Smart Forms & Surveys · TwinStack Solutions

USE-CASE EXAMPLE · EDUCATION

Use-case example: course feedback you can report on

How a training provider could collect end-of-course feedback as Salesforce records, and follow up quickly on poor ratings.

ILLUSTRATIVE EXAMPLE

Riverbend Skills Academy is a fictional organisation. This is an example of how a team could use Smart Forms & Surveys, not a customer story, and it makes no claims about measured results.

The organisation

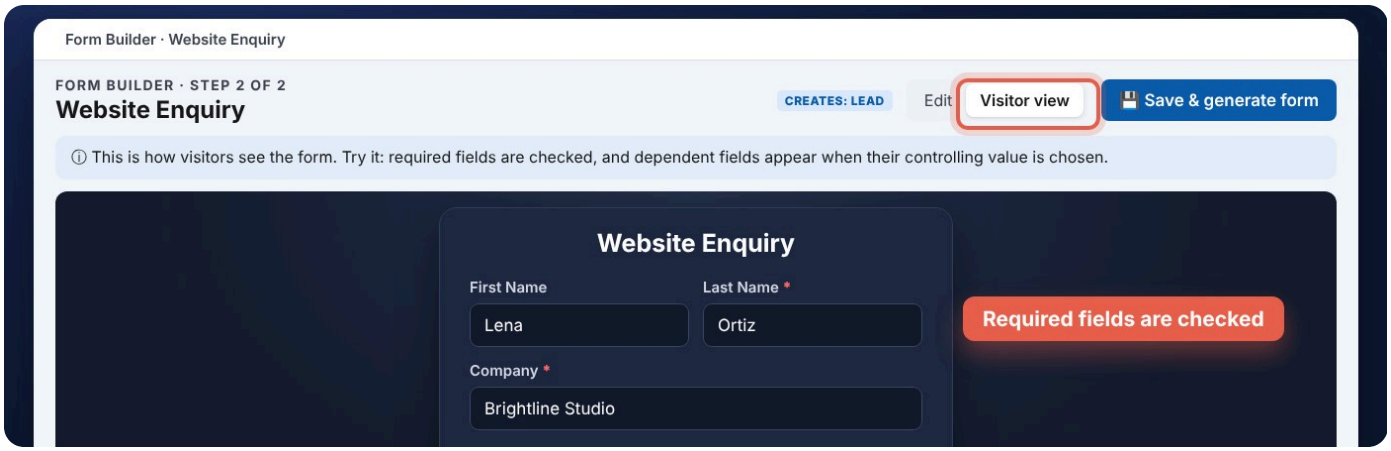
Riverbend Skills Academy (fictional) runs short professional courses. Course managers want to see feedback by course and trainer, next to the student records they already keep in Salesforce.

The challenge

- Feedback is collected in a separate survey tool and exported once a term.
- Poor ratings are spotted too late to fix anything for the current group.
- Free-text answers are hard to compare between courses.

How they could set it up

Setting	Their choice
Form	End-of-Course Feedback
Each response creates	Course Feedback (custom object)
Questions	Your name, email, course (picklist), trainer (picklist), overall rating (picklist), would you recommend us (checkbox), what could we do better (long text)
Required on this form only	Course and overall rating
Conditional question	"What could we do better?" appears only when the rating is Poor or Fair
Shared on	The last slide of each course and the follow-up email



Visitor view lets the academy check the survey exactly as students will see it. Sample data.

What changes for the team

- **Reports, not exports.** Picklist answers group cleanly by course and trainer in standard reports and dashboards.
- **Faster follow-up.** If they want, a record-triggered Flow they build can alert the course manager when a Poor rating arrives.
- **Focused detail.** Only unhappy students are asked what to improve, so the free text is the feedback that matters.
- **One place.** Feedback sits in Salesforce next to the student and course data the academy already uses.

Try it in your org

1. Create a feedback object with picklists for the answers you want to chart.
2. Build the form, make the key questions required, and add the conditional follow-up.
3. Preview in Visitor view, save, and share the link at the end of each course.
4. Build a report grouped by course and rating.

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