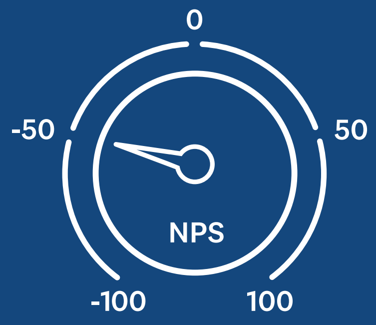
SurveyMonkey and Salesforce: 4 best practices for better customer satisfaction

Why measure customer satisfaction?

Whatever you call it—customer satisfaction, customer happiness, or something else—it's a critical metric for your business to track. This is best done with surveys.

However, organizations often run into problems:

- They're not sure what data to collect
- It's unclear what to do with the data they get
- Their survey process is **disconnected from the business process**



This eGuide shares what we've learned from our most experienced and successful customers using SurveyMonkey's Salesforce integration. Our goal is for everyone to get more value from their post-case surveys by closing the feedback loop.

01 Keep the survey simple and focused

02 Follow up immediately (automate the process)

03 Enrich your survey data with existing data

04 Put the data into context and make it visible

01

Keep the survey simple and focused

When surveys merge the "how happy/satisfied are you" and the "why are you happy/satisfied" questions, the resulting data isn't actionable. Why? Because the "why" questions don't typically give a clear indication of where an organization's problem exists. The "why" questions are important, but they're difficult to do well in most kinds of transactional surveys.

So what's the best way to survey?

Our recommendation is to ask follow the standard NPS® model and ask your core "happiness" question, then follow it with an open text question along the lines of: "What was the most important reason for the score you just gave?"

Two additional questions seem to be helpful in the post-case context. The first is some version of "did we solve your problem?" or "did you get our reply?" Within Salesforce, there is some level of email delivery problems. When you use a tool like SurveyMonkey, the invitation goes out from a different set of mail servers. So there is a chance that the recipient will get the survey, but never saw the case response. Adding a way for the customer to let you know that they never saw a reply can go a long way to improving the customer relationship.

Net Promoter Score and NPS are registered trademarks of Bain & Company, Inc., Fred Reichheld and Satmetrix Systems, Inc.

Ask if you can follow up

Ask for permission for someone to follow up on the survey results. (We'll detail this more in Best Practice 2.) It's important not to ask if you can't or won't follow up. But direct contact is frequently critical if you're going to get to a root cause, and respondents are more likely to respond to your request for follow up if they've given you permission.

Satisfaction with support vs. the product

There's one other question that gets used frequently. Generally, we've seen this as a combination of NPS and a "satisfaction with support" question. The NPS question is seen to be "product-focused" and the satisfaction question focuses on the support interaction. The theory is that you can love the product but have a poor interaction with the support process, or vice versa. This is entirely reasonable, and if it's a concern for your organization, consider adding it in the second question.

Interested in a post-case survey sample?

We have one for you here:
https://www.surveymonkey.com/r/PostCaseExample

> "Seeing customer feedback on their profile helps with finance queries, support, and our sales and account management team. It also helps how we approach our customers and gives a 360 view of each customer."

Zoe Gloyn, Customer Experience Manager
Bookatable by Michelin

02

Follow up immediately (automate the process)

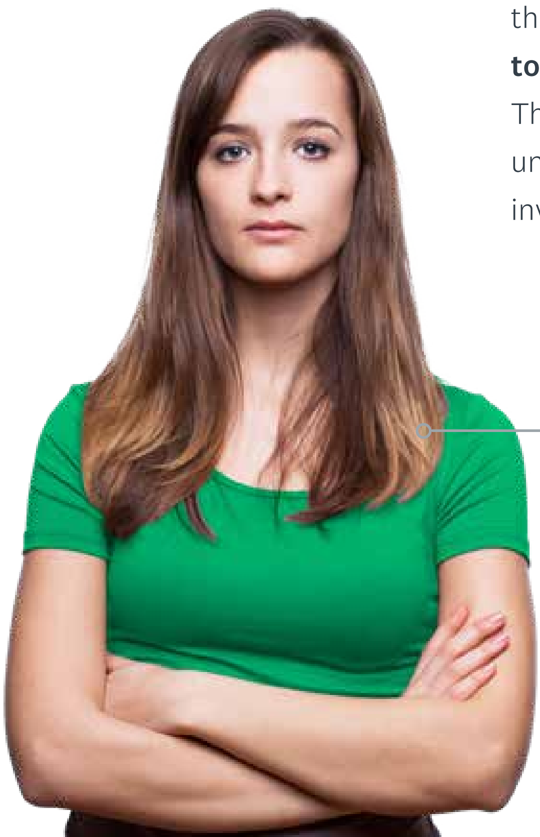
Most customers we have spoken with are doing some kind of follow up on survey results. In our view, this is both the most important opportunity for real learning, as well as a key opportunity for working within a CRM environment like Salesforce.

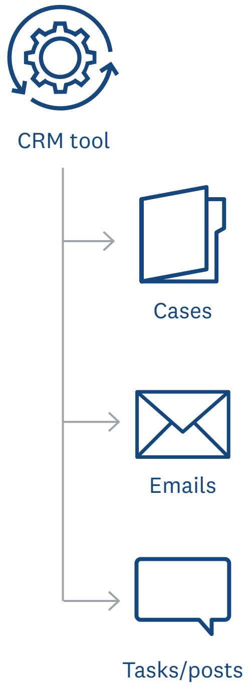
There are 4 key steps to following up. Let's go into them in detail.

Step 1: Start with your unhappy customers

You don't have to follow up with everybody. Bandwidth is almost always a concern, so look at your score distribution and decide what you can handle. Maybe right now, you can only call people who score you 0-6. But make the calls and use that information to improve your program.

While some experts debate the upside of "delighting customers," there's one thing they agree on: there is a **tremendous downside to disappointing or frustrating them**. So dig in and learn from them. Then use those learnings to prevent future customers from becoming unhappy, potentially yielding an outsized return on your team's investment of effort.





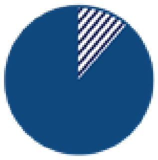
Step 2: Push the notifications

Automatic emails are a huge benefit of working within a CRM tool. When you're in a separate system, somebody has to be reviewing the results and then assigning out whatever actions need to take place. That process is replete with challenges, not the least of which is that it tends to not be seen as very urgent, limiting its effectiveness.

With the data coming back to your CRM tool, it's relatively easy to monitor results and push a notification out when action needs to be action. We've seen this done through cases, emails, tasks, or (in Salesforce) Chatter posts.

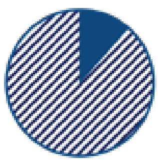
Doing this follow-up is most likely additional work for your team. Make it as easy as possible for them to know what needs to be done. In addition to just providing the notification, provide as much relevant information as you can including contact history, case details, account value, or anything else that's going to make the call easier. Finally (while it may sound obvious), don't forget the contact's name, phone number, and survey responses at the top.

With the data coming back to your CRM tool, it's easy to monitor results and push a notification out when action needs to be taken.



80-90%

of your follow-ups happen at a level close to the souce



10-20%

of your follow-ups should be allocated to a more senior level

Step 3: Follow up close to the source

It matters less who follows up with your customers—it matters more that it actually happens. There are, however, some things you can do to increase the impact of following up.

The most common person for our customers is the "team leader," the line manager who directly oversees the individuals who are responding to cases and being evaluated. That puts the insight closest to the source and makes direct action much more implementable, and likely. We suggest that 80-90% of your follow-ups happen at this level. Some organizations go further and create an "escalation" of more senior, front-line agents who are specifically responsible for following up on the feedback.

The remaining 10-20% should be allocated to more senior members of the organization. Most commonly, this is the Senior Manager, Director, or VP. Doing this provides a rare opportunity for these roles to directly engage with the support process and to hear from customers. Their personal participation can provide a mechanism for broader changes (cross-team or even cross-department) and sends a critical signal of importance to everyone involved in the overall program.

Step 4: Coach for how to follow up

It's important that the follow-up experience is positive for the customer, while also providing you with greater insights in the form of actionable data. When you implement a program like this, you can't just ask the team to "follow up," then complain when nothing actionable comes back. Give your managers a guide for how to complete the call so you can get the outcomes you're looking for. Here's an example.

1. **Write out a specific introduction script** for the call including their name, role, the reason for the call, the expected duration of the call, and the opening question. Individuals can "make it their own"—just have them practice with each other and management so they can deliver it smoothly.

2. **Let the customer get it all out.** There's no sense in taking the time to call and then not taking the time to listen to everything they have to say. Set a cutoff time of 15 minutes of straight listening as a rule of thumb. Don't try to solve as you go; just listen.

3. **Develop a set of issue categories, keywords, and phrases** to listen for in each category. As customers describe their experience, the challenge is to determine whether there's one core issue (plus a bunch of things getting tacked on) or multiple issues in play, so you can focus on the resolution.

4. **You'll likely discover a recurring set of problems** for each category. Identify them. Some of these problems can still be resolved going forward, and you can also develop standard action plans for each.

5. **Leave the call with a plan** for following up with the customer.

03

Enrich your survey data with existing data

Possibly the most important feature of SurveyMonkey's Salesforce integration is that it brings your survey data back into Salesforce. This has the benefit of automatically enriching your survey data with all of the data you already have in Salesforce. Whatever values you track at the Contact, Case, or Account level can be used to slice your survey results. This is incredibly powerful as both an organizational and team management tool.

Many companies aren't taking advantage of this. They're looking at individual results and overall results, but they're not breaking the data down. This is critical since aggregate data and averages can hide the underlying reality.

When you look at the data in this way, you're not just looking for the person, team, region, or product that's falling behind—you're also looking for those that are excelling. For example: by understanding what one representative is doing versus another to drive a statistically different result, you can uncover great positive lessons and opportunities for peer leadership and coaching.

Common dimensions for post-case surveys

There are some general dimensions that make sense in a post-case survey program. They may not all make sense in a given environment, but we suggest trying them out to see what works for you. These can include product line, case origin, issue category, issue complexity, or any support team dimensions you measure.

04 | Put the data into context and make it visible

Survey responses can be a powerful way to understand your customers. Not only do they typically capture overall satisfaction, they frequently include verbatim responses that add significant color. And if you're running a follow-up program and capturing that feedback, there's even more useful information available.

In a B2B setting where your Salesforce organization uses the Account object, one of the easiest things to add to the account page is a Report Chart that shows an account's trended happiness over time. Then when your account executives, account managers, support teams, services teams, or whomever else visit that page, the happiness data is obvious—and it's just a quick click to drill down into the actual contacts and responses.

You can slice NPS data in many different ways—including by month, representative, product, region, and more—to add more context and easily identify areas for improvement.

Summarize key insights

Graphs are great, but since you're already looking at this data, have your team summarize it in a way that makes it easy for others to consume. Our two best suggestions are to either use Chatter, or to create a custom field on the Account object that your team can highlight. Put that field next to the satisfaction chart and you have a clean insights section.

Make it easy to ask questions

When an account executive digs into the data, there will likely be a question. And if it's not easy and fast to ask, you've likely lost the opportunity to engage. We suggest turning Chatter on for the Survey Invitation object and making that the primary place to engage around a survey result. Create a public Chatter group called "Survey Questions" (or something similar) and have anyone with a question @mention that group in their post. In addition to waiting for someone to discover the result, the team can @mention specific users to call attention to a response.

\+

Salesforce®

"Since we installed the SurveyMonkey for Salesforce® integration, we have immediately seen tangible impact in our survey process. Set up was a breeze, and tying survey results to specific cases has improved our ability to deliver Uncommonly Great service to our customers."

Joel Strickland
Director of Client Relations, New Management Services

Conclusion

Measuring and improving customer satisfaction isn't easy. Customers have higher expectations than ever when it comes to their experience. It needs to be fast and seamless, and customer success teams are often on the front lines.

Giving them the right tools to make your customers happy is paramount. Integrating SurveyMonkey and Salesforce helps your team meet challenges head-on with speed and precision.

Learn more

Talk to our team

SurveyMonkey®