



Qualtrics + Salesforce

See how top brands use Qualtrics and Salesforce together

AECOM

By tracking project milestones in Salesforce, AECOM can rely on Qualtrics to send surveys to collect client feedback throughout a project—ultimately ensuring that the project maintains quality and is delivered with a high degree of client satisfaction. Resulting survey responses are mapped to Salesforce for reporting and can automatically trigger new cases when client follow up is required.

“Qualtrics helps us stay on the same page with our clients throughout the entire project. On top of that, their surveys look beautiful on mobile, which is critical for our mobile-centric customers.”

RICHARD SCHWEIN,
DIRECTOR, SALESFORCE COE, VICE PRESIDENT

dun&bradstreet

Dun & Bradstreet uses Salesforce Sales Cloud to track sales, upsell and renewal opportunities. Once those opportunities meet certain criteria in Salesforce, Qualtrics automatically triggers win/loss surveys, upgrade surveys and renewal surveys. Having identified key indicators of loyalty and satisfaction, Dun & Bradstreet also relies on Qualtrics to trigger alerts based on low scores or specific keywords.

“Through Qualtrics we identified key drivers of customer loyalty and satisfaction. We then use that insight in Qualtrics to automatically tune our Voice of the Customer program to listen for those drivers at critical points in the customer journey.”

BIANCA MARTINEZ,
CONSULTANT, CUSTOMER ANALYTICS & INSIGHTS



Using Salesforce's Service Cloud, Grand Pacific Resorts tracks all guest stays using the Opportunity Object. Upon check-out the Opportunity is identified as Closed-Won and Qualtrics deploys a Post Stay survey to the customer. All survey responses are stored on the Person Account within Salesforce for reference and reporting purposes. Low scores on specific questions automatically create a Case on the Person Account to allow for quick follow up and service recovery.

“Guest satisfaction is the leading indicator of repeat business. By giving us an easy way to monitor guest satisfaction, Qualtrics enables us to easily understand the needs of our guests and make changes accordingly.”

**LIZ HUBBARD,
SALESFORCE ADMINISTRATOR
& SR PROJECT SPECIALIST**

Multinational Software Corporation based in California

This company relies on Salesforce and Qualtrics to track customer support calls and follow up on customer issues. Once a customer service rep closes the case in Salesforce Service Cloud, Qualtrics automatically triggers a survey to the customer to ensure the support issue was resolved. If the customer indicates that issue wasn't resolved, a new case is opened in Salesforce and assigned to a manager for follow up.

“By automating follow up and action management for thousands of service questions that come in more than a dozen languages every day, Qualtrics has given us visibility into and control over our customer satisfaction program.”

BUSINESS PROCESS ANALYST



By using Salesforce to track warrior progress across various programs and goals, Wounded Warrior Project® can send customized Qualtrics surveys any time there's a change in a case status. Qualtrics uses embedded fields carried over from Salesforce records to dynamically change the survey experience for each warrior.

“Qualtrics enables us to follow our very personal, one-on-one service model of helping warriors by leveraging all the relevant data we have on a warrior in Salesforce, and then adding to that data by pushing survey responses back to the same record in Salesforce.”

**MICHAEL CALHOUN,
PROGRAM METRICS SPECIALIST**

Multinational Conglomerate based in New York

By relying on Qualtrics and Salesforce's Sales and Service Cloud, this company tracks multiple phases of the customer journey and deploys follow-up surveys at every critical touchpoint. For example, after an order is marked as shipped in Salesforce, surveys are automatically sent seven days, three months, and nine months from ship date to check on delivery, product, and overall satisfaction, respectively.

“We implemented a complex Qualtrics+Salesforce integration with a team of two in only a few weeks. Defining all the business requirements was the hard part of the process; implementing Qualtrics was easy.”

CUSTOMER INSIGHTS MANAGER