Field: Status | Operator: Equals | Value: Select | Done

### Settings

Name: Store Re-Open | Status: Active | Survey to Send: NPS Store Experience

### Survey Trigger

Purchase Instore | Add Trigger | Add Logic



# Triggers added and the experience is active

Survey Builder | Distribution Maps | NPS - Store Experience | Help

Activate | Preview | Save

Search

- VIP Shopper
- Instore Purchase**
- Pop-up Store
- Repeat Purchase
- Product Feedback

### Instore Purchase

New Experience

Store Catalog	Click & Collect	Customer Service
Status: Disabled Last Response: 3 weeks ago	Status: Enabled Last Response: 2 days ago	Status: Enabled Last Response: 3 hours ago

Return Pickup	Store Re-Open
Status: Enabled Last Response: 3 days ago	Status: Active Last Response: --

#### Settings

Name: Store Re-Open

Status: Active

Survey to Send: NPS Store Experience

#### Survey Trigger

Purchase: Instore

Business Unit: West Coast Stores

[Add Trigger](#) | [Add Logic](#)





## Angela activates the survey

Customers who purchased from the store now receive a timely, personalized survey.

The response is mapped back to their profile with apt follow up tasks.

Maps the score back to customer's profile & create follow up tasks

1

Build personalised questionnaire

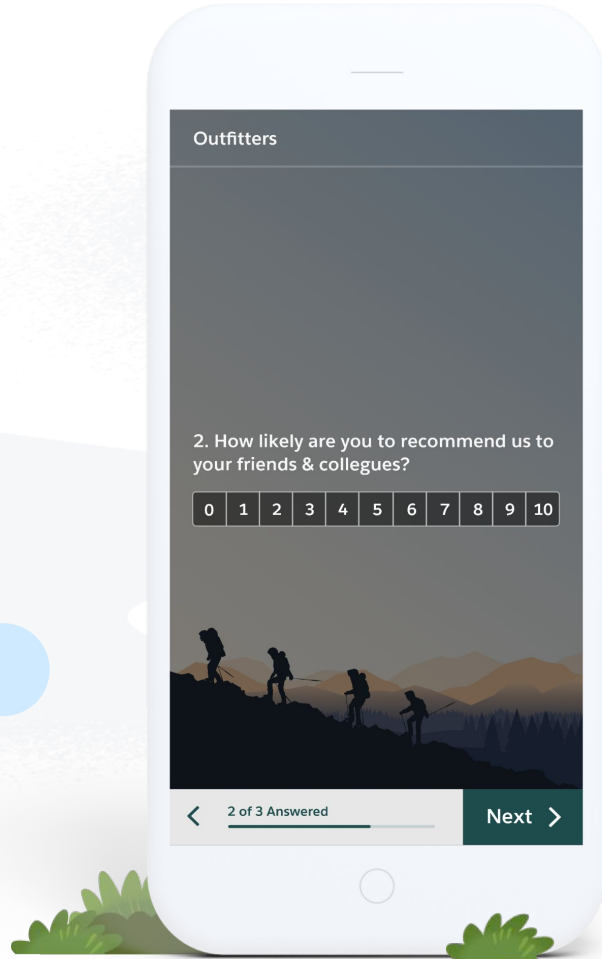
2

3

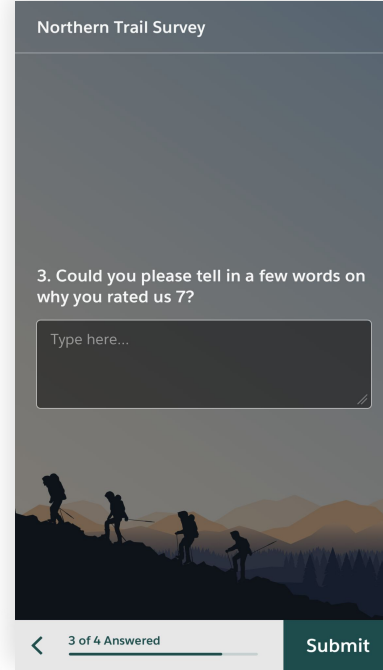
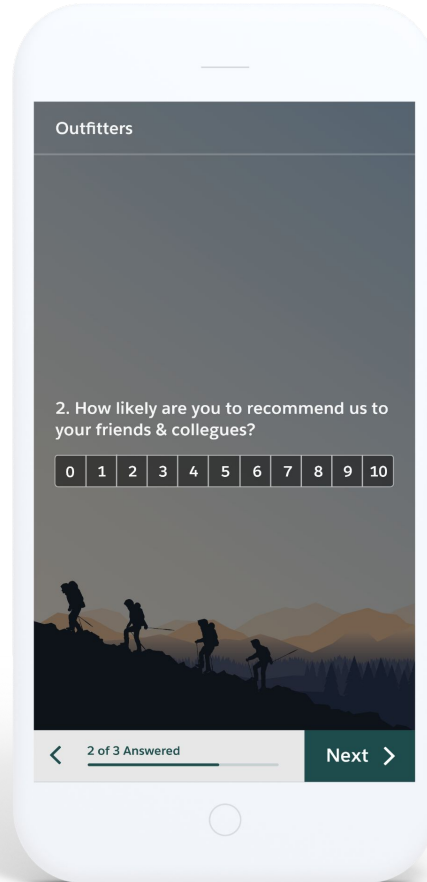
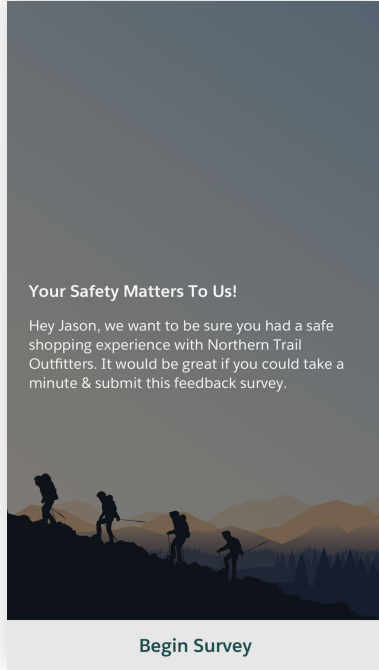
Setup distribution maps & triggers to send survey

The screenshot displays the 'Survey Builder' interface for a distribution map titled 'Instore Purchase'. A green notification banner at the top states: "NPS - Store Experience" is activated. The interface includes a left sidebar with a search bar and a list of categories: VIP Shopper, Instore Purchase (highlighted), Pop-up Store, Repeat Purchase, and Product Feedback. The main content area shows the 'Instore Purchase' configuration with several cards: 'Store Catalog' (Status: Disabled, Last Response: 3 weeks ago), 'Click & Collect' (Status: Enabled, Last Response: 2 days ago), 'Customer Service' (Status: Enabled, Last Response: 3 hours ago), 'Return Pickup' (Status: Enabled, Last Response: 3 days ago), and 'Store Re-Open' (Status: Active, Last Response: --). The 'Store Re-Open' card is highlighted with a blue border. On the right, the 'Settings' panel includes fields for Name (Store Re-Open), Status (Active), Survey to Send (NPS Store Experience), Survey Trigger (Purchase Instore), and Business Unit (West Coast Stores). Buttons for 'Add Trigger' and 'Add Logic' are visible at the bottom of the settings panel. The top navigation bar shows 'Survey Builder', 'Distribution Maps', and 'NPS - Store Experience'.

# Survey Taker's Experience



# Survey Taker's Experience



## Conclusion

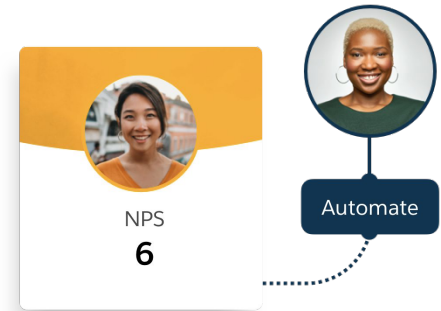
# Angela automated the entire process of capturing contextual feedback and addressing it meaningfully



Angela built and sent a personalised, timely survey



Customer's score is mapped back to her profile



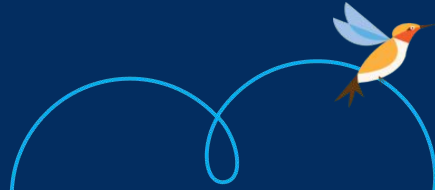
Escalation team is notified to give a call back

Adoption & Usage

# Salesforce Surveys in FY21

Around **1K** Customers & **\$5M** in revenue





# Thank You.

Any questions?