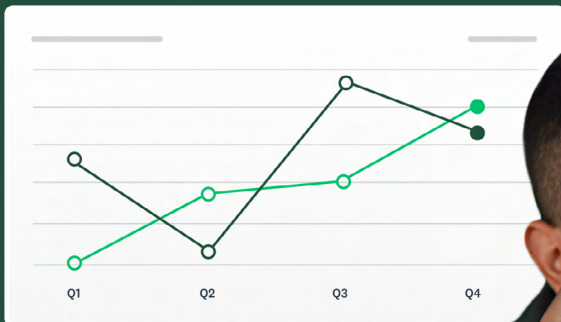


GUIDE

# Unlocking ROI with Salesforce and SurveyMonkey

Add feedback data to Salesforce to transform your business



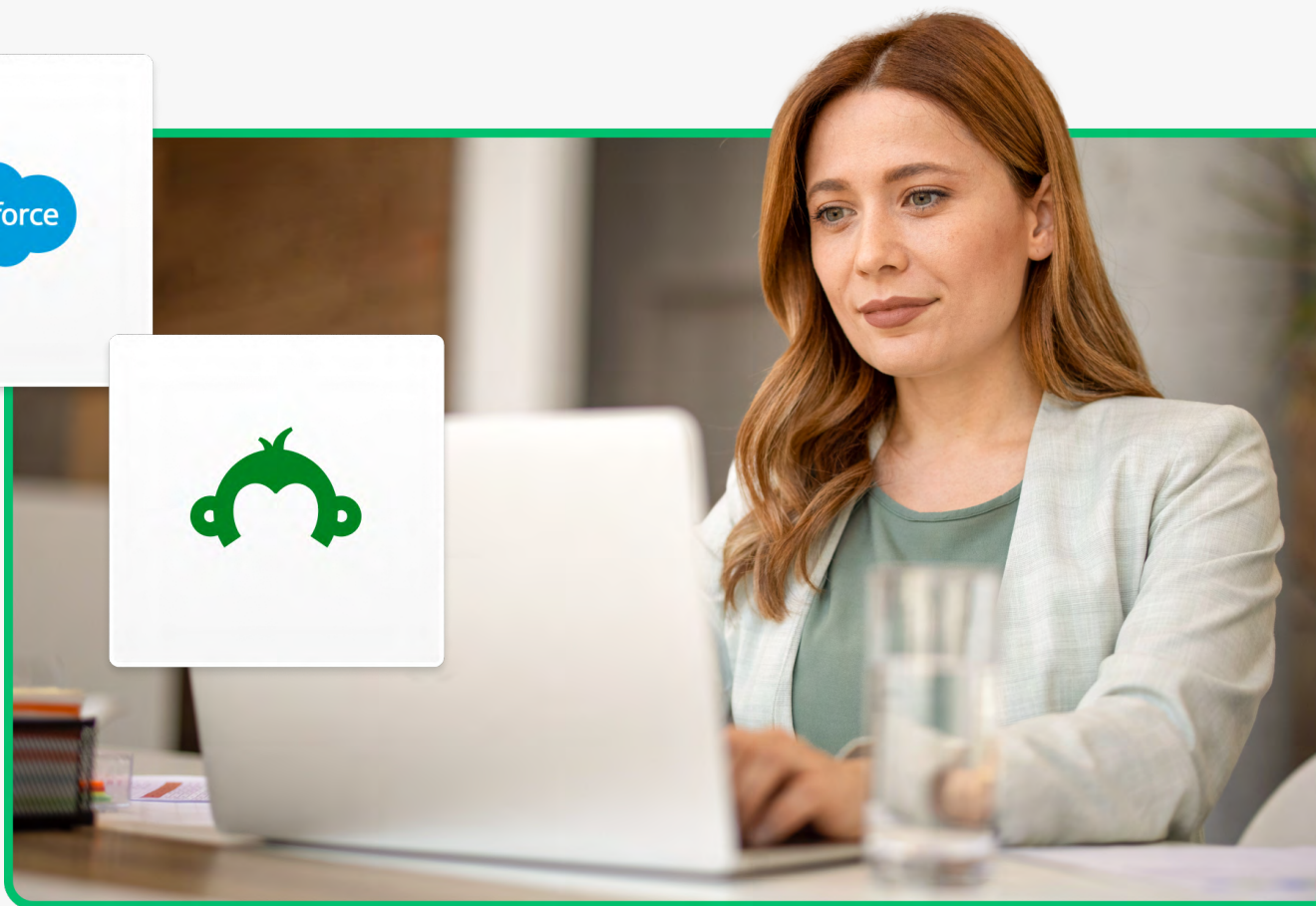
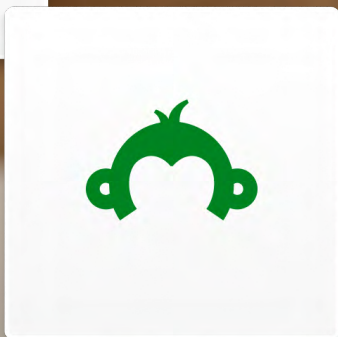
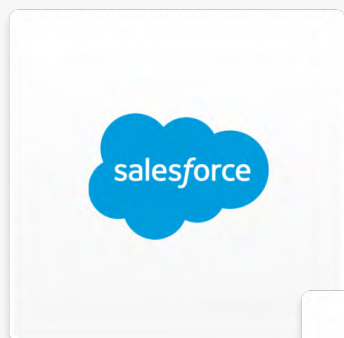
## Overview: What you'll get from this guide

Companies today face fierce competition when it comes to gaining customers, preventing churn, and sustaining loyalty. And with higher expectations for a seamless customer experience (CX), companies must demonstrate that they care about their relationship to customers by putting them at the center of every business decision.

Today, more businesses are transforming the way they operate by using feedback to pinpoint where to focus and then continuously listening to customers to make sure their strategies are hitting the mark. To that end, integrating SurveyMonkey with Salesforce is a powerful way to gain a 360-degree view of the customer, unlocking the full potential of customer data.

In this guide, we'll outline the three top ways that you can leverage this integration, with recommendations on how to further utilize its features if you've already begun using Salesforce with SurveyMonkey. We'll walk you through important considerations for each stage of the integration process, empowering you to use analysis tools with care and confidence.

Read on to better understand the power duo of Salesforce and SurveyMonkey.



**ONE**

**3 key ways**

**to use**

**Salesforce and**

**SurveyMonkey**

The SurveyMonkey and Salesforce integration helps you gain a comprehensive view of your customer by connecting operational data to customer feedback. It does this by enriching operational, **structured data** (quantifiable, transaction-based metrics) with the **unstructured data** of customer feedback (context-rich, qualitative responses).

Whether you want to understand customer renewal rates by looking at support call feedback, or improve marketing campaigns by segmenting by Net Promoter Score® data, you'll gain a holistic view of the customer that can move your organization from insights to action faster.

Here are three common ways that our customers have leveraged this integration:

## 1 Taking in-the-moment action to prevent churn

Integrating SurveyMonkey and Salesforce allows you to trigger feedback surveys directly from Salesforce based on key customer interactions or behaviors that may signal churn risk. For example, you can automatically send a survey after a support case is closed to gauge satisfaction. If the response indicates dissatisfaction, it can create a follow-up task in Salesforce for an account manager to address the issue promptly before the customer churns. This helps you take proactive steps to retain at-risk customers.

The image shows a man in a red beanie and a woman looking at a laptop. Two screenshots are overlaid:

- SurveyMonkey Screenshot:** Shows a survey question: "Q1 How likely is it that you would recommend this company to a friend or colleague?" with a response of "Extremely likely - 10". A second question "Q2 Rate your satisfaction with our team." has a response of "5".
- Salesforce Screenshot:** Shows a contact record for "Mr. Milton Enterprises". It lists "OPPORTUNITIES (2)", "CASES (6+)", and "SURVEYMONKEY SURVEY RESPONSES (8)". A specific case is detailed with ID "0000109", subject "Software Installation Support", priority "Medium", and date "07/05/2023, 9:42".



## 2 Setting up transactional and relational NPS programs

Establish automated workflows to send transactional Net Promoter Score® (NPS) surveys after key interactions like support cases or product purchases. Relational NPS surveys that focus on overall customer loyalty over time can also be triggered based on set time periods. Survey responses are then fed back into Salesforce records for a complete view of customer health and easy trend tracking over time. This data enables you to identify promoters, passives, and detractors, and take action accordingly.

For example, you might have the goal of turning more passives into promoters. You could ask targeted follow-up questions to your passive responders to understand priority areas for improvement, and then send results to support and product team members to take the actions needed to convert those customers to promoters.

### Transactional NPS (tNPS)

**Purpose:** Immediate, rapid feedback for operational excellence. Narrow in scope, uses team-level KPIs such as response rate or star ratings for representatives.

**Recommended use:** tNPS is highly effective after specific customer interactions like support calls, product purchases, or service engagements. tNPS surveys help businesses understand and improve the customer experience in real time.

### Relational NPS (rNPS)

**Purpose:** Ongoing, strategic feedback for relationship building. Broad in scope, uses organizational KPIs such as customer churn and renewal rates.

**Recommended use:** rNPS should be used to measure overall customer loyalty, enhance long-term relationships, and track trends over time. rNPS surveys are useful as customer relationships evolve, such as in subscription models or long-term service agreements.



1. How likely are you to recommend this product to a friend?

NOT AT ALL LIKELY

EXTREMELY LIKELY

0	1	2	3	4	5	6	7	8	9	10
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### 3 Creating data-driven sales and marketing campaigns

Combine survey data with existing Salesforce data to create hyper-targeted sales and marketing campaigns tailored to specific customer profiles and behaviors. For instance, you can segment promoters (high NPS) for an upsell campaign, or target passive/detractor groups with a win-back promotion. Having rich feedback data synced with operational data in Salesforce allows you to be nimble in adjusting strategies.

“ Being able to integrate SurveyMonkey with our sales and marketing tech stack has been really helpful in getting full-circle data that is available beyond just marketing ops for the CS, sales, and broader marketing orgs. For example, NPS, CSAT scores, and other business-specific measures we poll from our customers and prospects are integrated directly and made available at the contact and lead object level so that data is not siloed or stuck in dashboards outside of Salesforce. This is an important tool for data visibility!

**Julia Brocato**  
Senior Marketing Programs Manager  
HG Insights



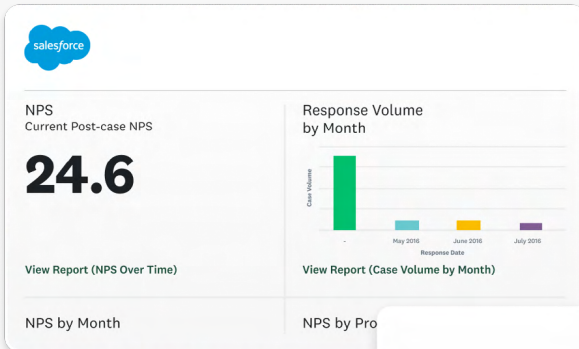


**TWO**

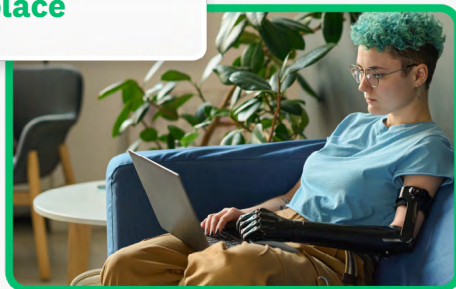
**Top benefits  
to using the  
integration**

Combining the power of Salesforce’s customer data with SurveyMonkey’s feedback capabilities unlocks numerous benefits to drive business growth and operational efficiency. Here are just a few:

- **Create a single source of truth for your business:** Create one centralized place for a comprehensive, 360-degree view of the customer. Every interaction and data point is aggregated in a unified record, ensuring alignment across teams and functions for consistent, personalized engagement.
- **Demonstrate how CX ties to retention:** With survey feedback linked to customer attributes and behaviors in Salesforce, you can clearly show how excellent customer experience impacts business metrics like customer lifetime value (CLV) and churn. Proving this ROI elevates the importance of CX efforts and ensures initiatives get enough focus.
- **Personalize at scale to increase responses:** The integration allows you to easily trigger surveys based on specific customer activities or milestones captured in Salesforce. This context drives higher response rates by making outreach feel timely and relevant. Automation also enables feedback collection at scale.
- **Free up time for your team with automated flows and always-on analytics:** By automating survey deployment and the flow of data between systems, your team is freed from manual processes. In addition, these data pipelines enable real-time reporting and analytics so customer intelligence is always up-to-date if your analytics resources are limited.



**Centralize customer data  
in one place**







“SurveyMonkey gets Salesforce. That’s huge for us,” said Matt Schoolfield, senior manager of commercial analytics at Greyhound. Greyhound uses the Salesforce integration with SurveyMonkey to send post-trip survey emails that are triggered inside of a Salesforce journey, so they’re personalized and automatically sent 24 hours after a trip is completed.

The email link brings in about 85% of the survey’s responses. Schoolfield said he has plans to further streamline the experience by eliminating origin and destination questions and connecting that information by confirmation number in Salesforce.

“Within a few months of using SurveyMonkey, our NPS was up almost 15 points. It changed the way that data was getting into people’s hands and it changed what they were able to do with it,” Schoolfield said.

Read the complete Greyhound customer story.

Read here



Greyhound boosted its NPS by nearly

**15 pts**

**THREE**

**4 steps to  
integrate  
SurveyMonkey  
with Salesforce**

Connecting your CRM workflows with survey data is straightforward, but it's important to carefully plan and configure the integration to meet your specific goals. The following four steps will guide you through setup:

## How it works: Start making a positive business impact

1

**Choose your survey distribution method**

2

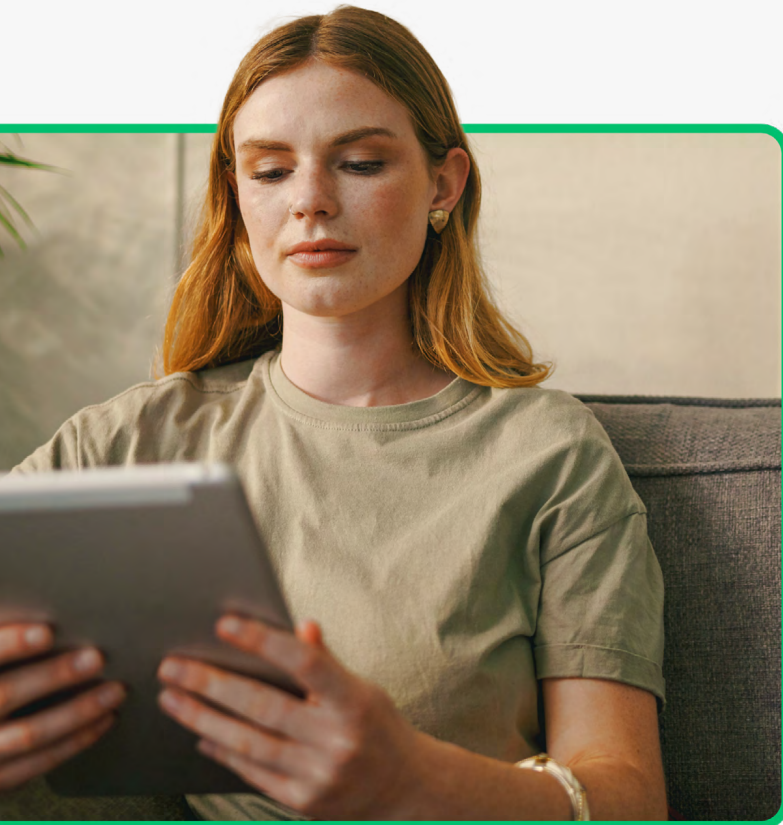
**Decide how you'll store data in Salesforce**

3

**Analyze and share the data**

4

**Act on customer feedback with automations**



### **Step 1: Choose your survey distribution method**

Consider how you want to distribute the surveys that will map to Salesforce (by map, we mean connect your source data from SurveyMonkey to your target data in Salesforce) to ensure that you're collecting the most relevant, valuable feedback data.

Keep in mind that, through this integration, you'll have access to tools such as custom field mappings, automation to trigger workflows from survey responses, as well as reporting and dashboard features to analyze the combined data, and more.

By carefully considering the feedback type, lead gen needs, and personalization opportunities, you can focus your survey distribution strategy to improve the quality of integrated data flowing into Salesforce. Start by asking the following questions:

### 1 Do you want to collect relational or transactional feedback?

SurveyMonkey can help you measure how you're doing around anniversary and renewal dates (relational), or after a customer interacts with your team (transactional).

### 2 Are you generating quality leads?

Automate lead generation and more with forms that use powerful conditional rules like [skip logic](#) and response routing to tailor follow-up questions to qualify and segment leads more accurately.

### 3 Need to customize a survey based on existing Salesforce data?

Our integration lets you personalize the survey and even choose survey paths based on information you have stored in Salesforce.

### 4 How do you want to automate sending feedback to Salesforce?

There are a few ways to automate the process of connecting survey feedback to your CRM. The two most common ways to receive results are through a web link or email collector. See details below:

#### **Web link collector**

A custom survey URL that you can paste into a Salesforce distributed email. You can use [custom variables](#) in your link.

- Great for transactional or relational survey emails from Salesforce or any other marketing/email platform
- Best response rate if you're already communicating with customers over Salesforce emails

#### **Email collector**

Sends an email with an embedded survey invitation from SurveyMonkey. Simply create a flow and Outbound Message in Salesforce to use an Email Invitation.

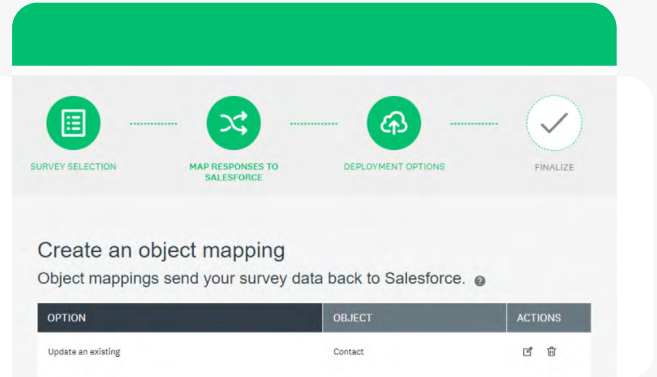
- Great for transactional or relational survey emails via SurveyMonkey
- Allows you to use SurveyMonkey email templates with embedded questions, survey previews, and clear CTAs

## Step 2: Decide how you'll store data in Salesforce

When it comes to mapping customer feedback to Salesforce, there are two typical paths that users take with SurveyMonkey, but you can choose options from each. [Managed mappings](#) are a pre-built package that can be installed. This accommodates any mappings you create, including common [look-up fields](#) such as Case, Contact, Leads, and Accounts. You also have the option to add more to trigger surveys from other **standard objects** (i.e. accounts, cases, contacts, and opportunities that are included with Salesforce by default) or **custom objects** (based on standard objects but unique to your organization).

If you prefer a more custom approach to mapping responses from SurveyMonkey, you can build your own custom object/mapping within Salesforce. For example, you could set up your mappings so that the answers to certain questions, such as CSAT ratings, map to a custom field called “Customer Satisfaction” in the Account object.

### Choose which Salesforce object you want to create or update



Many users start with managed mappings because it doesn't require maintenance, then add custom objects/mappings that will automatically update existing records. Here are the benefits to each approach:

#### 1 Managed mappings

- Pre-built for ease of use
- Creates objects in a [parent-child hierarchy](#), for an easy and intuitive navigation experience (learn more about [SurveyMonkey Managed Packages](#) here)
- Syncs each question response to its own record
- Includes common look up fields: Case, Contact, Leads, and Accounts

#### 2 Custom objects

- DIY, include only the fields you need
- Sync all survey responses to one record
- Map to any standard objects such as Case or Contact record fields
- Use record types and any look up fields to relate survey response records to existing Accounts, Contacts, Cases, etc.



### Step 3: Analyze and share the data

It's not enough to collect the data—the real value comes from taking action. Once you've connected your customer feedback to sales and revenue, you can start making that data visible to cross-functional teams. Here are three ways to leverage this unified data:

- 1 Influence sales and marketing strategies:** Create reports and dashboards to show correlations between survey metrics and revenue metrics. For example:
  - **Average deal size:** Analyze survey responses about product features, pricing perceptions, and customer pain points alongside average deal sizes. This can reveal factors that influence customers' willingness to pay, allowing you to tailor offerings and negotiate more effectively.
  - **Win rate:** Correlate satisfaction scores with actual win rates across different segments, sales reps, and products. This sheds light on the strengths and weaknesses that impact your ability to close deals.
  - **Customer lifetime value (LTV):** Connect customer health scores, relational NPS, and open-ended feedback with historical LTV data. This can show you what is driving loyalty and repurchasing behavior to maximize customer retention.
  - **Customer acquisition costs (CAC):** Map lead quality ratings, interest levels from surveys to prospects, and marketing campaign feedback against your CAC metrics. This helps optimize marketing spend and lead nurturing based on what resonates with your ideal audience profiles.



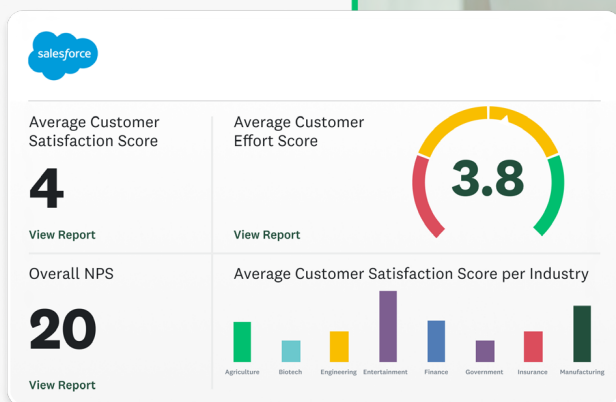
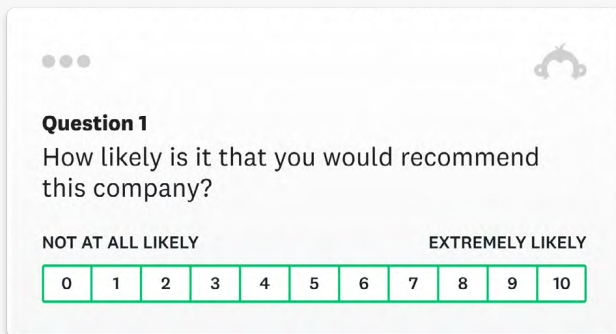
## 2 Create regular results readouts:

- Compile survey results into an internal report that highlights overarching themes, trends, and key insights to make strong, data-driven recommendations
- Segment the data by customer attributes (demographic, geographic, behavioral, etc.) to better understand the experience within different customer cohorts or personas

## 3 Share your wins:

- Highlight customer success stories and wins enabled by acting on feedback
- Identify satisfied customer champions who can provide testimonials or case studies
- Uncover expansion opportunities with existing customers based on their needs surfaced in the feedback

By analyzing the integrated feedback data in Salesforce and sharing it across the organization, you can drive improvements through every facet of the customer experience from marketing, sales, product development, and retention.



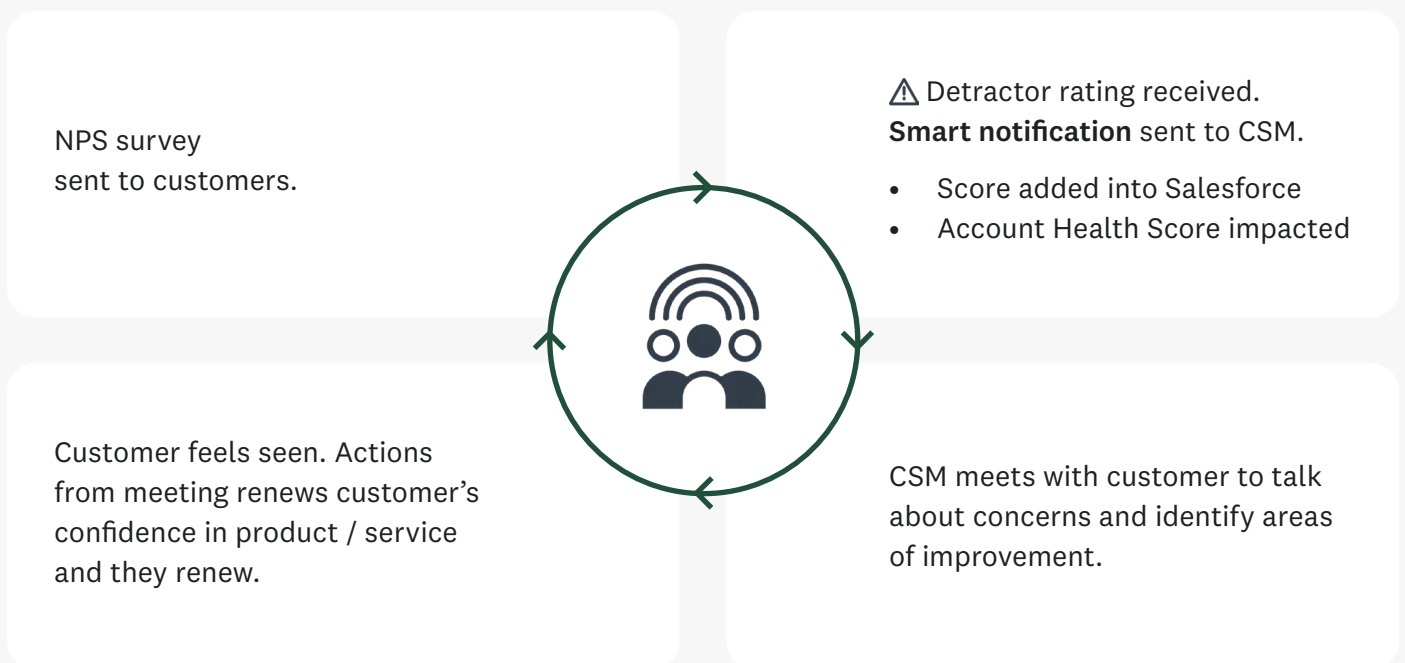
## Step 4: Act on customer feedback with automations

There are many ways to automate workflows in SurveyMonkey and Salesforce, and drive action from the real-time feedback you collect. By setting up triggers and rules based on survey responses, you can ensure that valuable customer feedback doesn't get lost or go unaddressed. Instead, you can initiate follow-ups quickly, resolve issues, and capitalize on opportunities—all without manual effort.

Here are just a few powerful automations:

- **Response-based triggers:** Automatically trigger follow-up actions based on responses received (e.g. account review invites, thank-you email, and other relevant content to drive adoption).
- **Prompt intervention:** Flag negative feedback and automatically create cases for customer support teams to address issues promptly.
- **Flag at-risk customers:** Use NPS, CSAT, or CES metrics to develop a high-risk customer score and build a Customer Save Program (CSP) or predictive churn modeling.
- **Connect with your champions:** Automatically flag Promoters/Advocates and highly satisfied customers and trigger invites to your Customer Advocacy Board (CAB) or a call-to-action to leave a review.

Below is an example of a NPS survey-based feedback loop using both platforms, beginning at the point of sending the surveys, and ending with action being taken and the customer feeling seen:



**FOUR**

**Conclusion**



Customer feedback is a goldmine, providing everything you need to drive improvements and maintain customer loyalty over time. And when it comes leveraging feedback data, the powerful duo of Salesforce and SurveyMonkey offers a solution that’s not only actionable and scalable, but also demonstrates care to listen to customers in real-time. It’s only when you dare to ask questions that uncover CX gaps and opportunities that you can do better.



### Actionable

Enrich Salesforce data with feedback to **add context** and **drive** better **decisions**.



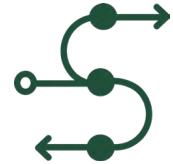
### Scalable

**Automate** workflows to **reach more of your customers**, while freeing up time for your team.



### Real-time

**Spot trends or trouble** by monitoring CSAT, NPS, and more. Timely insights allow you to **act before customers churn**.



### Flexible

Connect Salesforce with an intuitive feedback platform that **flexes for use cases beyond CX**.

One SurveyMonkey customer recently used the integration to create an “always on” support survey. By analyzing the feedback data within the Salesforce environment, the company identified areas for improvement, such as the need for more empathetic customer support interactions. Acting on these insights, the company rolled out a comprehensive training program to improve the team’s talk track, ultimately improving the caller experience.

This is just one example of what can happen when customer data becomes actionable—it enables data-driven decision-making and tangible results.

By leveraging Salesforce and SurveyMonkey, you can unlock the full potential of customer feedback, driving continuous improvement, enhancing customer loyalty, and ultimately, fostering long-term business transformation.

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**Learn how SurveyMonkey and Salesforce can advance your goals and transform your business.**

[Get started](#)