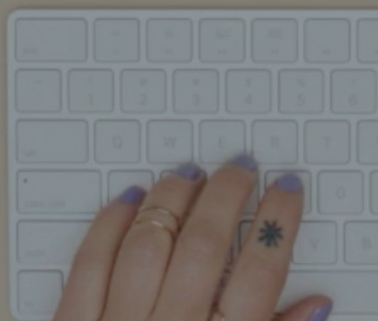# 10-STEP GUIDE TO LAUNCHING A STRATEGIC CUSTOMER FEEDBACK PROGRAM

STEP 1:
DEFINE YOUR GOALS

IDENTIFY THE PROBLEMS YOU HOPE TO SOLVE

The most effective customer feedback programs start with a list of challenges and unknowns. Maybe churn is on the rise and you don't know why, or customers aren't engaging with a new product. Customer feedback helps identify the "why" so you can make more informed decisions.

Here's a table you can use to get started. Just fill in your problem/challenge (e.g. *Customer churn rate is rising*), jot down the unknowns, and assign it a priority level.

PROBLEM/CHALLENGE	UNKNOWN(S)	PRIORITY
Customer churn rate is rising	*Gaps in customer onboarding process* *Product/service issues*	(high) med / low
		high / med / low
		high / med / low
		high / med / low
		high / med / low
		high / med / low

STEP 2:
MAP OUT YOUR STRATEGY

Once you have your goals in place, you can start focusing on the specifics. First things first: when and how you'll survey your customers. It helps to think in terms of customer touchpoints, or interactions with your people, products, and processes.

IDENTIFY KEY CUSTOMER TOUCHPOINTS

Which interactions have the greatest impact on customer happiness? You don't have to know the answer, but it's important to come back to that question whenever you're thinking about how and when you survey customers.

Here's a table you can use to get started. Just fill in your customer touchpoint (e.g. *Customer starts a trial*) and jot down the sources of friction/unknowns. Cross-reference this list with your goals from Step 1 to figure out how they align.

CUSTOMER TOUCHPOINT	SOURCES OF FRICTION/UNKNOWNS
Customer starts a trial	*Sign-up process is confusing.* *Does welcome email/onboarding flow need updates?*

TIE EACH TOUCHPOINT TO A KEY METRIC

Remember, standardizing your measurement is the best way to get consistent historical data and spot trends. That's why it's important to include a quantitative question in every survey you send. Once you have a solid list of touchpoints and sources of friction/unknowns, you can begin assigning metrics to each touchpoint.

Here's a table you can use to assign your metrics. Go back to your last table and circle any sources of friction/unknowns that you want to survey your customers about. Plug those into the left column below, then write a corresponding question and metric beside each one.

SOURCE OF FRICTION/ UNKNOWN	POSSIBLE QUESTION(S)	METRIC(S)
Sign-up process is confusing	How was your initial experience? Do you have any feature questions?	Customer Satisfaction
Support quality by agent / region / product	How knowledgeable was your agent? Was it easy to get support today?	Agent Performance, Customer Effort

SETTLE ON YOUR TIMING

You can collect feedback in two ways: immediately after an interaction (transactional surveys) or periodically/on a set schedule (pulse surveys).

- ⊘ Transactional surveys help you measure specific interactions—a customer engages with your company, and you collect feedback about that experience.

- ⊘ Pulse surveys help you "take the temperature" of customers to get an overall picture of health and happiness (e.g. an annual Voice of the Customer survey).

You certainly don't need to map out every single customer survey you'll ever send, but it helps to start thinking about your feedback program comprehensively like this so you can plan ahead. Plus, setting a general survey schedule can help you avoid over-surveying your customers, which is a legitimate concern as your feedback program grows.

DECIDE HOW YOU'LL USE THE FEEDBACK YOU COLLECT

Before you send a single survey out, sit down and map out some basic strategies for addressing and acting on customer feedback. This exercise gets you thinking through the people and resources you'll need to be successful, so you can enlist help early on.

Here are some questions to get you started:

⊘ How will you act on...

positive ratings?   _____

neutral ratings?   _____

negative ratings?   _____

⊘ Who will follow up with...

happy customers (promoters)?   _____

neutral customers (passives)?   _____

unhappy customers (detractors)?   _____

⊘ Will you accept feature requests? If so, what will you do with them?

⊘ What other teams/departments will be involved in analysis and action?

⊘ How will your CX metrics tie back to the key problems/challenges you want to solve?
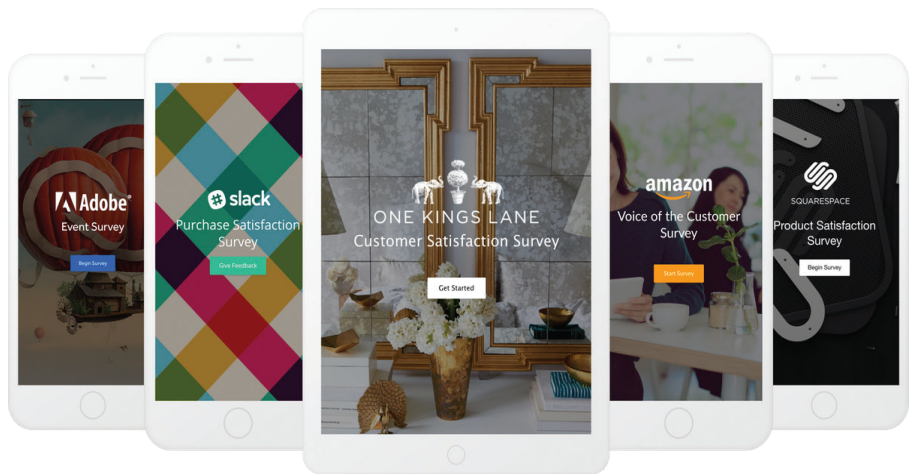
STEP 3:
CHOOSE YOUR SURVEY TOOL

Now that you've defined your goals and mapped out your strategy, it's time to think about the tool that will help you execute on them. There are plenty of online survey tools on the market, and the one you select will depend on your needs and budget.

CLARIFY YOUR WANTS AND NEEDS

You should expect a lot of variation between one survey tool and the next when it comes to features, integrations, and general capabilities. If you're overwhelmed by the options, it can help to focus on your need-to-haves versus your nice-to-haves.

Here are some questions to ask yourself:

- How do you want to distribute your surveys? Via email? live chat? on the website? over social media?

- Do you want your surveys to be optimized for mobile? (The answer should be yes!)

- How much control do you want over survey design?

- What are your must-have features and integrations?

- How many people will be using the tool? Multiple team members may be involved at different stages: implementation, survey creation, survey distribution, survey analysis, etc.

- What is your maximum yearly budget?

COMPARE SURVEY TOOLS

Now that you've outlined your needs, you can run through the list of tools and check the boxes. Software review sites like the Salesforce AppExchange, G2 Crowd, and Capterra compare tools based on features, pricing, and user reviews. Of course, you should also sign up for a free trial of any survey tool you're evaluating.

To start a free trial of GetFeedback,
visit getfeedback.com/join

Here's a checklist you can use to start comparing tools. We took the liberty of filling in some boxes.

NEED/WANT	getfeedback	TOOL #2	TOOL #3
Highly customizable survey design	✔		
Easy-to-use survey builder	✔		
Mobile-friendly, on-brand surveys	✔		
Integrates with email provider	✔		
Integrates with Salesforce	✔		

MAKE YOUR DECISION

After you've narrowed down your options and gone through the trial process for each tool you're considering, it's time to make your decision. This will obviously hinge on budget and buy-in from decision-makers. If you're struggling to get budget, try focusing on the potential ROI of a great feedback program.

To read about the ROI other companies have seen,
visit getfeedback.com/customers

STEP 4:
GET STARTED

You've purchased your survey tool and you're ready to go. You may want to jump straight into survey creation, but make sure to spend time properly implementing your new software. That may mean involving other team members, like your Salesforce Admin, email marketer, front-end engineers, and more.

SELECT YOUR SURVEY QUESTION TYPES

Return to the table you filled out with questions and metrics. Now that you've brainstormed what your questions will look like, you can start adding them to your survey. In general, we recommend creating a unique survey for each touchpoint, but you can always duplicate your survey and reuse it.

> **Multiple Choice Question:** Customer selects one answer from a set.

> **Rating Question:** Customer selects a rating from a scale of options.Short

> **Answer Question:** Customer writes a brief, open-ended answer.

> **Picture Choice Question:** Customer selects a photo from given options.

> **Rank Question:** Customer ranks answers in order of importance.

> **Form Question:** Customer completes given fields.

> **Slider Question:** Customer selects a rating from a spectrum.

> **Grid Question:** Customer answers a set of similar multiple choice or rating questions.

> **Net Promoter Score (NPS) Question:** Customer says how likely they are to recommend your business.

> **Image Upload Question:** Customer uploads an image.

FOLLOW SURVEY BEST PRACTICES

There are a number of things you can do to maximize your survey response rates and get high-quality feedback. It's not just about the questions you ask, but the way you ask them.
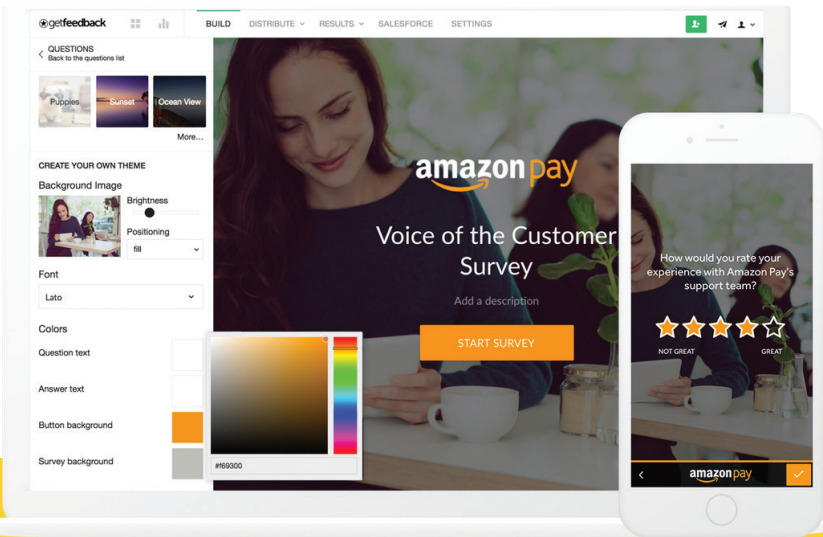
SURVEY DESIGN

- ⊘ Background image is engaging
- ⊘ Text is easy to read
- ⊘ Survey renders well on mobile devices
- ⊘ The design is on brand

SURVEY CONTENT

- ⊘ 5 questions or less
- ⊘ Each question has a clear purpose
- ⊘ Includes at least 1 quantitative question
- ⊘ Language is short and concise
- ⊘ Answers are well balanced
- ⊘ Does not include biased language
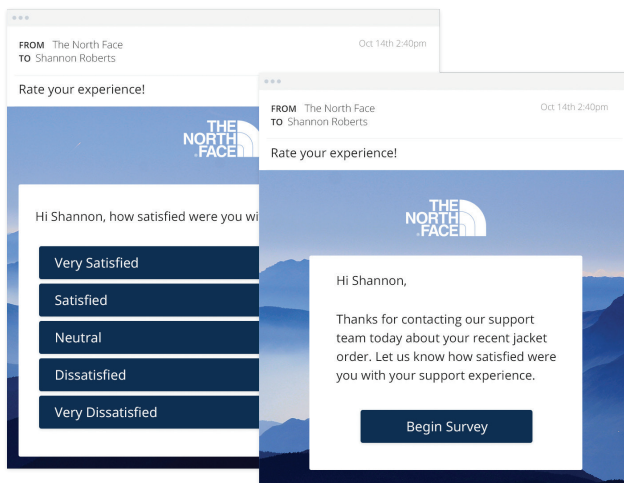
STEP 5:
CHOOSE YOUR DISTRIBUTION METHOD(S)

How you send your survey is just as important as when you send it. With so many digital platforms, there are a number of ways to distribute customer surveys. Here's an overview of the most common options. When you're deciding which channels to use, make sure to prioritize the ones that make the most sense for your customers.

EMAIL & LIVE CHAT

Email is by far the most effective communication channel for brands, and it's the most popular survey distribution method today. You can personalize and automate email surveys to collect feedback right after key customer interactions, and you can easily segment your lists to target specific customers. Similarly, live chat surveys are great because they collect contextual feedback right after an agent ends a chat with a customer. Asking for contextual feedback on a specific product or experience boosts response rates and guarantees more valuable feedback.
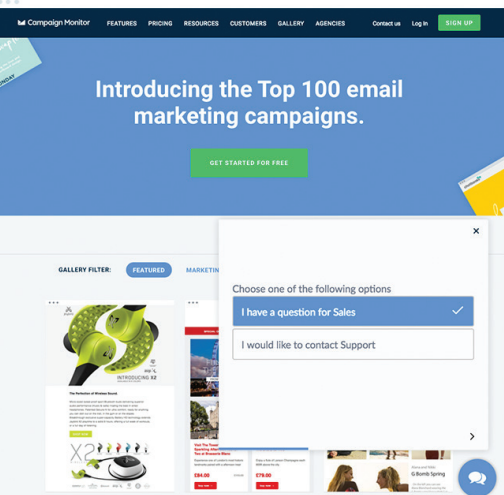
WEBSITE & APP

Web and app surveys give your customers a convenient way to share feedback whenever they're browsing your site or using your apps. Web surveys are incredibly versatile too. Many companies use them as lead forms on their homepage. When visitors fill out the survey, a contact is created or updated in Salesforce automatically. You can even place a web survey on your Contact and Help pages, using it as an intake form that automatically creates support cases when customers say they need help.

BLOG & KNOWLEDGE BASE

Content is king, but we often fail to get the most out of the content we produce. Blog and knowledge base surveys encourage content teams to continually revisit and optimize their existing content. Plus, these surveys allow readers to engage with content in a meaningful way before they navigate elsewhere. Rather than reading an article and moving on, they can rate it, leave comments, and ask questions. That kind of ongoing feedback helps your team narrow in on the content that really resonates with your audience.
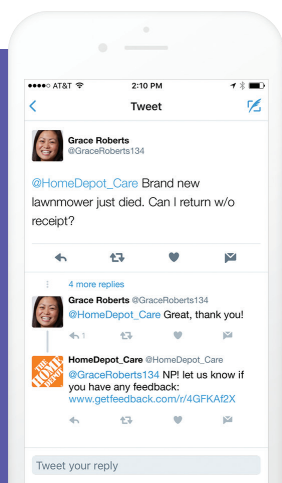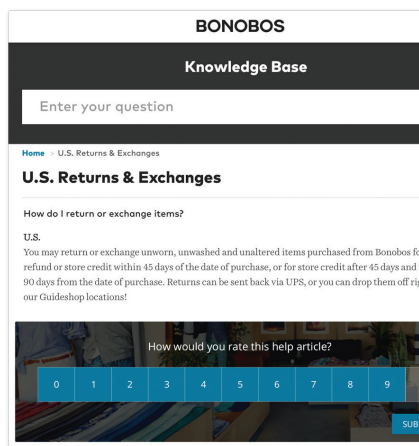
SOCIAL MEDIA

Social surveys are a great way to quickly boost engagement. You can easily share customer surveys on Twitter, LinkedIn, and Facebook, and hear from social followers you wouldn't normally engage. Remember, social is noisy, so it's important to make every survey ask clear, concise, and interesting. Consider offering an incentive for participating, and treat each social survey as an opportunity to connect with influencers.

STEP 6:
CREATE YOUR SURVEY EMAILS

If you're sending customer surveys via email, then you should put serious thought into the design and content of those email invitations. A bad survey email doesn't just deter customers from sharing feedback—it can spoil your brand image. Here are some simple, strategic ways to maximize engagement with great survey emails.

INTEGRATE EVERYTHING

Are you using your email marketing platform for survey distribution? If so, make sure it's thoroughly integrated with your survey tool and your CRM. By syncing the three, you eliminate manual work and avoid duplicate data. For instance, with GetFeedback for Salesforce, you can set up a Case-Closed workflow to completely automate customer support surveys. Plus, integrating the three allows you to personalize the survey experience a bit more. You can add merge fields to your surveys to pull in contact info, customize questions based on purchase history, and more.

Visit getfeedback.com/service-cloud to learn more about automating survey distribution with Salesforce.
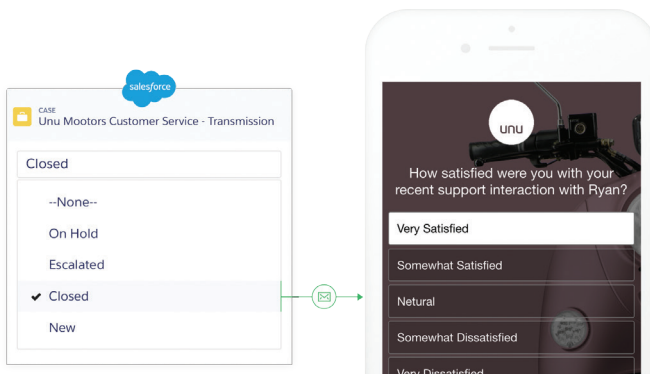
DRAFT A GREAT SURVEY EMAIL

Ready to start drafting? First decide what kind of emails you'll create: plain text or HTML. The majority of companies opt for HTML emails, which boost engagement and offer more flexibility. Whichever way you go, make sure your emails are clear, concise, and on brand.

Here's a quick survey email checklist to reference while you work on your email content.

- ⊘ Include a personalized subject line
- ⊘ Add a friendly greeting that addresses the recipient by name
- ⊘ Explain the purpose of the survey
- ⊘ State how long it will take to complete the survey
- ⊘ Thank customers for their feedback in advance
- ⊘ Include a warm sign-off

EMBED A SURVEY QUESTION OR SHARE A LINK

Once your email is drafted, it's time to pop the survey link in there. There are a few different ways to do this.

- ⊘ **Embed the first question.** This is by far the best option if you want to maximize response rates. By adding the first question to your survey email, you make it ridiculously easy for customers to respond. They don't even have to leave their inboxes. With GetFeedback, you can also generate a beautiful survey email with an embedded question, then export the HTML and send it through any email provider that supports HTML, including Salesforce!

Embedded questions increase survey engagement by 210% and survey completion by 125%

- ⊘ **Create a custom button.** If you don't want to embed a question, you can still create a visually appealing invitation by adding a bright CTA button to your email. Just create your custom button or image, then link that image to your survey. Voila.

- ⊘ **Just share the hyperlink.** It's not ideal, but it's always an option.
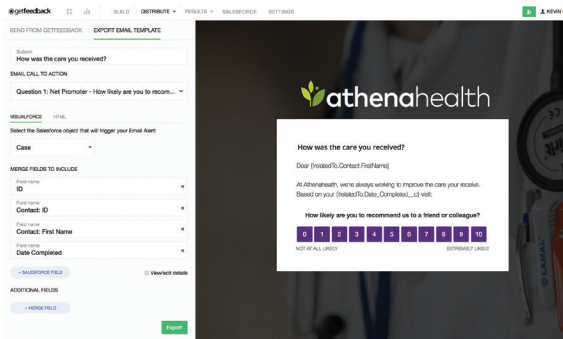
STEP 7:
TEST YOUR SURVEY

Have all your ducks in a row? It's time to test! This step will vary considerably depending on your distribution method and integrations, but there are some general steps you can take to ensure it goes off without a hitch.


TAKE IT YOURSELF

Here's a survey checklist you can use when you're testing out your survey. Make sure to view it on desktop and mobile.

- ⊘ Question order is logical - each one flows well into the next
- ⊘ Skip logic works - I'm presented with the right questions based on my answers
- ⊘ Text is clear and readable - the background image isn't too bright/busy/crowded
- ⊘ I don't have to scroll to view all my answer options
- ⊘ Buttons are easy to click

TEST OUT YOUR DISTRIBUTION

If you're sending surveys via email, make sure to test out email delivery. This is especially important if you're triggering surveys based on actions in Salesforce. We recommend setting up an email alias and acting as the customer, then going through the entire process yourself. For instance, if you're going to send Case-Closed surveys with GetFeedback for Salesforce, you should create a case with an alias customer email, close that case, verify the email survey arrives, take the survey, then verify your feedback properly maps into Salesforce.
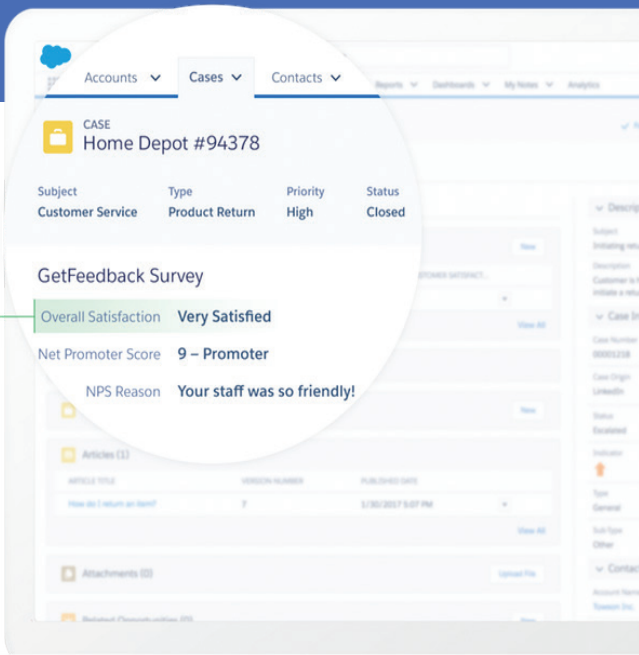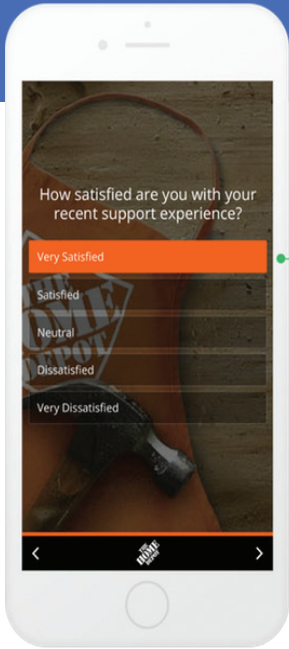
STEP 8:
PLAN YOUR ANALYSIS & FOLLOW-UP

Before you send a survey, you need a plan to handle the responses. You already brainstormed some of these processes back in Step 2. Return to that list as you think through your options here.
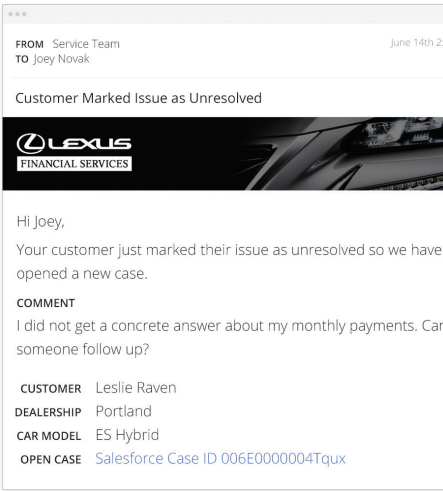

WILL YOU CREATE A REMINDER CAMPAIGN?

Your customers might need a gentle reminder to complete your survey.

- If you sent the survey via email, plan one or two reminder emails to improve your response rates. These emails should be created and scheduled before the survey goes out so the reminders aren't lost in the process.

- If the survey is on your social channels, be sure to promote it several times and remind customers about the deadline to participate.

- If the survey is on your website or blog, consider adding a pop-up message or a banner that reminds visitors to complete your survey.

WHO'S RESPONSIBLE FOR ADDRESSING CUSTOMER FEEDBACK?

Once your first customer survey is live, there's no going back. Customers will expect some sort of follow-up action. That's why every customer survey needs a point person who's responsible for analysis and action plans. In order to get the ball rolling immediately, we recommend setting up custom notifications or workflows that kick the follow-up process into gear right after a customer shares feedback.

FROM Service Team
TO Joey Novak

June 14th 2:

Customer Marked Issue as Unresolved

LEXUS
FINANCIAL SERVICES

Hi Joey,

Your customer just marked their issue as unresolved so we have opened a new case.

COMMENT
I did not get a concrete answer about my monthly payments. Car someone follow up?

CUSTOMER Leslie Raven
DEALERSHIP Portland
CAR MODEL ES Hybrid
OPEN CASE Salesforce Case ID 006E0000004Tqux

WHERE WILL YOUR SURVEY RESULTS LIVE?

We've touched on this a bit already, but mapping survey results into your CRM is the best way to leverage customer feedback and avoid checking multiple applications daily. GetFeedback for Salesforce customers can decide exactly how and where to store their survey results in Salesforce. When customers respond to Salesforce-aware surveys, GetFeedback automatically updates the contact or case record, so teams can view real-time feedback without leaving Salesforce.

Visit getfeedback.com/salesforce to learn how integrated customer feedback helps you get more value out of Salesforce.

HOW WILL YOU ANALYZE THE RESULTS?

Your survey software should have a centralized dashboard that helps you analyze feedback at a glance, while also providing access to more detailed reports. Refer to your list of goals to make sure you're monitoring the correct metrics as well. If you're mapping survey results to Salesforce, you can also create reports and dashboards from the feedback you collect. It's an easy way to centralize feedback alongside other key customer data.

STEP 9:
SEND YOUR FIRST SURVEY

Make sure that everyone involved in the process is aware of the kick off date so they're ready to handle their assigned tasks. You should also set up a calendar that plots out the last day for responses, when reports are due, and a meeting to discuss the results.

When you're ready to go, go!
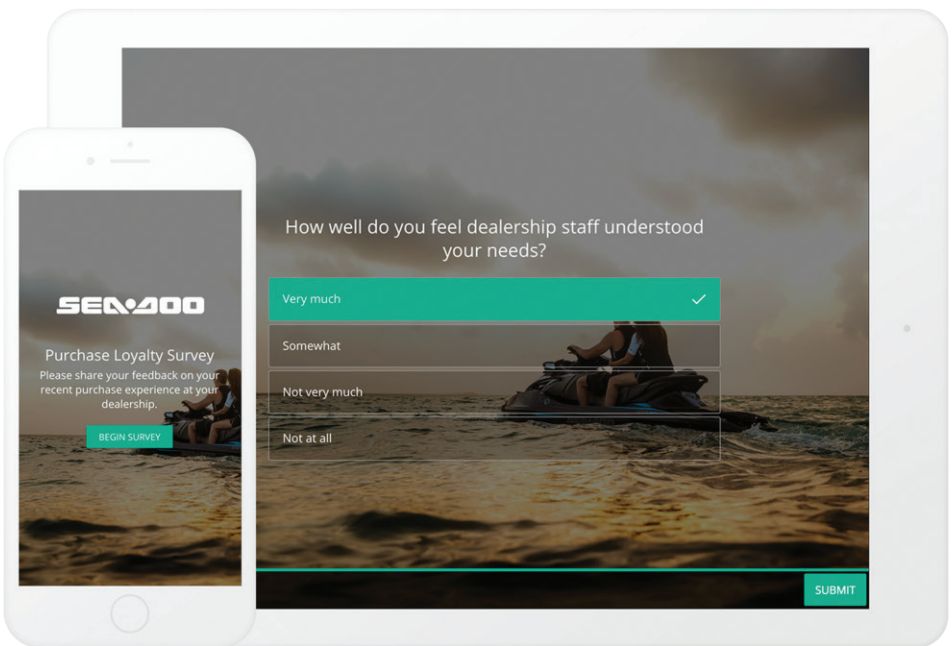
STEP 10:
ANALYZE, ACT & IMPLEMENT

Once you've gathered customer feedback, it's time to utilize it. Revisit your strategy in Step 2 and loop in key players on your team. If feedback has revealed problems with your customer service processes, talk it through with the support manager to create a plan of action.

It's important to understand that some feedback can be addressed immediately, while other feedback will take time to actually act on. For instance, issues with customer service may require employee training or new software to manage workflow better. Your plan will likely include both short-term and long-term solutions.

Once a change is implemented, let your customers know. If customers requested features and you release them, get back in contact to share the good news. Positive follow-ups make customers feel valued and boost customer loyalty over time. Here's a great example from a project management app, FLOW, that showcases a new feature that's the result of customer feedback.

We just released our #1 requested feature (and more)

Subtasks!

Hundreds of teams asked for it. We listened. You can now add, edit, rearrange and delete subtasks in Flow!

Cancel				Save

Announce new features on the blog

Workspace	Marketing & Sales ×
List	Add to list
Due Date	Today ×
Assigned	Cyrus ×
Subscribers	Subscribe people to notifications
Tags	Add tags
Subtasks	✓ Write about Subtasks
	☐ Write about Design Refresh
	☐ Write about Android app
	☐ Post to blog
	☐ Post to social media
	+ New subtask

Write a comment...

⊛ get**feedback**

GetFeedback helps the world's top brands
deliver incredible customer experiences.
With our beautiful, on-brand surveys and top-rated
Salesforce integration, you can collect meaningful
customer feedback—and act on it faster.

★★★		✓
#1-rated	**7x faster**	**240% increase**
Salesforce integration	implementation than other apps	in survey response rates

Over 10,000 leading brands power their customer
feedback programs with GetFeedback.