



# Creating Feedback Loops Throughout the Customer Journey

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# **Creating Feedback Loops Throughout the Customer Journey**

# Agenda

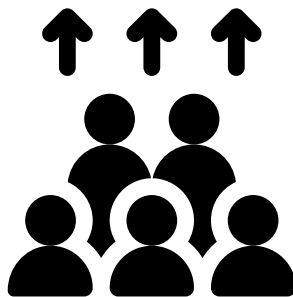


- Problem vs goal
- Automation rules and email templates
- Creating integrated feedback surveys
- Syncing back to Salesforce
- Complete the loop!

# Where we were

So much work  
(for multiple brands!)

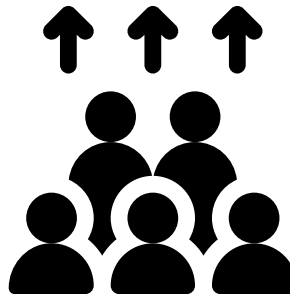
- Once a year
- Lists
- Upload
- Distribute
- Spreadsheets



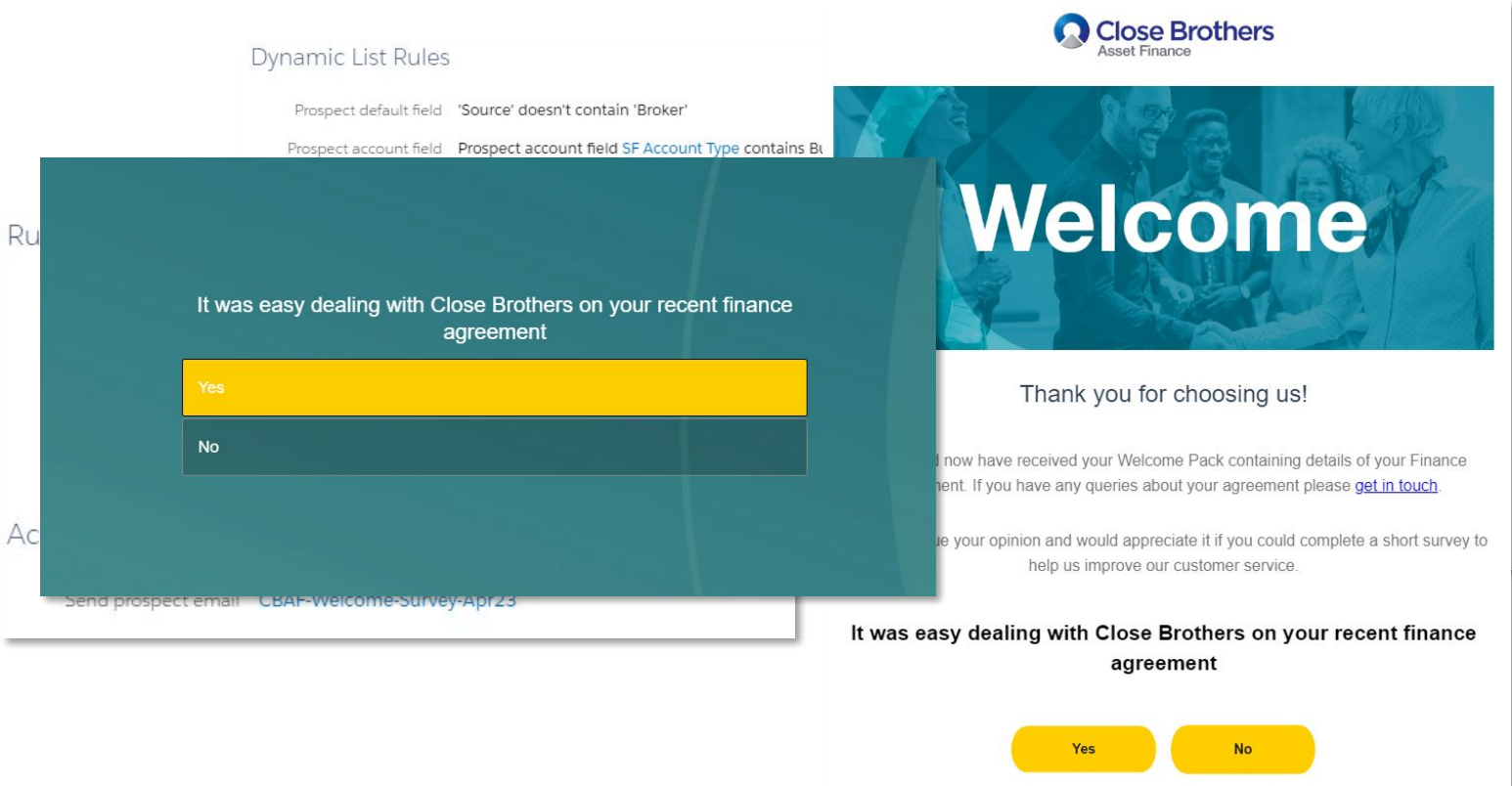
# Where we wanted to be

## Automate the work!

- Ongoing
- Dynamic lists
- Timed surveys
- Salesforce integration
- Dashboards



# Automation Rules - Welcome



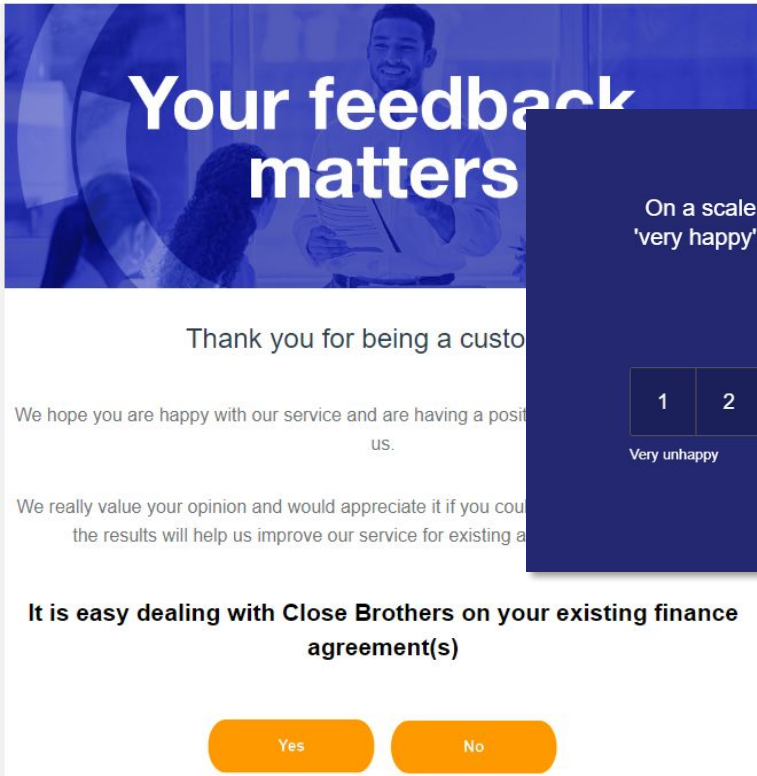
The image displays a screenshot of an automation rules interface for Close Brothers Asset Finance. The interface shows a 'Dynamic List Rules' section with two rules defined:

- Prospect default field 'Source' doesn't contain 'Broker'
- Prospect account field Prospect account field SF Account Type contains B...

Below the rules, a preview of an email template is shown. The email header features the Close Brothers Asset Finance logo and a large 'Welcome' message over a background image of a group of people. The main body of the email includes a survey question: 'It was easy dealing with Close Brothers on your recent finance agreement'. The survey has two options: 'Yes' (highlighted in yellow) and 'No'. The email concludes with a thank you message and a link to 'get in touch' for any queries.

Send prospect email: CBAF-welcome-survey-Apr23

# Automation Rules – In-Life

A survey banner with a blue background and a photo of a smiling man. The text 'Your feedback matters' is prominently displayed in white. Below the banner, there is a white box containing a thank you message and a question about the ease of dealing with Close Brothers on an existing finance agreement. At the bottom of the white box are two orange buttons labeled 'Yes' and 'No'.

**Your feedback matters**

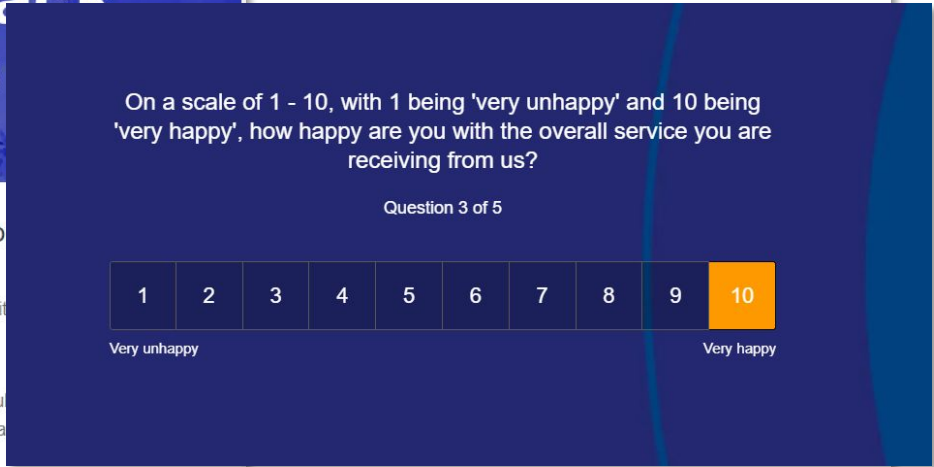
Thank you for being a customer.

We hope you are happy with our service and are having a positive experience with us.

We really value your opinion and would appreciate it if you could provide feedback. The results will help us improve our service for existing and future customers.

**It is easy dealing with Close Brothers on your existing finance agreement(s)**

Yes No

A dark blue overlay box containing a survey question and a rating scale. The question asks for a rating from 1 to 10, where 1 is 'very unhappy' and 10 is 'very happy'. The rating scale shows numbers 1 through 10, with the number 10 highlighted in orange. The text 'Question 3 of 5' is centered above the scale.

On a scale of 1 - 10, with 1 being 'very unhappy' and 10 being 'very happy', how happy are you with the overall service you are receiving from us?

Question 3 of 5

1 2 3 4 5 6 7 8 9 10

Very unhappy Very happy

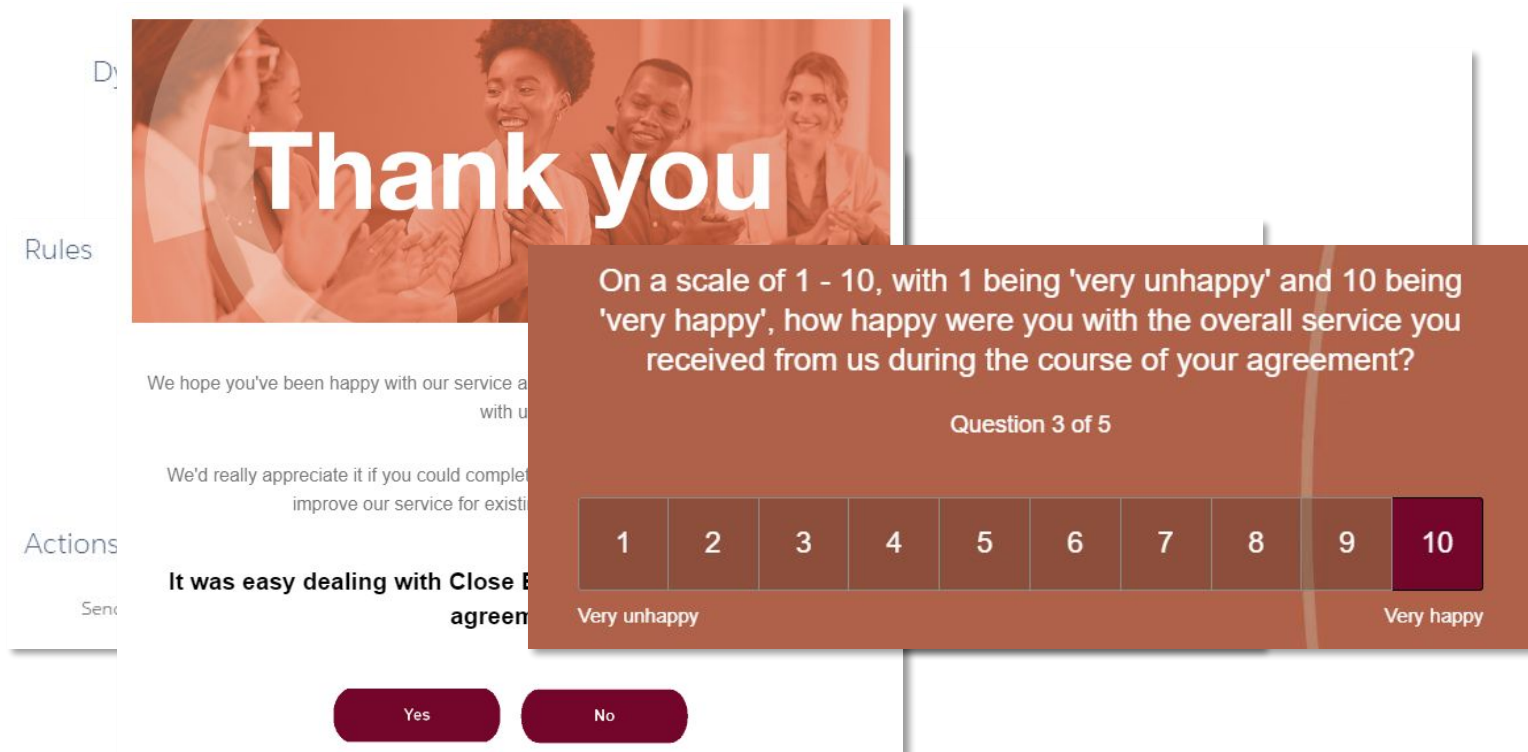
Survey-Apr23

Broker





# Automation Rules – End of Life



The screenshot shows a configuration interface for an automation rule. At the top, there is a header image with the text "Thank you" overlaid. Below this, the "Rules" section contains a message: "We hope you've been happy with our service and with us. We'd really appreciate it if you could complete this survey to help us improve our service for existing customers." The "Actions" section includes the text "It was easy dealing with Close & Renew agreement" and a "Send" button. A large, semi-transparent overlay is positioned over the right side of the interface, containing a survey question: "On a scale of 1 - 10, with 1 being 'very unhappy' and 10 being 'very happy', how happy were you with the overall service you received from us during the course of your agreement?" Below the question is a horizontal scale from 1 to 10, with the number 10 highlighted in a darker shade. The scale is labeled "Question 3 of 5" at the top. At the bottom of the overlay, the text "Very unhappy" is on the left and "Very happy" is on the right. At the bottom of the main interface, there are two buttons labeled "Yes" and "No".

Thank you

Rules

We hope you've been happy with our service and with us.

We'd really appreciate it if you could complete this survey to help us improve our service for existing customers.

Actions

It was easy dealing with Close & Renew agreement

Send

On a scale of 1 - 10, with 1 being 'very unhappy' and 10 being 'very happy', how happy were you with the overall service you received from us during the course of your agreement?

Question 3 of 5

1 2 3 4 5 6 7 8 9 10


Very unhappy Very happy

Yes No

# Creating Integrated GetFeedback Surveys

**Create Your Own Theme**

Background Image



Font

Helvetica

Colors

Question text

Answer text

Button background

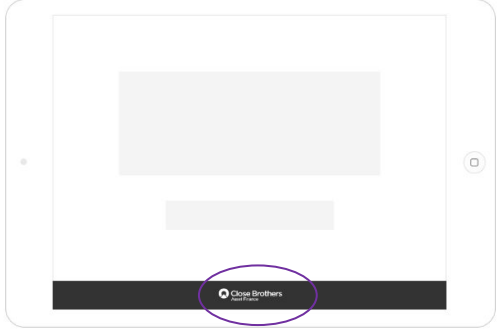
Survey background

It was easy dealing with Close Brothers on your recent finance agreement

Yes

No

**Whitelabeling**



Remove or replace the GetFeedback logo. [Learn more.](#)

# Creating Integrated GetFeedback Surveys

My surveys / CBAF-Welcome Survey-0523

 DRAFT

Push draft

```
https://www.getfeedback.com/r/RlzZ1ICp?recipient_email={{Recipient.Email}}
&contact_id={{Recipient.ID}}&gf_q%5B12405873%5D=23745065
```

Sync to Salesforce using Managed Mappings:

# Survey Response Sync in Salesforce

Activity **Chatter**

Post

Share an update... Share

Contact **Juliet Stephenson**

Contact Owner: Darshna Devi | Phone (2) | Email: juliet.stephenson@closebrothers.com | Primary Address: United Kingdom

Related List Quick Links: Opportunities (0), Related Accounts (1), Notes (0), Contact History (1), Campaign History (0), Opportunity Securities (0), Third Party References (0), Files (0), Cases (0), Responses (10+)

**Responses**

10+ Items • Sorted by Completion Date • Updated a few seconds ago

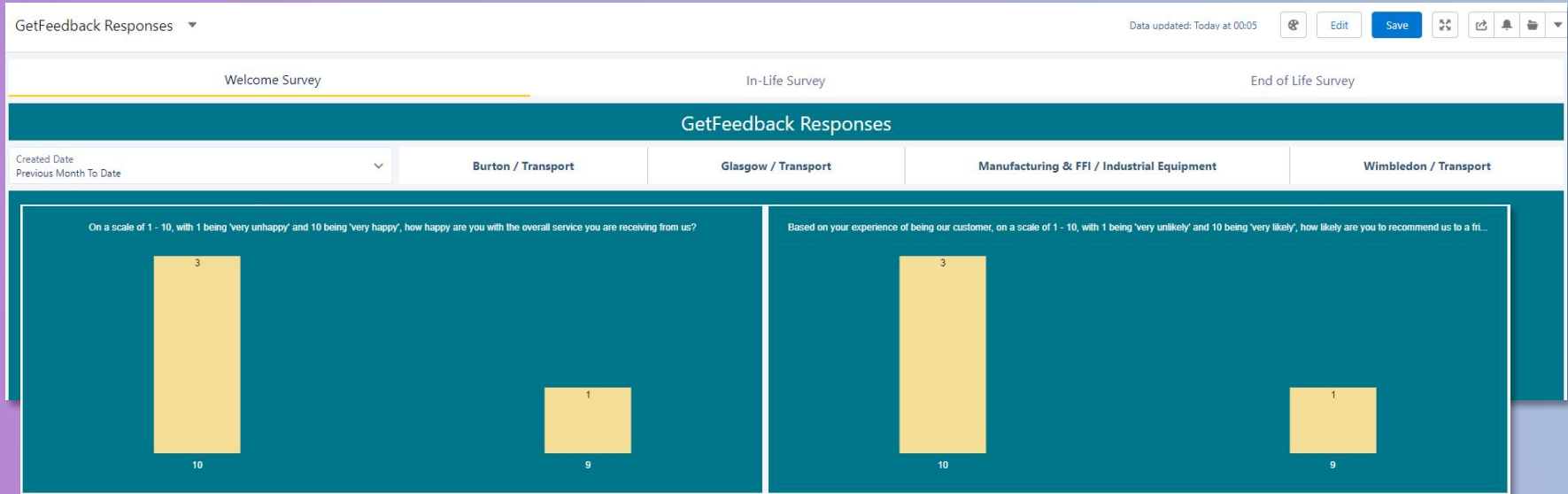
Response Name	Survey	Uri	Completion Date ↑
1 0156	CBAF-Welcome Survey-0423	<a href="https://www.getfeedback.com/v/t6KMNgL659UanCdLVGchWQ">https://www.getfeedback.com/v/t6KMNgL659UanCdLVGchWQ</a>	24/02/2023 11:41

It was easy dealing with Close Brothers on your recent finance agreement

Yes

No

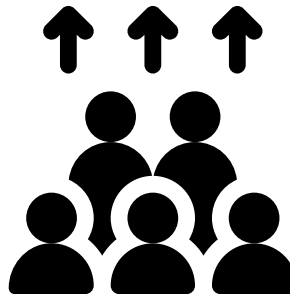
# Reporting with Analytics Studio



# Where we ~~wanted to be~~ are

## Automated the work!

- Ongoing
- Dynamic lists
- Timed surveys
- Salesforce integration
- Dashboards



# Our Feedback Loop

Identify



Survey



Report



# Thank You!

[linkedin.com/juliet.stephenson](https://www.linkedin.com/juliet.stephenson)

