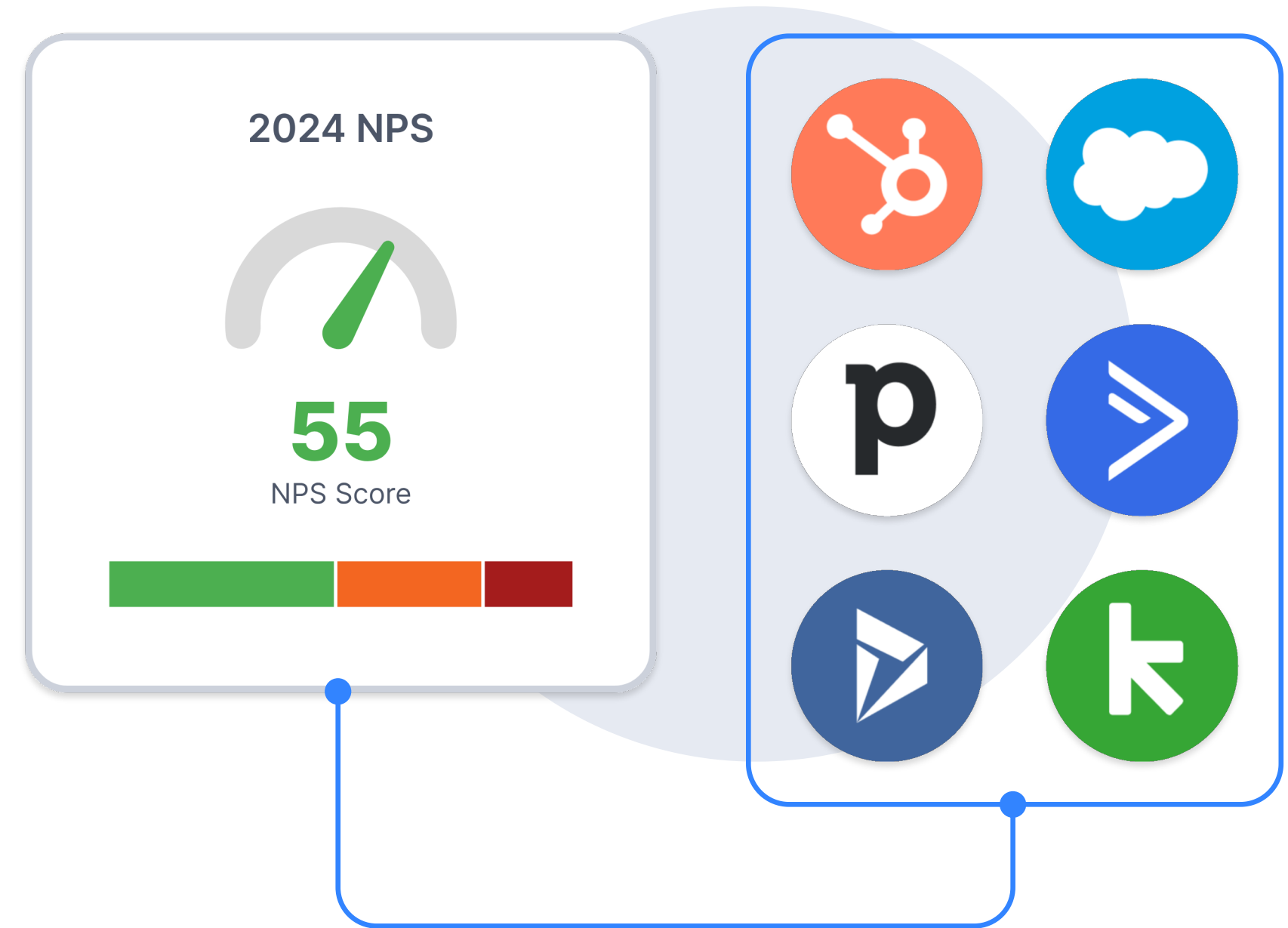




Maximising CRM Efficiency

Automating Process with SmartSurvey Integrations



Let's explore integration and automation!

SmartSurvey offers over 300 integrations. In this guide we are looking specifically at customer relationship management (CRM) systems and how you can automate processes and streamline workflows from response data. This guide provides five practical examples of how to use that data – aligned with specific teams and automation flows – to drive meaningful actions, streamline operations, and improve customer experience and engagement.

Example 1

Automating customer reviews with NPS (Marketing Team)

Use Case

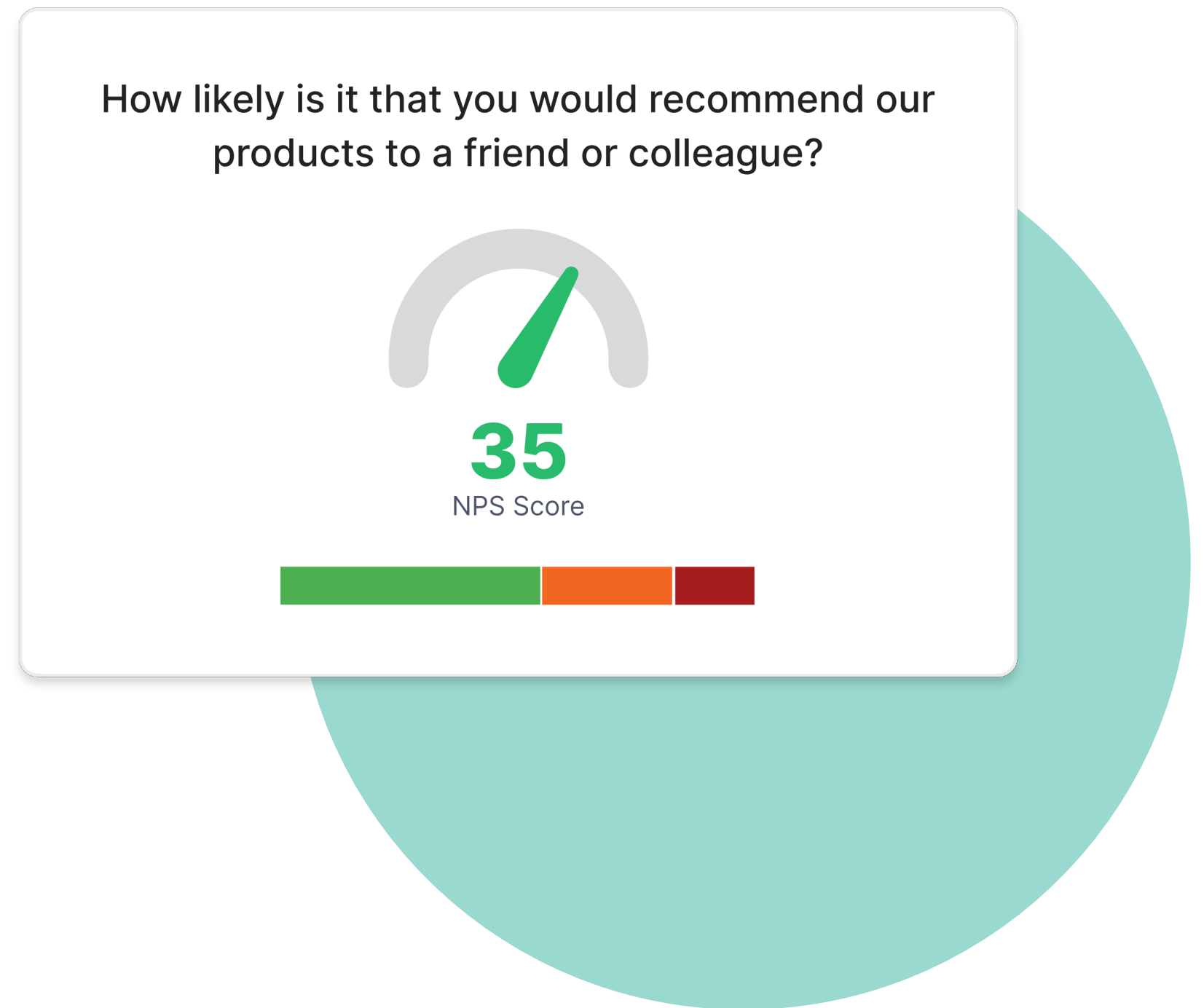
After an NPS (Net Promoter Score) survey is completed, responses are automatically synced with your CRM. Respondents who score 9 or 10 are automatically added to a dynamic list called 'Promoters'.

Outcome

The marketing team have a segmented list of who they can target for any number of different campaigns from testimonials and case studies to new product testing and referrals.

Automate

A workflow is triggered in the CRM that sends an automated email campaign, asking for reviews, referencing the feedback score and why they gave the score they did (populated from response data now pushed into the CRM). The entire review process is streamlined, personalised with feedback and reviews are only requested from promoters likely to provide high ratings.



Example 2

Enhancing post-purchase experience from CSAT scores (Support Team)

Use Case

A Customer Satisfaction (CSAT) survey is sent after a customer completes a purchase. High CSAT scores are automatically passed to the CRM, where they trigger actions for the support team.

Outcome

The Support team can capitalise on high satisfaction by offering personalised post-purchase support, such as setting up a consultation for product use, working with the marketing team to provide exclusive tips, or offer a discount on future purchases to encourage repeat business.

Automate

High CSAT scores automatically add customers to a "Post-Purchase Engagement" segment. The CRM triggers an automated workflow that sends a personalised follow-up email offering additional support or an exclusive discount on their next purchase, strengthening customer loyalty and encouraging repeat business.



Example 3

Reducing churn with CES (Customer Retention Team)

Use Case

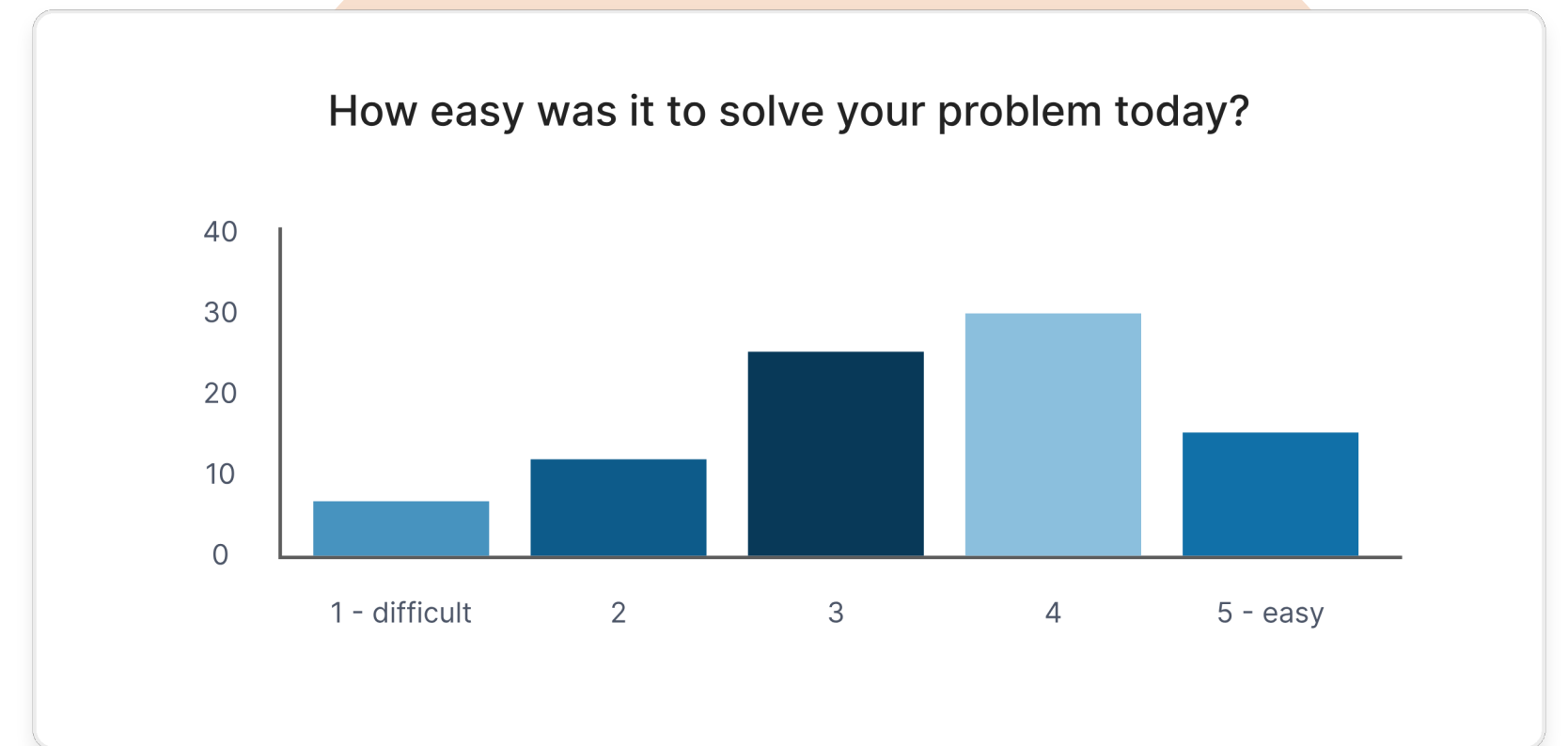
Customer Effort Score (CES) surveys measure how easy it is for customers to resolve issues or complete actions. High effort scores indicate a challenging experience, automatically flagging these customers for follow-up actions by the customer retention team.

Outcome

By identifying customers who experienced difficulties, the retention team can reach out proactively to address concerns, offer assistance, or provide incentives to reduce the likelihood of churn.

Automate

Customers with high CES scores are automatically added to a "High Risk of Churn" list. The CRM triggers an alert to the retention team, who then follow up with personalised outreach to resolve any issues and retain the customer.



Example 4

Improving products with sentiment analysis (Product Team)

Use Case

Sentiment analysis on open-ended survey responses gauges customer feelings about your products or services. This analysis is automatically fed into your CRM, where the product team track trends.

Outcome

The product team can quickly identify areas needing improvement and prioritise product updates or feature enhancements based on real-time customer sentiment.

Automate

Negative sentiment triggers automatic alerts to the product team which are sent to the product team via Slack. The CRM creates tasks for the team to investigate and address specific concerns, streamlining product improvement efforts.

How would you compare our products to others you have used? ...

226	😊	✓	Very quick to set up and easy to learn all the functions. Will not be going back to my old products!	30/04/2023 16:50 PM
225	😐	✓	About the same. There is not much difference in products for me because I only use them occasionally.	30/04/2023 16:50 PM
224	😊	✓	love how easy it is to use!	30/04/2023 16:50 PM
223	😡	✓	I find it confusing compared to the ones I have used before.	30/04/2023 16:50 PM
222	😊	✓	I find all of the products very useful and much simpler than the ones I have used in the past	30/04/2023 16:50 PM

Example 5

Creating a referral segment with top CSAT and NPS Scores (Sales Team)

Use Case

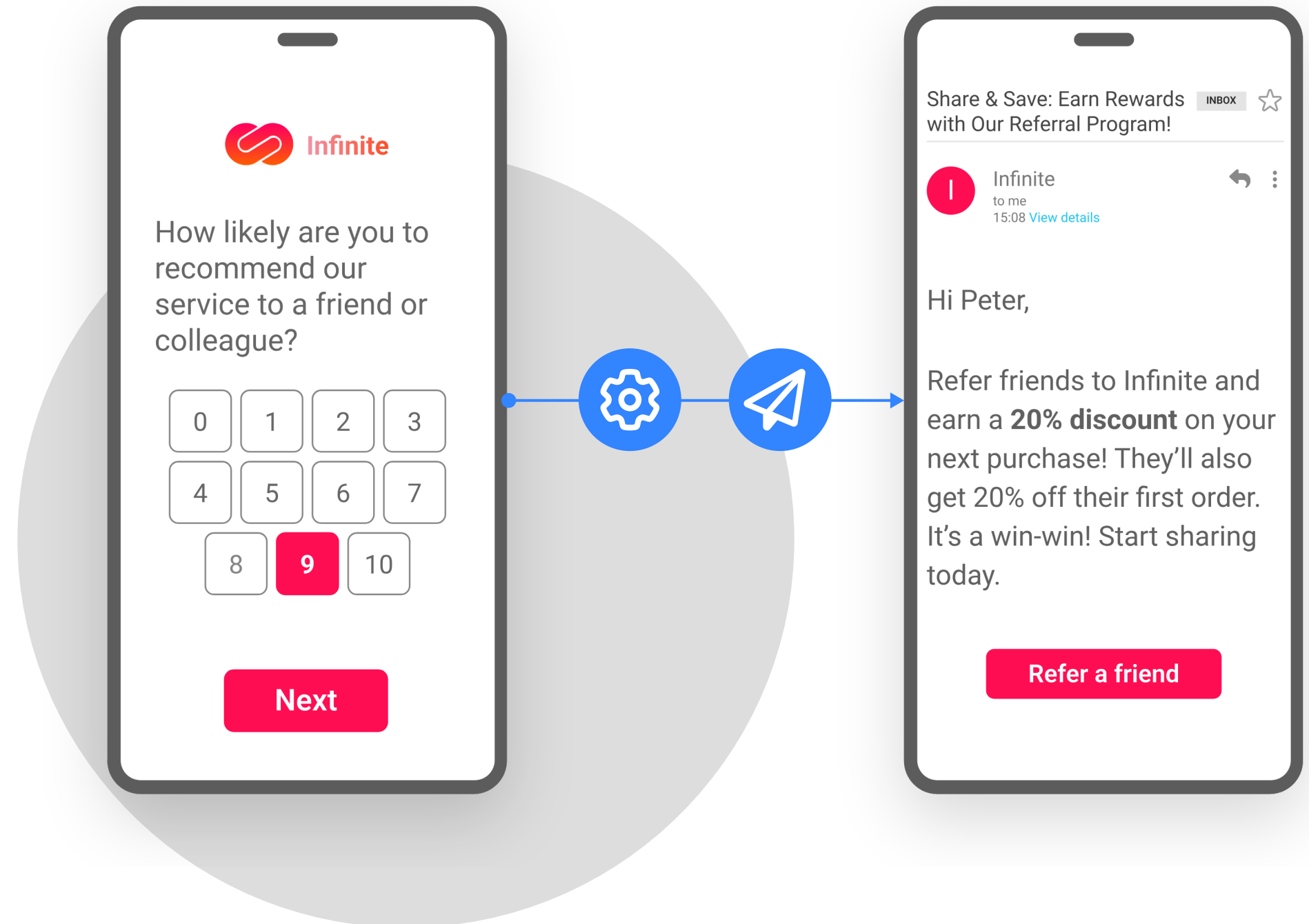
Customers who score highly on NPS surveys are automatically identified as brand advocates. The CRM segments these customers for referral requests handled by the sales team.

Outcome

The sales team can leverage these loyal customers by asking for referrals, expanding the customer base through trusted recommendations.

Automate

High NPS scores trigger the addition of customers to a "Referral Request" list. The CRM then automatically sends a referral request email from the Sales team automating the referral outreach process.



Best Practices for CRM Integration

- 1 Ensure Data Accuracy:** Run a test to verify that survey responses are accurately mapped to the correct fields in your CRM system
- 2 Leverage Automation:** Use your CRM's automation tools to trigger personalised actions based on survey responses, such as follow-up emails, task creation, list building or future segmentation criteria.
- 3 Protect Customer Privacy:** Implement robust data protection measures to ensure all customer information collected via surveys is securely stored and compliant with GDPR.
- 4 Analyse and Act on Feedback:** Regularly review survey insights to inform decisions about product development, customer service improvements, and marketing strategies.
- 5 Update Your Teams:** Ensure your teams understand and effectively use survey data to make informed decisions and engage with customers personally and effectively.

Conclusion

Integrating SmartSurvey with your CRM system is a powerful way to automate and streamline processes across multiple teams reducing resource and time to drive actions and achieve outcomes simultaneously.



Let's Get Your Surveys Working Smarter

Explore our integrations directory or get in touch with our team to discuss your specific integration needs. Don't see your platform listed? No problem – we can create a custom integration tailored to your requirements. Let's unlock the full potential of your surveys and transform the way you collect and act on feedback.

Talk to Us

Explore integrations