

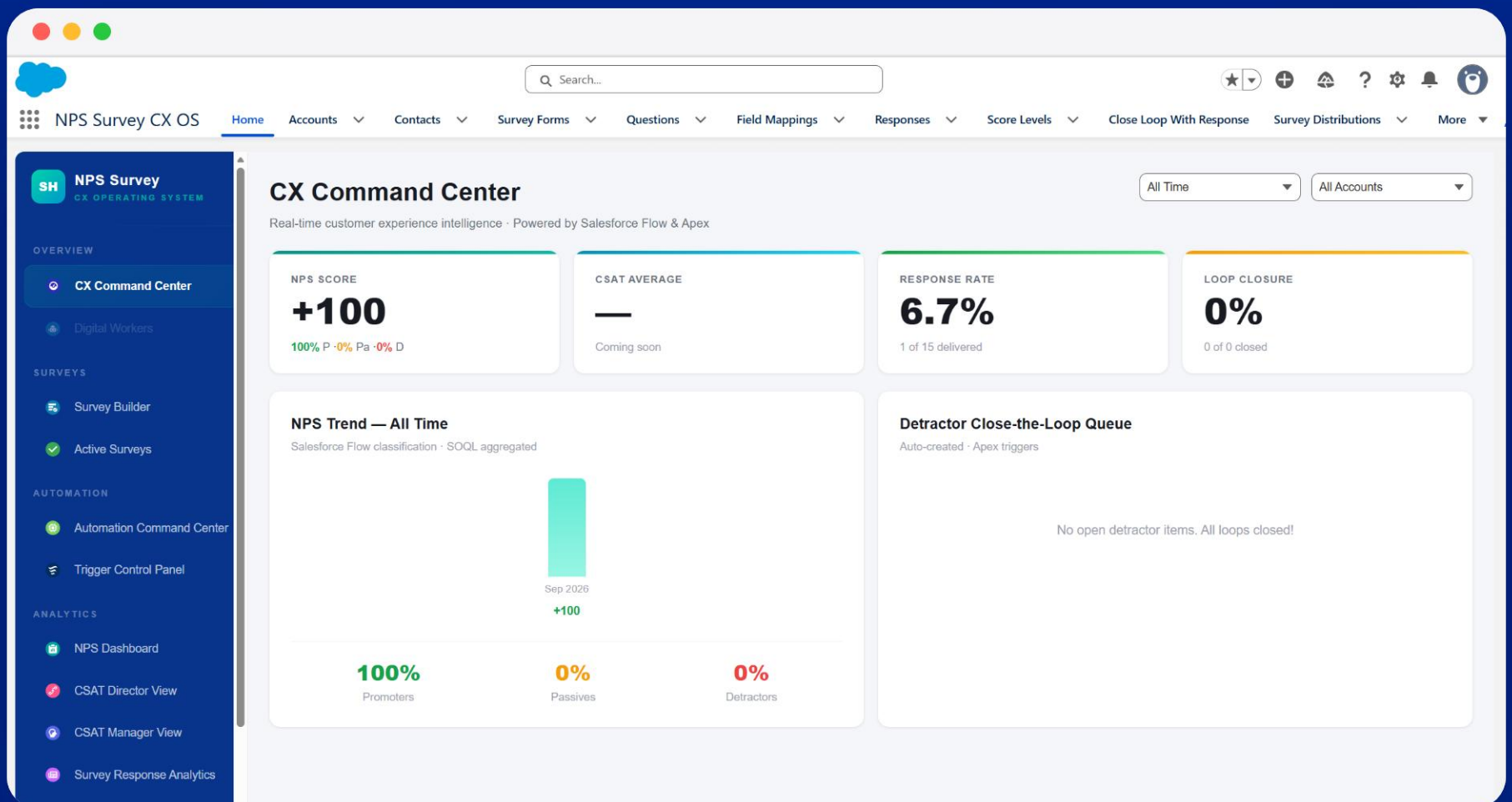


NPS Survey CX OS
by SalesHub

SWIPE · 9 SLIDES

7 surveys every Salesforce org should automate.

The trigger, the question, and who acts on the answer.



Swipe →



SURVEY 1 OF 7 · WHEN

Case closed

Send: CSAT

ASK

"How satisfied were you with how we handled your case?"

Salesforce event



CSAT sent



Service lead



SURVEY 2 OF 7 · WHEN

Onboarding complete

Send: Customer effort

ASK

"How easy was it to get up and running?"

Salesforce event



Customer effort sent



Onboarding / CS



SURVEY 3 OF 7 · WHEN

Opportunity won

Send: Win feedback

ASK

"What tipped your decision in our favour?"

Salesforce event



Win feedback sent



Sales leader



SURVEY 4 OF 7 · WHEN

Opportunity lost

Send: Loss feedback

ASK

"What was the deciding factor?"

Salesforce event



Loss feedback sent



Sales + product



SURVEY 5 OF 7 · WHEN

90 days before renewal

Send: Relationship NPS

ASK

"How likely are you to recommend us?"

Salesforce event



Relationship NPS sent



Account owner



SURVEY 6 OF 7 · WHEN

New contact created

Send: Welcome check-in

ASK

"What would make the first month a success?"

Salesforce event



Welcome check-in sent



CS manager



SURVEY 7 OF 7 · WHEN

Order delivered

Send: Delivery CSAT

ASK

"How satisfied were you with your delivery?"

Salesforce event



Delivery CSAT sent



Operations



NPS Survey CX OS
by SalesHub

Every survey fires itself. Every answer reaches an owner.

The screenshot shows a web browser window with a survey titled "Customer Satisfaction Survey". Below the title is the subtitle "Your feedback helps us improve". The main question is "On a Scale of 0 to 10, how likely are you to recommend (or a specific feature) to a friend or colleague?". Below the question is a horizontal scale of 11 buttons labeled 0 through 10. Below the scale, "Not Satisfied" is written under the 0 and "Very Satisfied" is written under the 10. At the bottom of the survey, it says "Question 1 of 10" and has "Previous" and "Next" buttons.

70+ ready-made forms · AI routes every response · 100% inside Salesforce

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