



Create and send surveys in Salesforce

SEE RESULTS NEXT TO CRM DATA



qualtrics® + SALESFORCE

Qualify more leads, close more deals, and improve customer satisfaction. The Qualtrics Salesforce integration allows you to automatically send transactional surveys based on Salesforce workflow rules and construct additional rules or cases based on triggers you control.

Create timely and relevant surveys from within Salesforce and distribute them to leads, contacts, and campaign members. Map responses back to any object or field in Salesforce, including Chatter.



Automation

Surveys are sent based on Salesforce workflow rules you create and control



Actionable Insights

Responses are displayed in a Vocalize dashboard contained in Salesforce or alongside your CRM data.



Responsive Design

Surveys are automatically formatted to look great on any device.



Ease of use

Qualtrics can be used during or after any touch point with the customer and workflow rules function with all objects including custom objects.

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WITH QUALTRICS + SALESFORCE NOW YOU CAN

- Create new leads based on survey responses
- Elevate the voice of your customer by posting survey responses, such as NPS scores and feedback, directly to Chatter.
- Trigger surveys based off Salesforce workflow rules
- Create and send surveys to a list of contacts, leads, or campaign members from within Salesforce
- Automatically insert survey responses into any object or field in Salesforce
- See your survey data next to CRM data

5 REASONS CUSTOMERS LOVE QUALTRICS



Easy-to-use products



Single platform for customer, market, and employee insights



Organization-wide collaboration



Best-in-class security



Hands down the best 24/7 customer support in the industry