



Zoomerang Surveys for Salesforce

Frequently Asked Questions

Q: What is the advantage of using Zoomerang Surveys for Salesforce?

A: Online surveys are a good way to elicit feedback from customers. But there is a catch. The use of online customer surveys creates yet another information silo; you now have one more isolated source of information about your customers. There is a way to address the silo —what if you could do surveys from within your Salesforce system and have the data come back automatically into the system? Furthermore, what if you didn't have to spend a bundle integrating a survey tool with your Salesforce system? Zoomerang for Salesforce offers such a solution. It allows you to create and send surveys from within Salesforce and then map the responses back into Salesforce objects, so you can view the data in Salesforce dashboards and reports

Q: What types of things will I be able to do with the solution?

A: Various use cases include:

- Send automated surveys triggered by an event in Salesforce such as when a case is closed (customer service feedback) or when a marketing event is concluded (event feedback) or when an opportunity is lost or won (win-loss analysis). Also send surveys on demand (customer satisfaction surveys, product feedback surveys etc)
- Map survey responses from Zoomerang to any custom object in Salesforce.
- View survey results in a Salesforce report or dashboard
- View updated activity history when a survey is sent.
- Calculate NPS using our NPS widget on the dashboard.
- Create workflows in Salesforce to follow-up on Survey responses.
- Map fields from Salesforce records into Zoomerang reporting for analysis.
- Script your calls and map the data into Salesforce.
- Use Zoomerang for forms. You can use a Zoomerang survey as a web to lead form tool and then bring the form data into Salesforce CRM.
- Do all of the great things you would normally get with Zoomerang Premium: unlimited surveys and responses, mobile surveys, open-ended analysis with tag clouds, text import, and more.

Q: Can you map a survey to more than one Salesforce object at a time (i.e., accounts and contacts)?

A: Yes, you can map to multiple objects.

Q: Can the mapping feature update an existing record in Salesforce or create a new record?

A: It can both update an existing record and create a new record.

- Q: How will I be able to control the number of times someone receives a survey from my company?**
- A:** You can use Salesforce workflows to establish rules that will prevent over-surveying.
- Q: What is the best way to send one-time surveys (e.g. annual customer satisfaction survey)?**
- A:** Use a campaign and add campaign members (e.g., contacts or leads from Salesforce) who will receive your survey invitation from Zoomerang.
- Q: Will I have to log into the Zoomerang for Salesforce application each time?**
- A:** No, it is single sign on. You will just need to log in with your Zoomerang Premium username and password and your Salesforce.com username and password one time.
- Q: Will emails with my survey invitation be sent through Zoomerang or through Salesforce?**
- A:** That depends on how you deploy your survey. If you set up an automated event-triggered survey, it will be sent through Salesforce. If you send your survey through a campaign, it will be sent through Zoomerang.
- Q: Where is the data stored?**
- A:** Your individual survey responses will all still be stored in Zoomerang. Any data you map into Salesforce will then be stored in Salesforce as well.
- Tip:** If you prefer to store the survey results data in Salesforce, you can map all of your survey data into a custom object.
- Q: Can I use the application with Zoomerang Basic or Pro?**
- A:** The application only works with Zoomerang Premium.
- Q: How do I get Zoomerang for Salesforce?**
- A:** The application is listed on Appexchange® at <http://sites.force.com/appexchange/listingDetail?listingId=a0N300000025NcxEAE> . Your Salesforce admin will need to download it for you.
- Q: How long does the implementation process take?**
- A:** Zoomerang is truly a fast, easy online tool. You can download the application and purchase a Zoomerang subscription online to be fully up and running in less than an hour (even less if you're really fast)!
- Q: How do I set up an automated survey in Salesforce?**
- A:** Using the customization guide we provide, your Salesforce admin will need to do this for you.
- Q: Can Zoomerang create "if, then" questions that redirect the respondent based on their response?**
- A:** Yes, Zoomerang Premium includes a skip logic feature.
- Q: How does collaboration work with Zoomerang Surveys for Salesforce?**
- A:** Zoomerang Surveys for Salesforce will allow you to share certain survey links and results with other employees who are part of your Salesforce org. For example, you can view

the Salesforce dashboard and the updated contact records even if you don't have Zoomerang. Multiple people in the same company who are using the Salesforce app (or those who aren't) can also be linked together to collaborate our enterprise feature.

Q: Will I be able to see the survey responses in someone's individual Salesforce record if they responded to my survey?

A: Yes, if you shared the individual survey results when you set up the survey, there will be a link to the responses from the Salesforce record.

Q: How can I contact Zoomerang about Zoomerang Surveys for Salesforce?

A: Call us at 877-628-2589 or email salesforce@markettools.com. You can also fill out our contact form at <http://www.zoomerang.com/salesforce>