

SALESFORCE CASE STUDY

Title: Automated CSAT Survey App – Dynamic Customer Satisfaction Surveys on Salesforce

Industry: Cross-Industry (Reusable Managed Package)

Technology/Cloud: Salesforce Sales Cloud, Service Cloud & Experience Cloud



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About the Solution:

Overview:

The Automated CSAT Survey app is a Salesforce managed package built by Dean Infotech that lets any client capture structured customer satisfaction feedback — without a one-off custom build for every org.



Challenge:

- Each new client needed a customized, one-off CSAT survey build, which was slow to deliver and hard to maintain across orgs.
- Feedback had to be triggered dynamically across multiple engagement types — Opportunities, Cases, and Campaigns — each with its own rules.
- Multiple survey types and question sets, tied to service type, record status, and platform, added configuration complexity.
- Manual, hard-coded survey logic was time-consuming, error-prone, and lacked a centralized way to store, report on, and reuse configurations across clients.



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About the Solution:



Solution:

- Rebuilt the static, one-off CSAT process into the Automated CSAT Survey managed package — a single reusable app installable across client orgs.
- Multi-object support for Opportunity, Case, and Campaign, each with independent trigger, send, and reminder logic (Batch_SendDynamicSurveyHandler).
- Custom Survey_Template__c and Question_Bank__c objects let admins build and reuse dynamic question sets and assign them to templates with no code.
- Apex batch classes and email alerts automate sending, with configurable reminder timeframes for surveys left incomplete.
- Company-wide email functionality with a one-click survey button for easy access and completion.



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About the Solution:



Key Features:

- Modern LWC survey forms replace the legacy Visualforce experience, hosted on Experience Cloud for both guest and authenticated respondents.
- Configurable Survey Configuration and Reminder Template LWCs, with an in-app preview so admins see the exact form before it goes out.
- Built-in reporting and dashboards — Sent, Completed, Unsubscribed, and Improvement Feedback — for both Opportunity and Case.
- Guest user access and sharing rules are handled by the package itself, so response capture works reliably outside authenticated Salesforce sessions.



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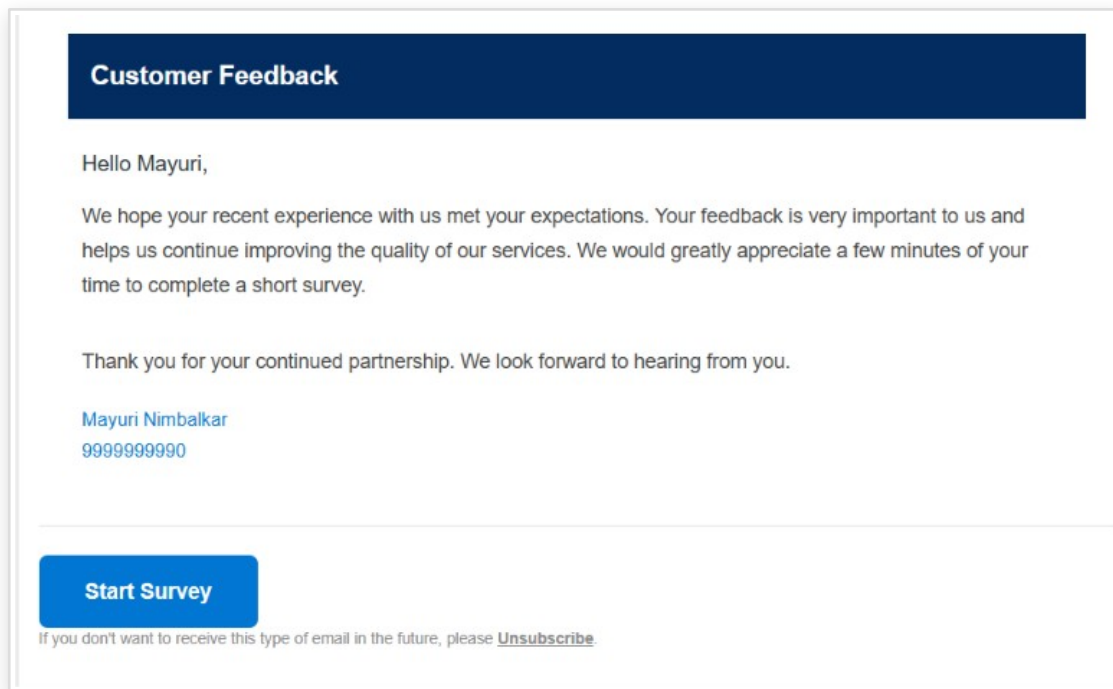


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Survey Email Template:

- Subject line and body copy are merged from the assigned Survey_Template__c — no hardcoding per client.
- Sent via Salesforce company-wide email with a one-click “Start Survey” button.
- Unanswered surveys automatically trigger a reminder email after a configurable timeframe.
- Recipients can opt out at any time; the package tracks unsubscribes per contact.





Survey Response Form:

- Questions and rating scale come from Question_Bank__c records linked to the Survey_Template__c — fully configurable per use case.
- Supports multiple response types out of the box: multiple choice, star rating, and numeric scale.
- Built as a Lightning Web Component on Experience Cloud, so it works for guest and logged-in respondents alike.

How We Can Improve Our Performance?

PLEASE ANSWER EACH QUESTION BELOW

How would you rate the usefulness of the app in your daily activities?

☒ Excellent

☐ Good

☐ Average

☐ Poor

☐ Very Poor

How would you rate your overall experience with the app, considering its features, ease of use, design, performance, navigation, and how well it met your expectations?



Click a star to rate (1 = Poor, 5 = Excellent)

How likely are you to recommend this app to your friends, family, colleagues, or others based on your overall experience?

1

2

3

4

5

6

7

8

9

10

Not at all likely Extremely likely

How easy and convenient was it for you to use the app, including navigating through different screens, finding the information or features you needed, understanding the available options, completing your tasks, and interacting with the overall user interface?

1

2

3

4

5





Survey Response Form:

- Open-text questions capture qualitative feedback alongside the rating questions.
- Required fields are enforced client-side before submission.
- Responses save straight to Survey_Response__c for reporting and the built-in dashboards.

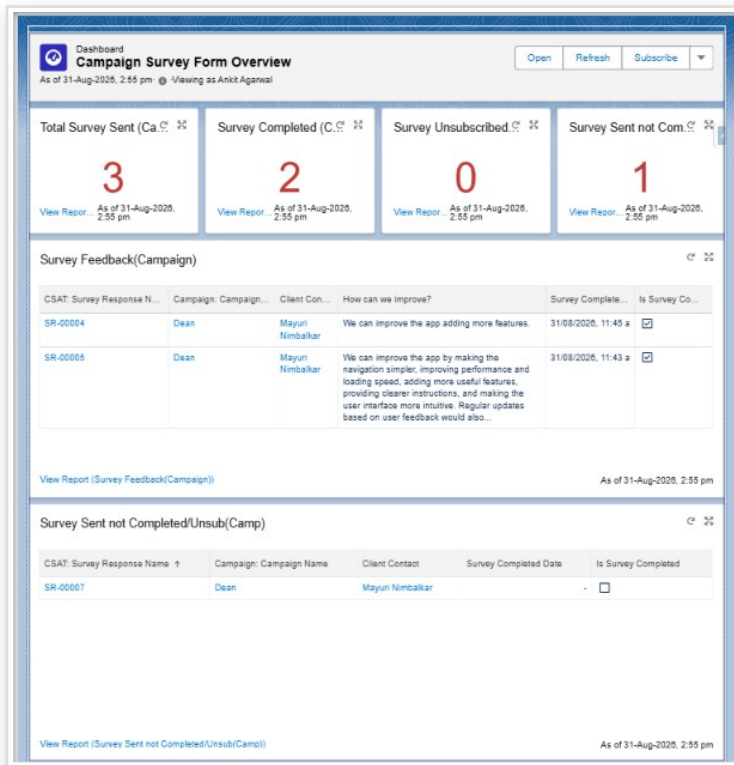
The screenshot displays a survey form with a rating scale at the top consisting of five colored boxes (1 to 5). Box 4 is selected and highlighted with a blue border. Below the scale, the text reads "Not at all satisfied" on the left and "Very satisfied" on the right. The first question is "What did you like most about using the app, and which features, functionalities, design elements, or overall aspects of the app made your experience more useful, convenient, enjoyable, or satisfying?". The answer box contains the text: "I liked the app because it is easy to use, has a simple and intuitive design, provides useful features, and makes it easy to complete tasks quickly and efficiently. The smooth navigation, clear interface, and overall performance made my experience convenient and enjoyable." The second question is "How can we improve? *". The answer box contains the text: "The app is already easy to use and provides a good overall experience. We can make it even better by continuously improving performance, adding useful features, simplifying navigation, and incorporating user feedback to make the experience more convenient and enjoyable." Below the answer boxes, a red asterisk note states "* All fields are required". At the bottom of the form is a blue "Submit Survey" button. The footer of the form indicates it is "Powered by Dean Infotech".





Campaign Survey Dashboard:

Real-time visibility into surveys sent, completed, unsubscribed, and outstanding at the Campaign level.



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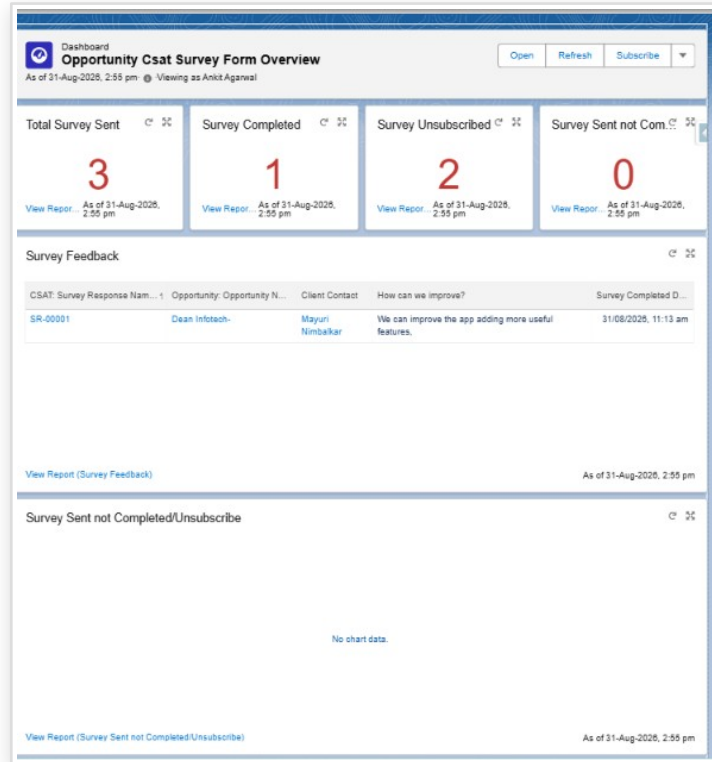


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Opportunity CSAT Survey Dashboard:

Tracks CSAT survey status and feedback tied to each Opportunity, with completion and unsubscribe counts.



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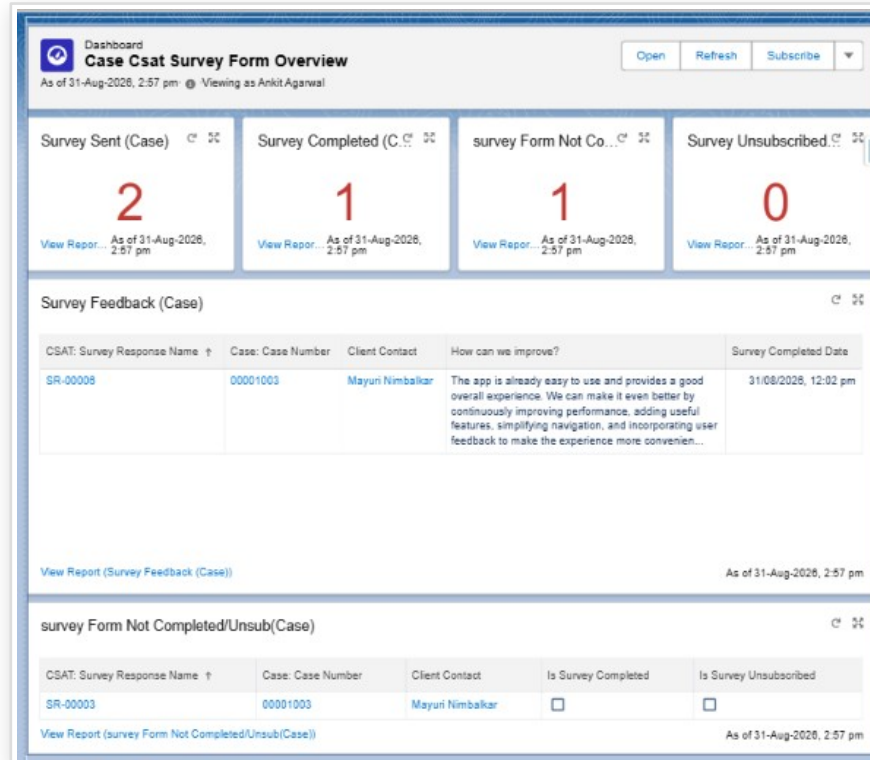


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Case CSAT Survey Dashboard:

Consolidated view of Case-level survey activity, completion status, and client feedback.



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CSAT Survey Overview Form:

Respondents and admins see survey status — Completed, Pending, Unsubscribed — with answers viewable per response.

The screenshot displays a web application interface for managing CSAT surveys. At the top, a navigation bar includes a logo, the text 'Automated CSAT A...', and several menu items: 'Home', 'Survey Templates' (selected), 'Question Banks', and 'Survey Config'. Below the navigation bar, a header section shows a 'Survey Template' icon and the title 'Opportunity when Closed won Mixed Question'. The main content area features a tabbed interface with 'Related', 'Details', 'Overview' (selected), and 'Summary' tabs. Under the 'Overview' tab, there is a section titled 'CSAT Survey Overview' which contains three colored boxes: a green box for '4 COMPLETED', an orange box for '2 PENDING', and a pink box for '2 UNSUBSCRIBED'. Below these boxes, two survey entries are listed. The first entry, 'SR-00006', shows a 'Case: 00001003' and 'Contact: Mayuri Nimbalkar' with a 'View Answers' button. The second entry, 'SR-00005', shows a 'Campaign: Dean' and 'Contact: Mayuri Nimbalkar' with a 'View Answers' button. A vertical sidebar on the right side of the interface contains a search bar, a dropdown menu, and several icons including a mail icon and a chat icon.



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Result:

- One reusable managed package now serves multiple clients, replacing repeated custom builds per org.
- Admins configure new survey templates and question banks without code changes, cutting setup time for new use cases.
- The LWC-based survey experience on Experience Cloud improved usability over the old Visualforce form.
- Automated reminders and centralized reporting give every client visibility into satisfaction trends across Opportunities, Cases, and Campaigns.



Technologies:

- Apex: batch classes, trigger handlers, unit testing
- Lightning Web Components (LWC) on Experience Cloud
- Custom objects: Survey_Template__c, Question_Bank__c, Survey_Response__c
- Salesforce Reports & Dashboards



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THANK YOU



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