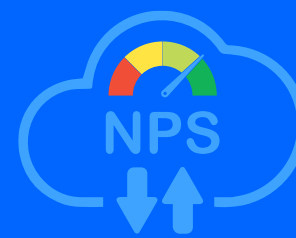


# Reimagining the Customer Journey with NPS Survey by SalesHub

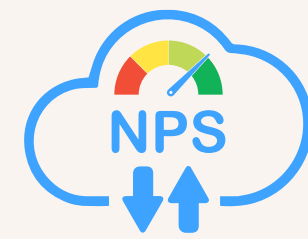
From Awareness to Loyalty - Measure, Improve, and Grow Through Intelligent Feedback Automation.



[saleshub.info/nps-survey](https://saleshub.info/nps-survey)



available on  
**AppExchange**



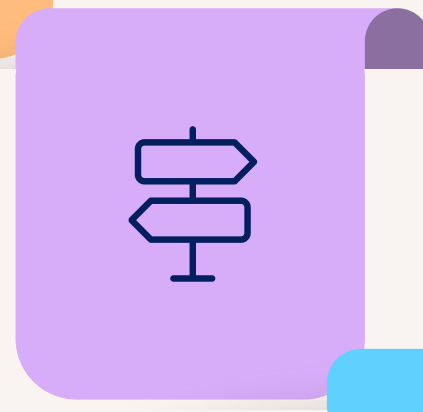
## Awareness Phase – Campaign Surveys

Customer notices your brand for the first time



## Consideration Phase – Pre-purchase forms

They explore options and compare alternatives



## Decision Stage – Case-closed CSAT

The customer makes a purchase decision



## Service Experience – NPS Follow-up

Customer uses your product or service



## Post-Purchase – Post-purchase forms

They share feedback or seek ongoing support

# Understanding the Journey

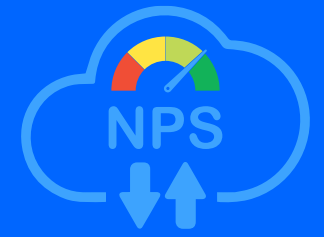
Key stages in the typical customer experience lifecycle

Awareness → Consideration → Decision → Service → Post-Purchase → Loyalty

Our NPS Survey platform enables Salesforce users to capture insights at each stage of this journey.



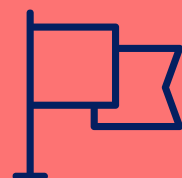
# 3 Quick Wins for Mapping CX with NPS Survey by SalesHub



Start simple – launch your first survey in Salesforce today

## Start Simple

Begin with one journey, then expand using our no-code builder.



## Use Data

Leverage CX360 Dashboard to base actions on real insights.



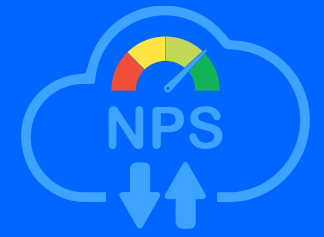
## Stay Updated

Sync feedback automatically via Salesforce Flows.



# Customer Journey Actions

Every touchpoint is a chance to listen.



Collect and analyze data from real customer behavior to gain valuable insights and understanding.



- Website Visit → *Pop-up micro survey*
- Social Media → *Campaign engagement survey*

Identify and analyze all the key moments and significant highlights in the entire experience.

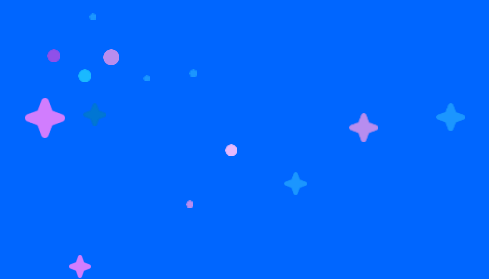


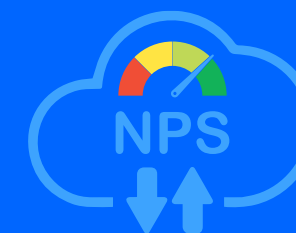
- Checkout Page → *Post-purchase CSAT*
- Customer Support → *Case-closed survey*

Focus on enhancing areas where there is currently low satisfaction or noticeable friction.



- Feedback Form → *Follow-up NPS survey*





## Website Visit

User browses your site for the first time



## Social Media

They engage with brand posts or ads



## Email Contact

Receives updates or promotional messages



## Customer Support

Reaches out for help or questions



## Checkout Page

Completes an online purchase



## Feedback Form

Shares thoughts or ratings after use

# Key Points

SalesHub NPS Platform overlays this funnel with real-time feedback.



# Customer Journey Funnel



Customer progression from first contact to brand loyalty.  
SalesHub NPS Platform overlays this funnel with real-time feedback.

## Discovery

Learns about the brand

## Evaluation

Compares with other available options

## Adoption

Starts using the product or service

## Interest

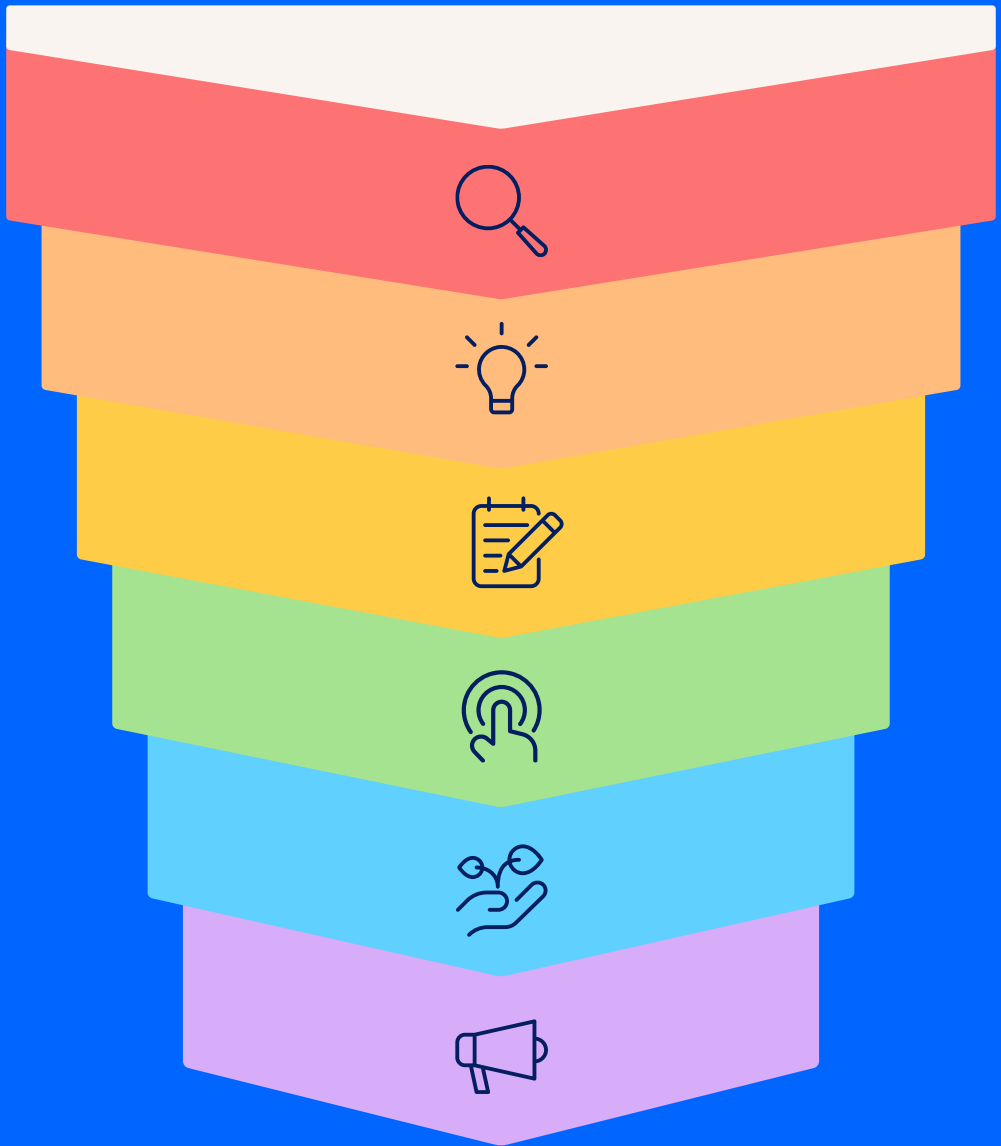
Seeks more information or benefits

## Action

Makes the final purchase

## Advocacy

Recommends the brand to others



See how your customers move from first contact to loyalty — and how NPS identifies friction early.

# Customer Insights



Insight categories to monitor during mapping.

NPS Survey captures emotion, identifies pain points, and quantifies loyalty - all inside Salesforce.

## Emotions



Monitor and evaluate how customers feel at every stage of their journey and experience.

NPS Survey Lite



## Pain Points



Identify specific areas where users might encounter frustration or become stuck during their experience.

Survey Builder Pro



## Opportunity



Identify areas where improvements can be made or value can be added for better outcomes.

CX360 Insights



## Goals



Gain a deeper understanding of what users want to achieve and how to assist them effectively.

Close the Loop



View CX360 Insights in your Salesforce Dashboard.



# Feedback Loop



Using feedback to improve future journeys.  
Feedback drives evolution - powered by SalesHub automation.

## Collect Input

Consider utilizing surveys or reviews to gather valuable feedback from your users.

Surveys trigger automatically

## Test Again

Take the time to thoroughly reevaluate and determine if these changes help.

Flows create tasks for detractor follow-ups



## Analyze Trends

Search for recurring themes or frequently repeated issues in the data.

Insights appear in CX360

## Make Changes

Adjust the process based on the findings and insights gathered from research.

Results measured in the next cycle

# Optimizing Flow

Streamlining the journey for better results



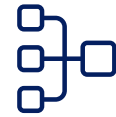
## SalesHub NPS Platform Tools



01

**Audit Journey →  
CX360 Dashboard**

Review current  
experience from user  
view



02

**Fix Bottlenecks →  
Automation Engine**

Remove steps that  
cause drop-off



03

**Align Teams →  
SalesHub Task Alerts**

Ensure departments  
work toward common  
goals



04

**Improve Tools → No-  
code Survey Builder**

Use tech to reduce  
friction or delay



05

**Track Success →  
Response Analytics**

Measure KPIs like  
retention or  
satisfaction

Optimize flow using actionable feedback



# Ideas in Motion



Six connected stages to spark customer insight and innovation.  
Our NPS Survey solution fuels innovation by surfacing customer-driven insights.

## Define Gaps

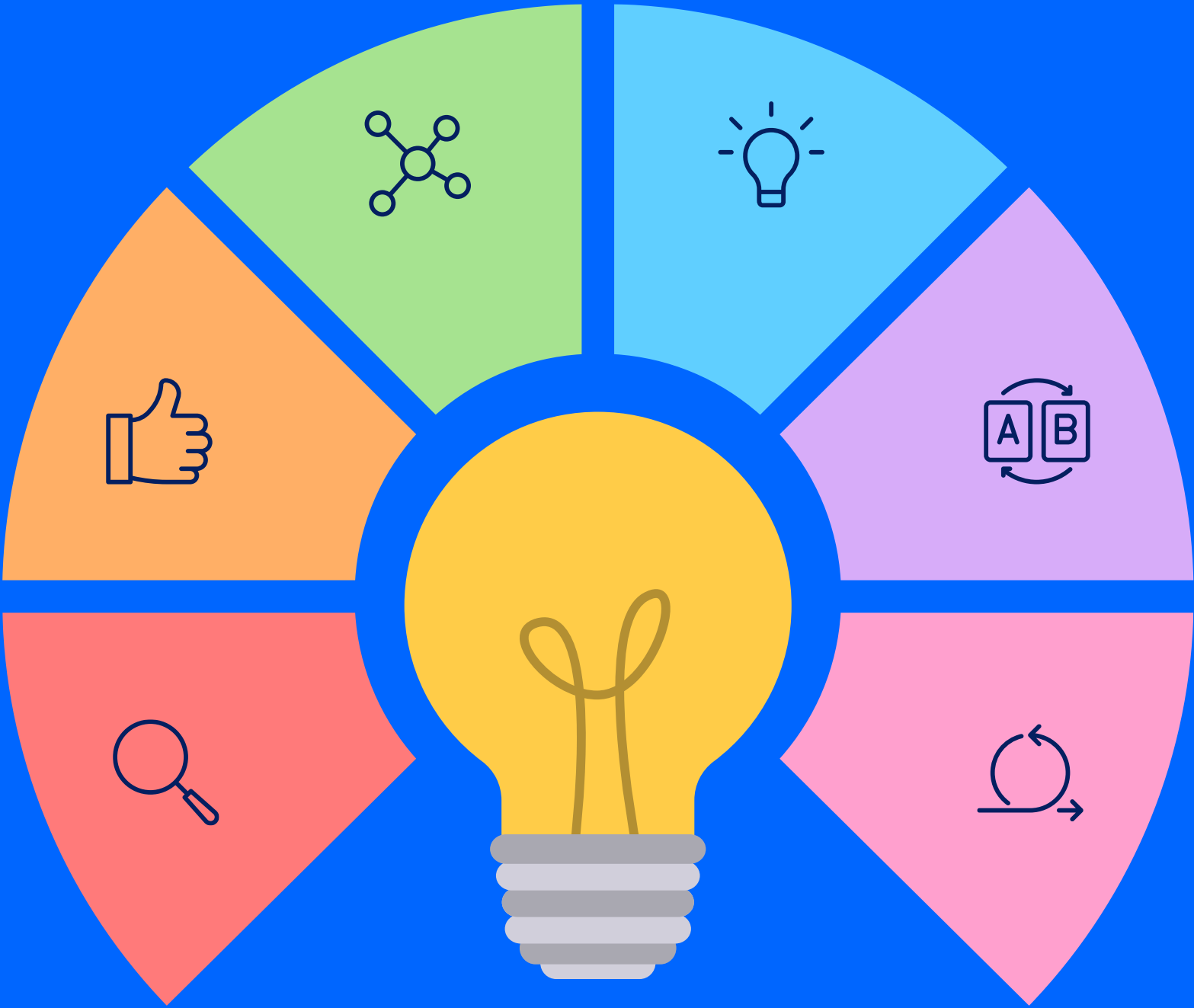
Identify where expectations aren't being met

## Gather Feedback (Survey Builder)

Collect input from real user experiences

## Discover Needs (Response Manager)

Learn what the customer is trying to solve



## Generate Ideas

Brainstorm improvements or new touchpoints

## Test Changes (CX360 Dashboard)

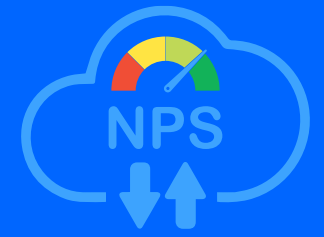
Try out updates with real users

## Evaluate Results (AI Insights)

See what worked and what still needs fixing



# Time-Based Stages



How the journey unfolds over time. Quarterly customer touchpoints.

A customer notices advertisements or engaging social media posts online.



Q1 Awareness → *Campaign surveys*

Concludes by finalizing a well-considered decision and promptly places the order utilizing SF Flow.



Q3 Purchase → *Post-sale CSAT*



They thoroughly review a variety of multiple options and different price ranges.

Q2 Comparison → *Pre-purchase feedback*



Returns for additional purchases or shares their positive and encouraging feedback.

Q4 Loyalty → *NPS recurring surveys*

Schedule recurring surveys aligned with your customer lifecycle.

# Transform Your Customer Journey with SalesHub's NPS Survey Platform.

Built on Salesforce. Powered by SalesHub.



Book a Demo – [saleshub.info/nps-survey](https://saleshub.info/nps-survey) | [support@saleshub.info](mailto:support@saleshub.info)