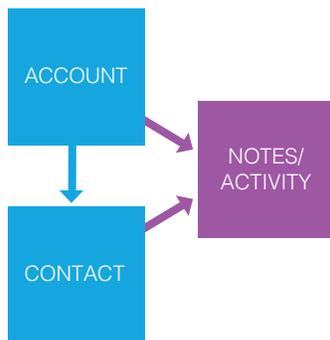


# How to Store Survey Responses in CRM

Our customers often ask us how to store survey responses in CRM. What are the options and best practices? Of course, each organization is different, but this document will introduce the various approaches available to you.

There are four approaches to storing feedback, each of which has its advantages and disadvantages:

- OPTION 1:** Use standard fields & objects.
- OPTION 2:** Add custom fields to standard objects.
- OPTION 3:** Create a shared custom object.
- OPTION 4:** Create cascading custom objects.



## Option 1: Use Standard Fields & Objects

Some organizations will be limited in how they can customize CRM because they aren't allowed to add custom fields or objects or, alternatively, their allowance may already be used. In this case, there is little choice except to use standard fields and objects to store survey responses.

There are not many ways of using standard fields on Accounts and Contacts, so if you choose this approach, you'll want to use Notes and Tasks/Activities.

### Word to the Wise: Consult Your CRM Admin

How you decide to store survey responses ultimately depends upon which CRM solution you use, as well as your Clicktools edition. It will also depend on what information you want people to see.

Be sure to talk to your CRM Admin or System Architect, who will know exactly what you will or won't be able to do. S/he may also be happy to talk to you for hours about Mr. Codd and Third Normal Form (TNF) upon which a lot of data storage theory is based in CRM. (Yes, there are actually people who do this for a living)!

On the plus side, these are usually readily available against all other information in your CRM (e.g. Account, Contact, Opportunity, Case, etc.), which means they can be used to store responses for all sorts of feedback. You may want also to consider adding an Activity Type to indicate a survey response, however, the downside (and it's HUGE) is that using purely standard fields and objects severely limits reporting.

Reporting is challenging for several reasons. Firstly, you can usually only connect these items to one other piece of information (e.g. an Account or a Contact, not both) and there is no way to report across items that are linked to different things. Second, there is limited ability (if any) to cater to different types of question responses (e.g. scales, choices, text) as everything gets placed into one field (i.e. you put responses to all the questions into one Note or Activity) or you create multiple records (one per question response).

In the first case, reporting is very complicated (practically impossible) because all you have is all your responses in a large text field or, in the second case, you will likely be creating hundreds and hundreds of Activity records and scoring overall responses will be very complicated (again practically impossible) to effectively report.

Putting survey responses into CRM is only useful if a) people can see the information and b) the information is used to actively drive improvement and change (at an operational or organizational level). Using purely standard fields and objects severely limits an organization's ability to do this. One way of using this standard approach is to customize, which segues nicely to the next option.

Standard Fields & Objects	
<b>Advantages</b>	Already built and in your CRM
<b>Disadvantages</b>	Reporting challenges
<b>Best for</b>	When you have no other option, it's better than nothing.

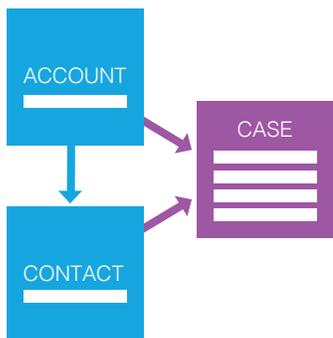
## Option 2: Add Custom Fields to Standard Objects

The second approach is a progression from option one. If you cannot add, or have reached your limit of, custom objects then you may want to consider adding custom fields to one or more standard objects.

This approach opens up a range of options including adding custom fields to Tasks/Activities, but also extending other objects such as Account, Contact, and Case. Please be aware that you typically can't add custom fields to Note type records.

This approach can ease some of the reporting challenges and is easy to explain to lots of users. It also, arguably, puts the survey responses at the heart of your CRM.

As an example, you could extend the Case object to store responses to questions in a closed case survey. Standard reporting would be available as per standard



Case reports and people would see responses in the Case record itself.

One good example of this type of customization is storing summary response data. For example, you may want to store the details of the last survey a contact completed, what type of survey it was and whether they were happy or not. You could also store a link to the survey response so people do not have to navigate to other information to see important information.

One downside of this approach can be a large number of "dead" fields. These are fields that will be included for every record but will have no information completed. From a data-modeling perspective, this isn't the most efficient method of storing survey responses. So, continuing our Case example, unless someone completed a response for every case, you will have lots of empty fields on each Case record.

In addition, this approach should not be used when more than one response (from one or more people) is captured. So, if a Closed Case survey is going to be completed by more than one person, then you will only be able to store one response against the Case. In most scenarios, you are fine with this approach on Cases (as Cases are typically linked to only one person). However, this is more likely to be a limiting factor in storing responses against the Account and Contact record.

For example, if you use Net Promoter™, storing responses at the Account or Contact level will not work. Why? It's simply because you are likely to have more than one contact in an Account complete the survey. Storing responses at the Contact level will not work because you would want to store multiple responses to the same survey over time to compare responses from month to month or year to year.

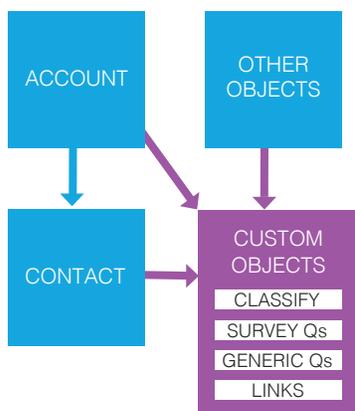
The second major limitation of this approach is if you use the same question across multiple surveys (e.g. Net Promoter question in multiple surveys), you will only be able to report effectively by using one dedicated object to store responses.

Custom Fields within Standard Objects	
<b>Advantages</b>	Easily incorporated into standard page layout. Potentially easier adoption. Removes some reporting challenges.
<b>Disadvantages</b>	Difficult to track multiple responses over time. "Dead" data in every object. Doesn't work if the same question is used in multiple surveys.
<b>Best for</b>	Storing summary response details (e.g. what, when) against Leads/Contacts etc. Specific and consistent feedback on a specific subject with no duplication across different subjects.

## Option 3: Create a Shared Custom Object(s)

The third approach involves the use of custom objects. This option can be used in conjunction with Option 4 (Cascading), depending on the type of surveys you collect responses to and the maturity/stability of your approach.

This approach means creating a generic Surveys or Feedback object and putting responses to all Surveys into this object. This is the approach used in the "Report Card" customization that you may have seen in a Clicktools demo (and is available as an AppExchange™ extension for Salesforce® users).



When building an object of this type, it will typically consist of four areas:

- 1. Classification fields:** These fields will enable you to capture and report on different types of surveys.
- 2. Survey-specific question fields:** There will be specific fields for each question in each survey you store. For example, if you collect responses from win/loss and closed case surveys, then survey-specific fields will be used to capture answers to survey-specific questions.
- 3. Survey-generic question fields:** These fields will be used to store answers to questions that are repeated in each survey (e.g. a Net Promoter question).
- 4. Linkage fields:** These fields are used to link the survey response to one or more other pieces of information such as Account, Contact, Case, Opportunity, Lead, Campaign, etc.

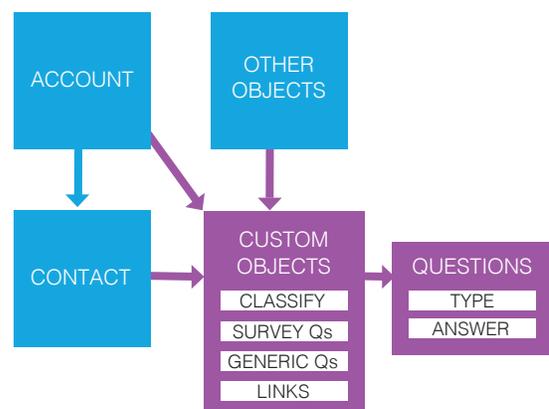
Custom Objects	
<b>Advantages</b>	Minimizes the number of custom objects. Easy to see complete survey responses. Easy to report in and across surveys. Minimal mapping and maintenance within Clicktools.
<b>Disadvantages</b>	Requires most thought upfront. Can lead to confused page layouts and dead fields. More work to add surveys from a CRM perspective.
<b>Best for</b>	Stable and static touch-points or method surveys (e.g. Net Promoter™)

## Option 4: Use Standard Fields & Objects

This approach requires the use of two (or more) custom objects – one to store the Survey responded to and one to store Question responses. As mentioned above, it may be worth using a combination of Option 3 and Option 4, in some cases.

The Survey object will be used to store the name, type of survey, and perhaps answers to questions that are repeated across the whole survey (one survey object per survey response). The Question object will be used to store individual question responses (one record per question response).

The Question object will be generic in nature as it needs to store responses to any question that could be asked in a survey. That means it will need to include fields for question type and potentially multiple fields (e.g. a numeric field to score numeric scale answers and text field for picklists).



At the start of the document, we referred to Mr.Codd and Third Normal Form. Quickly, in case you're unfamiliar with the reference: Edgar Frank Codd (August 23, 1923 – April 18, 2003) was an English computer scientist who invented the relational model for database management, the theoretical basis for relational databases. The Third Normal Form (3NF), originally defined by Codd in 1971, is a normal form used in database normalization.

In purest terms, the cascading approach is the closest to that model. In its purest form, you may consider a three-level model, one for Surveys, one for Questions, and one for Responses.

Cascading Objects	
<b>Advantages</b>	Flexible approach for all surveys and question types. Minimizes dead data. Reduced CRM overhead.
<b>Disadvantages</b>	Challenging reporting in some CRM. Larger overhead in terms of Clicktools mapping.
<b>Best for</b>	Capturing ad-hoc/dynamic surveys.

While this cascading structure gives the most efficient and flexible approach from a data modeling perspective, the realities of many CRMs (which are no more than "viewers" onto a relational database) means that this approach can have challenges, especially around reporting.

For example, building a report that contains count/mean/summary scores to each question in a survey is a lot more complex in the cascading approach than in the dedicated object approach.

This also requires a more complex mapping from Clicktools. While this shouldn't ultimately determine your choice, the overall implementation/management overhead should be considered. For this reason, in

most case the three-level cascading model goes a step too far.

There is an upside to this approach, however. From a maintenance perspective (certainly with a two-level model), once this approach has been defined, survey results can be more easily added to CRM. There is no need to add or change any CRM information as the mapping simply needs to create new survey and question records.

The cascading object approach requires that you map the question text and create a Question object for each question answered. Therefore, if you have a 20 question survey, then you will need to create 21 mapping sections in Clicktools (one for the survey and 20 for the questions) and each mapping section will require mapping four or five fields per question. Compare this to using the shared object approach, which requires only one mapping section with one mapping per question.

Each of the four approaches has its place and it is possible that you may want to use more than one in your solution. For example, you could use custom fields on standard objects to store summary details and cascading custom objects for the detail.

In isolation, the first two options are limiting, but if CRM customization is limited they can still provide a useful storage and viewer on customer feedback. The recommended choice is to go for one of the custom object options. If an organization is serious about bringing the customer's voice into CRM, then these approaches maximize an organization's ability to view and use the surveys to drive organizational improvement – the whole point of collecting the responses in the first place.

## ABOUT CLICKTOOLS

Clicktools solutions help organizations transform customer experience to consistently drive improvements and profits. The company's flagship software, Clicktools, enables companies to collect, centralize, and act on customer feedback using surveys, call scripts, and web forms that integrate with CRM. The company is headquartered in Poole, England, UK with US offices in Phoenix, Arizona. Clicktools is owned by Callidus Software Inc. (NASDAQ: CALD), which operates as CallidusCloud®, the leading provider of sales and marketing effectiveness software.

Contact us today  
for a FREE demo.

US: +1-800-774-4065 | UK: +44 0800 0432587  
sales@clicktools.com | www.clicktools.com

