
Top Ten Reasons to Send Surveys with Salesforce

Once you understand why, you'll be eager to learn how.

Who are your best prospects? Which customers might be at risk? How satisfied are your customers with your company? Why did you win or lose a specific deal?

Whether you're in sales, marketing, or customer service, you need reliable, timely answers to these and other questions to be effective in your job. You need to keep your finger on the pulse of your customers so that you can improve sales processes, optimize marketing activities, boost customer satisfaction, and improve bottom-line profitability.

In other words, if you want to take CRM to the highest level, you need a fast, easy, affordable way to survey your customers.

This paper presents ten great reasons it pays to send surveys as part of your day-to-day activities on Salesforce—and a quick overview of how Zoomerang Surveys for Salesforce makes it a fast, painless process.

True Customer Insight Comes from Constant Feedback

Every company claims to value the opinions of its customers, employees, and partners. Many companies, however, fail to appreciate the full range of benefits feedback can deliver, or the value of collecting and monitoring input continuously.

Here are the top 10 ways that sending surveys with Salesforce CRM—and bringing the feedback directly into Salesforce—can deliver vital insights that improve the effectiveness of sales, marketing, and customer service reps as well as overall business performance.

1. Get an accurate read on customer satisfaction

Many managers wonder how frequently they should conduct customer satisfaction surveys. The answer depends on the size of the customer base and the purpose of the research. There are two key types of surveys, and they serve very different purposes:

Measuring customer satisfaction is one of the most popular uses of surveys. Annual, semiannual, or quarterly customer satisfaction surveys can give you the hard data you need to improve customer relationships, expand business opportunities, refine practices, reward top performers, improve marketing activities, and even recruit new talent to the sales, marketing, and customer service teams. In addition, tracking customer satisfaction levels continuously over periods of time allows you to compare yourself against the industry, specific competitors, or your own goals and expectations. You can even create alerts within Salesforce so that you can follow up with dissatisfied customers immediately.

2. Know why you won (or lost)

Survey responses can help you understand what works with customers, what doesn't, and why, so you can focus your selling, marketing, and service strategies and refine your product development roadmaps. Armed with good data, you can allocate resources more efficiently; align offerings more closely with customer requirements; and increase customer loyalty, revenue, and profitability.

3. "Scorecard" your prospects and customers

When you use surveys to gather key information about customer attitudes, opinions, and intentions, you can map that data into Salesforce to score and rank customers by their expected purchases, their expected revenue contributions, or their overall profitability. You can also determine who your best prospects are, as well as which customers might be at risk and what it would cost to lose them.

4. Evaluate sales and service reps

Surveys can help you determine which sales and service representatives are performing well from the customer's perspective, providing a basis for rewards or incentives as part of the total compensation package. Knowing what types of sales and service practices resonate best with customers also allows you to create and share best practices among your teams.

5. Get ideas for new products, services, and promotions

Everyone has ideas. Your customers. Your employees. Your vendors. But how do you identify the ideas that have real market potential, or that will lead to an effective advertising campaign or promotion? Surveys can help you generate ideas, determine which ideas to get into the development funnel, and transform big ideas into business breakthroughs.

6. Measure the effectiveness of marketing activities

If you want to know how customers will respond to an ad, a promotional offer, or a change in your brand identity, you can guess and take your chances—or you can send out a survey. Sending a survey to your customers and prospects gives you visibility into whether different messaging resonates better with specific target groups, and helps you tailor your marketing for optimal results before you execute the campaign. It arms you to send the right message to the right people.

7. Gauge employee satisfaction

Online surveys are the ideal mechanism for soliciting employee feedback, since they provide the anonymity that is so essential to candid feedback when sent via web deployment. Many companies use online surveys to conduct management evaluations, or to ask for feedback on training requests, benefit offerings, professional development, or even events to be held at a company picnic or retreat. You can use surveys to screen prospective employees as well, polling them on the number of miles they're willing to commute, whether they will travel, and other data you may wish to collect.

8. Plan or evaluate an event

A survey is an easy way to collect multiple data points from a large group of people, so it can be a useful tool in planning and evaluating an event. For example, you could use an online survey to ask customers about their planned arrival times to a trade show, their meal preferences, and so on; and after the event you could send a separate survey to ask for their opinions about the value of the trade show, their overall satisfaction with the show, whether they plan to attend next year, and so on.

9. Get specific customer information

It's easy for customer records to become outdated, and contact/prospect lists are often incomplete. Through online surveys, you can quickly fill in the gaps in your customer records and update customer information in Salesforce.

10. Share best practices

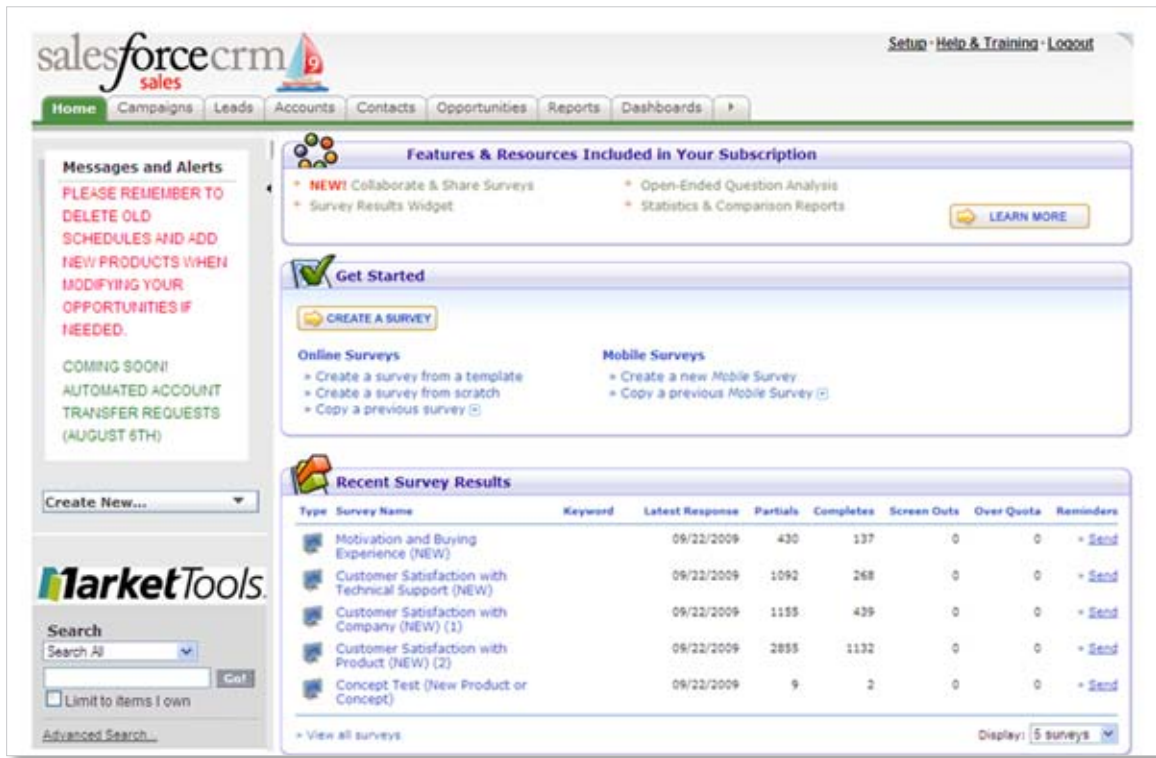
Surveys are a quick and efficient way to gather wisdom and insights you can't find elsewhere. For example, a survey question about how to handle a sensitive customer issue or business question can generate a wide range of responses and useful advice that can be put directly into practice.

Zoomerang Surveys for Salesforce: Synergies and Scenarios

It pays to take advantage of a survey tool from within Salesforce. But not just any survey tool. Zoomerang has distinct advantages—in ease of use, sophistication, and price. It is important to consider the full range of capabilities you require before you select an integrated online survey solution. This section highlights a few of the key features and usage scenarios of Zoomerang Surveys for Salesforce.

All the Functionality of Zoomerang, All Within Salesforce

As a Salesforce.com® customer, you've demonstrated your commitment to superior customer relationship management. Zoomerang Surveys for Salesforce complements the industry's leading CRM solution with the industry's leading survey tool, so you can take CRM to new heights. Every Salesforce user gains access to the fastest, easiest way to survey customers and update their Salesforce records, right at their fingertips.

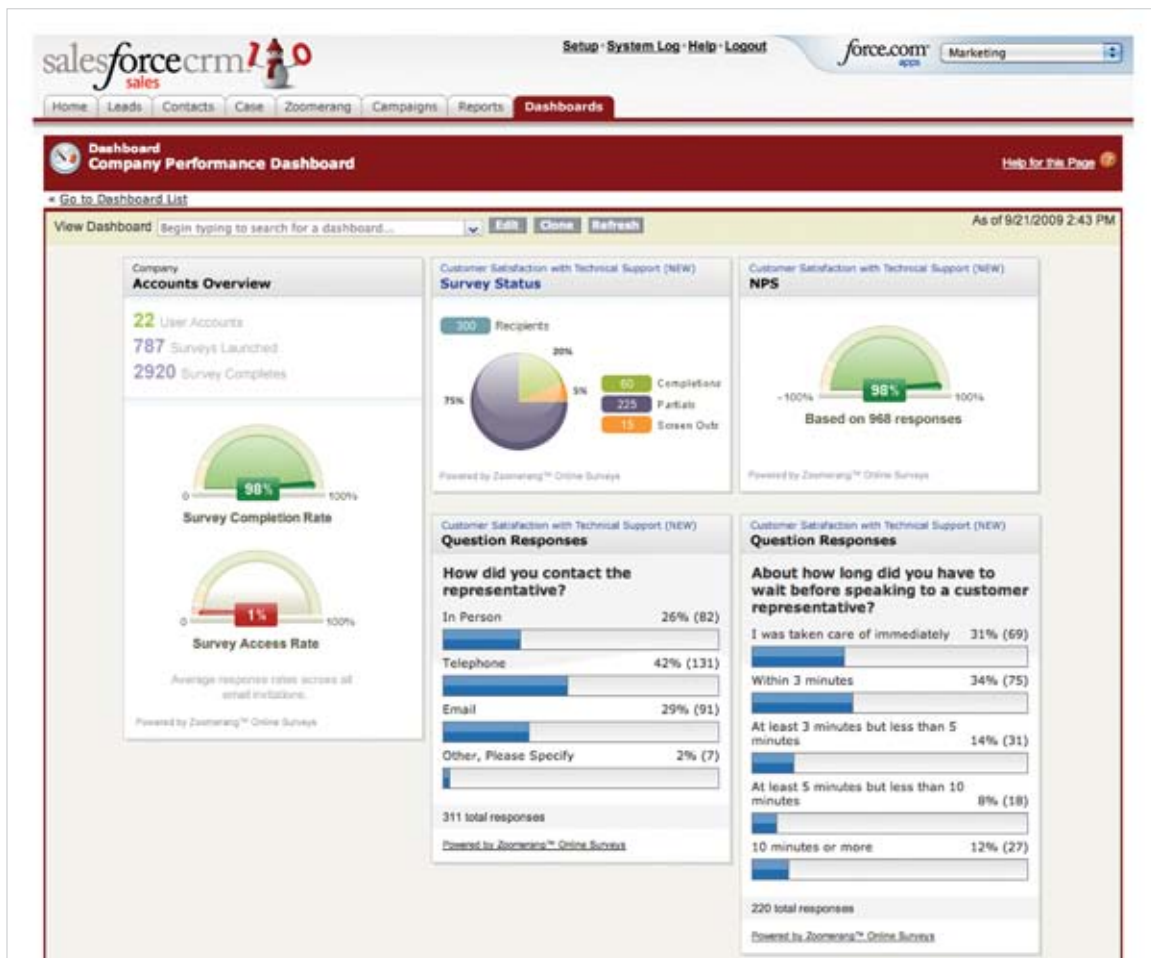


Zoomerang customers—including over 70 of the Fortune 100 companies and thousands of small and mid-sized businesses—have sent more than 100 million online surveys since 1999, and 97% of Zoomerang customers love the product. With Zoomerang Surveys for Salesforce, you get all the powerful features of Zoomerang at less than half the price of the other leading survey application on appexchange™.

Zoomerang is fully and seamlessly integrated with Salesforce CRM. A single sign-on saves you time in accessing the full functionality of Zoomerang; just click the Zoomerang tab in Salesforce and take advantage of the full range of Zoomerang features and capabilities:

- > **Create** online surveys with free survey templates that let you include custom branding, PowerPoint charts, skip logic, tag clouds, and more. There's no need to program, learn the intricacies of HTML, or hire a designer; just use a template and save time and money.
- > **Send** surveys to contacts in your Salesforce database seamlessly from a campaign. The activity history in the Salesforce campaign and contact/lead records will be updated showing the survey was sent and include a link to the survey and individual results. You can also automate the sending of "triggered surveys" by an event, such as a case closing, so you can keep in close touch with key customer groups, and follow up with them in a timely manner.

- > **Analyze** the results using advanced reporting features including charts, text import, data output, cross-tabs, open-ended analysis, and more. You can monitor your survey performance and insights from surveys on the Salesforce dashboard, which shows you key metrics and allows you to track and consistently improve performance. You can use our “tag cloud” feature to easily group your hard-to-handle written responses by keyword or word association from a survey. You can see responses to a specific survey in the contact record if the survey is sent via campaign—or you can bring the results directly into Salesforce dashboards and reports and view it there.
- > **Act** on survey data by creating workflows within Salesforce CRM to create automated email alerts letting an employee know to follow up with a lead or contact based on their response to a survey (e.g., Call a customer who is very dissatisfied to resolve the issue before you are at risk of losing them.)
- > **Share** insights with your colleagues via multi-user survey sharing and collaboration capabilities.
- > **Map** data from Zoomerang to Salesforce—you can easily map fields from Zoomerang into Salesforce and vice versa, allowing you to improve data quality and gain deeper insights.



Clear Business Advantages

Zoomerang Surveys for Salesforce enables you to achieve the full range of benefits and business advantages described earlier in this paper—keeping a finger on the pulse of customer satisfaction, evaluating sales and customer service reps, scorecarding customers and prospects, and so on. With Zoomerang Surveys for Salesforce you gain fast, easy access to powerful customer insights—so you can:

- > **Improve Marketing ROI.** You can use Zoomerang Surveys for Salesforce to optimize marketing campaigns and improve the data quality of contacts or leads through profiling surveys. You can also use event-triggered surveys to analyze why specific opportunities were won—or lost—and through the Salesforce dashboard you can monitor those metrics, so you can improve sales processes and increase marketing ROI.
- > **Increase Customer Satisfaction.** You can quickly and affordably measure customer satisfaction through regular surveys of contacts from a campaign. You can evaluate service rep performance with feedback from event-triggered surveys (such as “case-closed” surveys), or calculate likelihood to recommend. If a specific customer is dissatisfied, the customer service manager can be notified, allowing for immediate follow-up and corrective action. And all key metrics can be reviewed and monitored via a customized Salesforce dashboard, so vital information is always accessible when you need it.
- > **Enhance Sales Effectiveness.** Creating and sending client surveys is fast and easy with Zoomerang Surveys for Salesforce. Marketing or sales can easily send regular surveys as an email to each account in their Salesforce contacts list, and even map Salesforce data, such as “products purchased,” into Zoomerang for further analysis to help aid sales calls. The products work together so sales and marketing can work together more efficiently.

Usage Scenarios by Business Function

Zoomerang Surveys for Salesforce is an extremely versatile tool that can be used by individuals and teams throughout the organization to achieve their specific goals. Just a few examples by business function:

Customer Service Teams

- > Send out a survey to contacts from a campaign and monitor key performance indicators such as overall satisfaction or likelihood to recommend and view likelihood to recommend widget in the customized dashboard.
- > Evaluate customer service rep performance on an ongoing basis with event-triggered surveys; create an alert to follow up with dissatisfied customers and address problems immediately.
- > Map survey responses into Salesforce so service reps have more information about customers—such as preferences about when to be contacted.

Marketing Teams

- > Use Salesforce to deploy all marketing-related surveys that touch customers/prospects, such as customer satisfaction, event surveys, expiration surveys, and so on, and map the responses into lead or contact records.
- > Develop a data quality plan that uses profiling information collected through profile surveys; e.g. collect enough data to accurately eliminate duplicate records.
- > Use profiling surveys to collect more data about leads and contacts, such as titles, departments, and purchasing behavior—and use that data to improve marketing programs and ultimately increase marketing ROI.

Sales Teams

- > Use Zoomerang surveys to assess how well the sales process is working; e.g. collect data on why each deal was won or lost, what customers are saying about their experience, etc., so you can coach specific sales reps and establish best practices.
- > Monitor customer satisfaction over time so you can take the appropriate actions and improve business performance.

About MarketTools

MarketTools is the leading technology and service provider of Customer Insight Management solutions for the world's market leaders. Through a unique combination of best-in-class insight and feedback platforms, quality-assured global panels, and research innovation, MarketTools enables companies to innovate and identify new opportunities, optimize product success and build customer loyalty. As the first company to make online surveys widely available on the Web, MarketTools continues its market-leading position by providing the broadest range of powerful, accurate and integrated customer insight technologies that empower companies to become the most customer-centric organizations in their industries. MarketTools' premier portfolio of technology-based insight brands includes MarketTools.com,[™] CustomerSat,[™] TrueSample,[™] and ZoomPanel[™].

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About Zoomerang

Zoomerang offers an easy way for businesses to get fast answers to important questions. With more than 100 million surveys sent and counting, Zoomerang has grown rapidly and has been adopted worldwide. Zoomerang is part of the MarketTools family, a leading provider of technology and advisory services for conducting Web-based market research.

For Subscribers Only

This White Paper is provided to our Zoomerang subscribers as an added benefit to the survey service. Zoomerang provides best practices and research methodology that our subscribers find useful to increase both the quality and impact of their surveys.