salesforce.com SOFTWARE

CRM
INTEGRATION

A QuestionPro Publication

Collecting feedback effectively closes the loop of Customer Relationship Management (CRM). By surveying customers, you've bridged a critical gap in CRM by adding customer satisfaction to your list of CRM data points.

A better understanding of existing customer relationships allows for greater control of customer attraction, conversion, and retention as a whole. Integrating customer surveys into existing CRM systems allows for the measurement of the success or failure of every customer interaction. Sound analytics can take this data and further drill-down to identify exactly what factors are affecting the satisfaction and attitudes of your current customers.

Taken a step further, surveying customers can improve your understanding of how your products and services may be cross-sold or enhanced to improve your value to your existing customers and make your products more attractive to prospective customers.

QuestionPro provides a simple interface for creating online surveys and integrating online survey data with your Salesforce.com database.

QuestionPro and Salesforce.com bring together two important systems for managing customer data, CRM and surveying. This provides the tools necessary for measuring satisfaction of existing customers or conducting research to quantify the strengths and weaknesses of your products in the marketplace. The QuestionPro / Salesforce.com integration creates a seamless interface between your QuestionPro survey data and your database of Salesforce.com contacts, leads, and opportunities.

After developing the survey using QuestionPro's web-based wizard interface, a link is provided with custom variables for your Salesforce.com email campaign. The link contains an ID for the survey hosted at QuestionPro as well as an ID for the Salesforce.com object that you would like to integrate. Using this link, you can send invitations to your contacts in Salesforce.com to take a survey. When a respondent clicks on the link, QuestionPro will capture their survey responses locally and also populate your Salesforce.com system with the survey results.

QuestionPro.com	CRM Integration

The steps for implementing the QuestionPro / Salesforce.com interface are as follows:

    1. Create a survey using QuestionPro.
    2. Define the mapping between survey data at QuestionPro and fields in your Salesforce.com database.
    3. Create an email template in Salesforce.com containing the customized link.
    4. Invite respondents to the survey! QuestionPro automatically tallies the data and passes it back to Salesforce.com.

When generating a link from the Salesforce.com system, you will need to include the link to the QuestionPro system along with some custom variables that have been populated from the Salesforce.com system. The link should appear as follows:

Example URL:

http://www.questionpro.com/akira/TakeSurvey?id=xxx&custom1=Case&custom2={!Case_ID}

The link can include up to 5 custom variables that the QuestionPro system will automatically capture when the respondent clicks on the link. These variables will be populated by the Salesforce.com system when generating the email using email templates.

The url of the survey:

http://www.questionpro.com/akira/TakeSurvey?id=xxx

is the actual URL to the survey provided by the QuestionPro system. The xxx in the survey URL needs to be replaced with the ID to the survey hosted at QuestionPro.

The string of text:

&custom1=Case

defines the type of object in Salesforce.com.

The string of text:

&custom2={!Case_ID}

is a Salesforce.com variable that will get populated with the Salesforce.com case ID when sending the email from Salesforce.

The string of text:

&custom3={!Salesforce_Custom_Variable}

is included as an example of adding any other Salesforce.com custom field to the URL. An example may be the customer service representative ID. The link is provided by QuestionPro for each survey
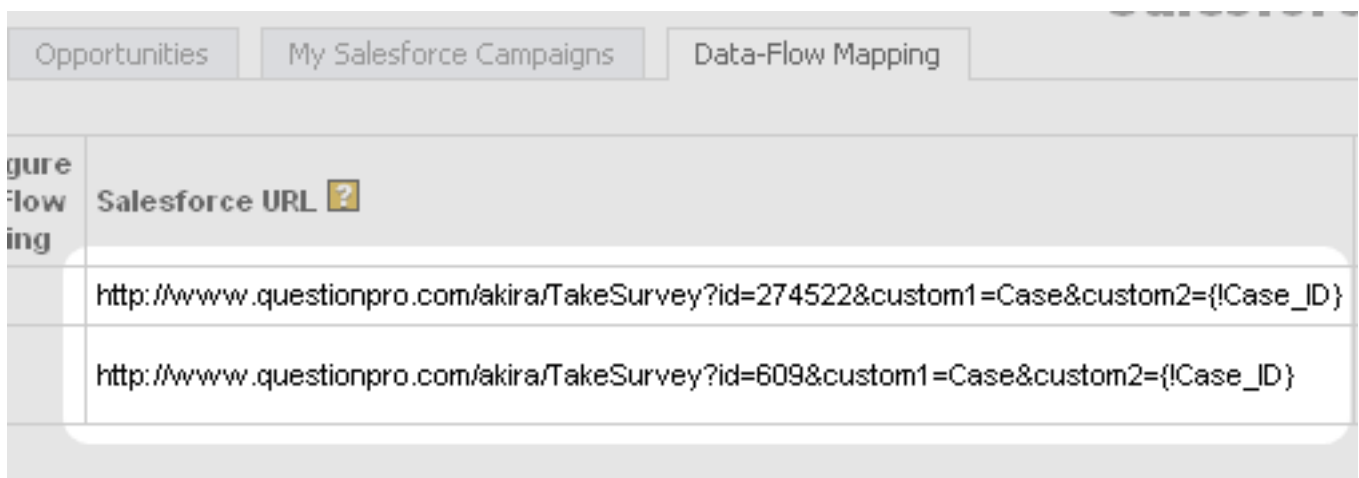
Add this link to an outbound campaign in Salesforce.com and use the mapping tool in QuestionPro to map survey responses to Salesforce.com data fields:

When a respondent clicks on the link in an email with the survey ID and custom variables configured as in the Example URL, all of the custom fields will be automatically captured and associated with the responses for that respondent. Subsequently, analysis may be done that groups survey responses by custom variables.

You have effectively enabled a two-way flow of data between your web-based Salesforce.com CRM system and your QuestionPro survey system.

Online Research Made Easy
Why more organizations choose QuestionPro.com

Superior Technology

The system has been designed from the ground up to accommodate the needs of anyone conducting online research. Our simple interface, cutting edge features, and competitive price have landed us in the top tier of web-based survey software providers. We truly believe that you will not find a better value on the web today.

Reliability and Commitment

Our absolute commitment is to the success of our clients. We recognize what our clients need to make their online research a success and we're 100% focused on creating solutions that meet and exceed these requirements.

Proven Track Record

Thousands of clients worldwide have chosen our system to conduct their online research. Companies, both large and small have chosen us as their trusted partner for conducting online research.

Security

Our system adheres to the highest level of security standards on the internet. Data security and privacy are addressed at all levels starting with survey delivery all the way through protecting your survey results.

Support

Our customers have access to an expert team of developers who are responsible for ensuring 100% client success.

SURVEY ANALYTICS LLC

QuestionPro.com
3518 Fremont Ave N #598
Seattle, WA, 98109
USA

Global / Americas
Seattle, US
+1 (206) 686-7070

Europe / Middle East
London, UK
+44 (20) 7871-4079

Asia Pacific / Australia
Auckland, NZ
+64 (9) 950-3305

For more information contact our sales team at +1 (206) 686-7070.