Tactical RevOps

Project Profile

Hearing What Matters: Creating a Voice of Customer Program

A Salesforce + Qualtrics Solution

Overview

A B2B services company needed a scalable way to capture feedback from prospects and clients across the full customer journey. Before this project, the company did not have a formal system for gathering feedback from clients or prospects. Insights came through hallway conversations, ad hoc emails, or one-off interactions—nothing consistent, trackable, or actionable.

Leadership recognized that without a structured feedback loop, it was impossible to understand the client experience, identify trends, or make confident, data-driven decisions.

This project marked the first step in creating a scalable Voice of Customer (VoC) program—one that would capture feedback at meaningful moments, route it to the right teams, and support continuous improvement across Sales and Operations.

Challenges

The company was starting from a blank slate. Key challenges included:

- **No standardized method** for collecting feedback across the customer journey.
- **No consistent survey formats**, questions, or branding.
- **No automation** to trigger surveys or track responses.
- **No central repository** for storing, reporting, or analyzing results.
- **Leadership lacked visibility** into satisfaction, risk factors, and experience trends.

The goal wasn't to fix a flawed system—it was to build the very first one.

Solution

The project built a simple, scalable foundation focused on clarity and reliability. The solution integrated **Salesforce** and **Qualtrics** to create a streamlined, repeatable feedback process.

What Was Built:
A survey development process and a suite of surveys aligned to key stages in the customer lifecycle:

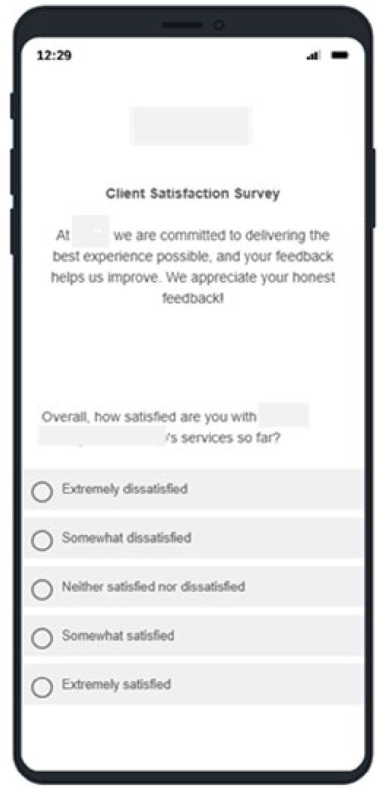
- Onboarding Survey – captures early impressions and expectations.
- Post-Project Survey – evaluates delivery, communication, and overall satisfaction.
- Closed-Lost Survey – identifies why prospective deals did not convert.
- Pulse Survey – quarterly check-ins to gauge account health.
- NPS Survey – measures loyalty and referral likelihood.

Development Process:

1. **Define Purpose and Audience**
    - We began by working with stakeholders to define the purpose of each survey, the target audience, and the distribution method (email, phone, anonymous, or sent by the client-facing advisor).
    - This ensured that every survey had a clear objective and appropriate recipients.
2. **Segmentation & Distribution Lists**
    - Developed segmentation lists, both static (pre-defined groups) and dynamic (based on CRM data or project activity), to target the right clients or prospects at the right time.
    - Lists were designed to support automation, reduce errors, and prevent duplicate or inappropriate survey sends.
3. **Trigger Setup & Automation**
    - Created triggers to send surveys automatically or manually, depending on the process and audience.
    - Automated triggers were tied to CRM stages or project milestones (e.g., project start, post-delivery), ensuring surveys went out consistently without requiring manual intervention.
    - Manual triggers included internal reminders to prompt advisors or project managers to send surveys for situations that required a personal touch.
    - Automated notifications were configured so the team would be alerted immediately when a survey was completed, allowing for timely follow-up or action on feedback.

4. **Survey Content Design**
    - Developed survey structure and content with clear, well-designed questions, balancing various formats (pick lists, grading scales, open-ended, etc) to capture actionable insights.
    - Incorporated standardized language and branding for consistency, professionalism, and ease of analysis.
    - Designed surveys to be quick, intuitive, and mobile-friendly to maximize response rates.
5. **Visibility & Reporting**
    - Created dashboards that analyzed survey responses, sentiment, and trends across questions, providing leadership and account teams with real-time visibility into client feedback.

This created the company's **first repeatable, scalable method** for capturing client and prospect feedback.



Outcomes

The launch of this foundational feedback system delivered immediate value:

- Collected 100+ responses within the first few months—more structured feedback than ever before.
- Post-project feedback prompted improvements in final deliverables and communication.
- Closed-lost insights informed pricing adjustments and clearer proposal language.
- Pulse and NPS data helped identify accounts needing proactive attention.
- Leadership gained visibility into customer sentiment for the first time, enabling more informed decision-making.

This program became the baseline for a long-term, data-driven client experience strategy.

Lessons Learned

- **Survey design is harder than it looks**. Teams often underestimate how challenging it is to write clear, unbiased questions that produce actionable insights. Thoughtful design is essential for meaningful data.
- **Consistency in questions matters**. Future iterations should include a core set of standardized questions across surveys to track trends over time and measure long-term improvements.
- **Process is everything**. A solid operational rhythm—consistent triggers, defined timing, and clarity on who receives what—is critical for maintaining response quality and avoiding survey fatigue.
- **Smart trigger logic prevents noise.** The system must include rules for excluding clients from receiving multiple surveys, avoiding mistimed sends, and removing individuals who shouldn't be contacted again.
- **Survey programs need an owner**. Qualtrics isn't a "set it and forget it" tool—someone must maintain surveys, review data, monitor response trends, and drive continuous improvement. Without clear ownership, the program risks losing momentum.