

Best Practice: How to Build a CRM-Integrated Survey

From the very beginning, Clicktools was designed to centralize feedback in CRM, so that organizations could strategically, systematically act on customer interactions. Today, the solution seamlessly integrates with the major CRM players and gives companies the ability to share valuable data – direct from customers – across marketing, sales, and support functions to improve customer experience.

Sounds like a strong business advantage. But how do we do it?

To improve customer experience and deepen their loyalty to your company, you will need to establish integration between Clicktools and your CRM system. The good news is that with some basic techniques and a little practice, you'll find it quite efficient to synchronize Clicktools data with your CRM.

For greatest success, we advise that you follow these four best practice principles:

- **Enable staff to focus on the added value of understanding and acting on customer feedback by automating routine deployment and reporting.** By creating a regular flow of information, responding to customer needs becomes a regular daily activity.
- **Create true one-to-one relationships by enhancing the single view of the customer with feedback across the customer journey.** By allowing staff to see a 360-degree view of each customer across marketing, sales, and support interactions, they can respond in a more targeted, knowledgeable way.
- **Generate greater insights by integrating different types of data in CRM.** Expand your knowledge of customers by collecting varied feedback types from marketing campaigns and sales scripts to customer satisfaction surveys. The sky's the limit on the types of data you can collect, centralize, and act on.
- **Encourage a “customer first” culture.** By making feedback visible in CRM and building business processes that revolve around customer needs, rather than internal demands, your staff will rally to collectively improve customer experience.

NOTES

You will need CRM System Admin access to complete the CRM activities. All Clicktools' functionality required is out of the box – no bespoke work is needed. Don't have the time to do it? Ask about our Clickstart or Expert on Tap services and let us take the strain.

Building a CRM-Integrated Survey: Activity List

The following is a list of activities typically involved in integrating Clicktools content with your CRM system. For surveys, it assumes that results are stored in a custom object to enable CRM-based reporting and enable a single view of the customer.

Please note that not all of these activities are required. For example, if you intend to do reporting in CRM, then you can omit the activities relating to Clicktools Analytics.

A typical project takes one-two weeks to complete, so plan accordingly. Of course, more complex content and reporting may take longer. Also, you will need CRM System Admin access to complete the CRM activities. But, all Clicktools functionality required is out of the box – no custom work needed.

DESIGN

- Storyboard reporting requirements
- Storyboard surveys and deployment process
- Define questions
- Define alert structures
- Design CRM changes (objects and fields)
- Design deployment process
- Design form/survey to CRM content mapping

BUILD

- Build survey/form/script
- Build branching
- Build question groups
(for Clicktools Analytics reporting)
- Build deployment workflow/reports and schedules
- Build branded survey presentation template
- Build notification alerts
- Test alerts *(internal contacts)*
- Build Clicktools – CRM mapping
- For Clicktools-based reporting
 - Build Clicktools reports *(if using Clicktools Analytics)*
 - Create Clicktools Analytics charts and dashboards
- For CRM-based reporting
 - Build CRM reports
 - Construct CRM dashboards
- Test dashboards
- Test full system

Want Some Help?

If this seems a bit daunting or you simply don't have time to do it yourself, please contact us regarding our Clickstart or Expert on Tap programs. We offer an array of professional services to help you get the most out of Clicktools and CRM, and would be more than happy to assist in integrating the two systems.

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