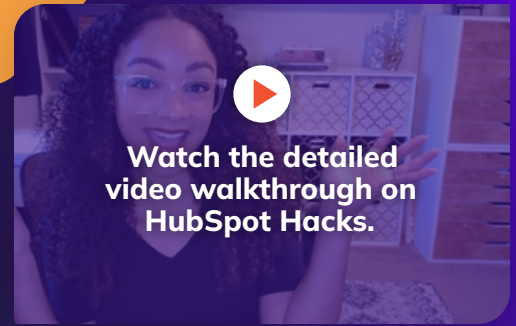


# Feedback Survey Follow Up



## You will need:

- Feedback Surveys established

### ▶ Trigger

**Type:** Record meets a set of filter conditions

**Object Type:** Survey Response

**Conditions:** Survey type is NPS + any additional criteria to filter by (Ex. Recently became Customer, Service type, Recent Renewal, etc)

**Re-enrollment:** Off

**Type:** Edit record

**Options:** Copy the Contact Owner property from the Contact to the Survey Response

**Type:** Branch based on Sentiment

**Detractor**

**Type:** Send Internal email – ALERT: NPS Detractor

**Options:** Send to Owner and designated Manager or Management Team

**Type:** Create task

**Options:** Task Title- NPS Detractor- Send Follow-up email

### Tip:

Recommended to include a link to an appropriate email template to use.



**Neutral**

**Type:** Send email

**Options:** Additional Feedback Request

**Type:** Create task

**Options:** Review Account and develop action plan

### Tip:

Here is a great place for coaching your team on how to maximize Client relationships by developing action plans to improve customer sentiment.



**Promoter**

**Type:** Send email

**Options:** Review request

**Type:** Edit record

**Options:** Contact Set Lifecycle stage to Evangelist

### Tip:

This a great way to get social proof from happy customers by gaining reviews and testimonials that you can use in your marketing.

