Survey Builder & Survey Design Playbook

NPS Survey CX OS

A practical guide to designing, configuring, distributing, and testing survey experiences in Salesforce.

Prepared for survey creators, administrators, and report creators

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Contents

1. Introduction

This playbook is a general-purpose guide for NPS Survey CX OS. It is written for users who create surveys, configure survey logic, distribute surveys, and review survey results. The goal is to make survey design easier to understand without assuming deep technical knowledge of Salesforce.

The guide explains the survey types supported by the platform, the Salesforce objects that surveys can be built around, the question types available in the builder, and the recommended workflow for designing and distributing surveys. It also includes a broad sample library of survey designs that can be adapted across industries.

How to use this guide: Start with the core workflow sections if you are new to the platform. Use the sample survey library when you need a ready-to-use survey structure or want to test specific question types, branching rules, and response scenarios.

2. What the Survey Builder Does

The Survey Builder is the central workspace for creating and preparing survey experiences. It brings together survey setup, object context, question design, branding, response handling, and deployment into a structured workflow.

Capability	What it enables
Create survey forms	Name the survey, add a description, and select the survey type.
Configure object context	Choose whether the survey is based on a Contact, Account, Opportunity, or Case.
Build questions	Use the question palette to add NPS, CSAT, CES, text, picklist, rating, file upload, ranking, and other question types.

Customize logic and design	Configure response mapping, design options, question dependencies, score levels, and respondent-facing styling.
Deploy surveys	Distribute surveys using a link, email, QR code, or scheduled campaign.
Review results	Use response records and dashboards to monitor responses, scores, participation, and follow-up activity.

Figure 1. example of the Create Form screen.

Platform Screenshot A. Actual Create Form screen showing name, description, and survey type selection.

3. Supported Survey Types: NPS, CSAT, CES, Static/Custom

NPS Survey CX OS supports multiple survey patterns. The type should be selected based on the question the business needs to answer, not simply based on the wording of the survey.

Figure 2. Survey type overview.

Survey Type	Purpose	Common Use Cases
NPS	Measures loyalty or recommendation intent, typically on a 0-10 scale.	Relationship health, renewal confidence, customer advocacy, referral likelihood.
CSAT	Measures satisfaction with a specific experience or interaction.	Case resolution, onboarding, events, training, implementation milestones.
CES	Measures how easy or difficult it was to complete an action.	Support effort, portal usability, application processes, data submission, renewal tasks.
Static/Custom	Used when the survey does not need the standard NPS, CSAT, or CES scoring model. In some implementations, these are predefined templates configured in the system and distributed as-is.	Voice-of-customer pulses, product feedback, compliance check-ins, feature prioritization, general intake feedback.

4. Salesforce Objects Used for Surveys: Contact, Account, Opportunity, Case

When creating a survey, users select the Salesforce object that gives the survey its business context. The supported object choices are Contact, Account, Opportunity, and Case.

Platform Screenshot B. Actual Configure Object screen linking the survey to a Salesforce object and ownership rules.

Object	When to use it	Example survey scenarios
Contact	Use when feedback belongs to an individual person.	Training feedback, onboarding surveys, event/webinar attendee feedback, preference surveys.
Account	Use when feedback represents an organization, customer account, partner, or household-level relationship.	Account health, quarterly business reviews, partner satisfaction, executive relationship NPS.
Opportunity	Use when feedback relates to a sales process, renewal, demo, evaluation, or buying journey.	Demo feedback, renewal readiness, proposal experience, implementation readiness.
Case	Use when feedback relates to a support, service, billing, issue, or request process.	Case resolution CSAT, support effort CES, escalation feedback, service recovery follow-up.

Design principle: Select the object that best represents the event or relationship you want to measure. For example, use Case when the survey follows a support interaction, Opportunity when the survey follows a sales milestone, and Account when the survey measures relationship health.

5. Question Types Available in the Builder

The question palette supports a wide range of question types. A good survey usually combines one primary scoring question with a small number of context, explanation, or follow-up questions.

Question Type	Best used for	Question Type	Best used for
Text	Short one-line response.	Text Area	Short open-ended explanation.
Long Text Area	Detailed comments or narrative feedback.	URL	Website, reference, or resource link.
Email	Email address collection or confirmation.	Picklist	Single-choice selection.
Multiselect Picklist	Multiple-choice selection where more than one answer may apply.	Date	Calendar date.
Date/Time	Specific date and time.	Number	Numeric input such as count or volume.
Percentage	Percent value such as adoption rate or completion estimate.	File Upload	Screenshots, documents, images, or attachments.
Rating	General rating scale such as 1-5.	Currency	Budget, cost, renewal amount, or revenue-related input.
Ranking	Prioritizing items in order of importance.	NPS	0-10 Net Promoter Score question.
CSAT	Customer Satisfaction question.	CES	Customer Effort Score question.

Figure 3. Survey question builder showing the palette, survey canvas, and live preview.

Platform Screenshot C. Actual Question Builder screen with the question palette, survey canvas, and preview pane.

6. Survey Design Workflow

A clear build sequence keeps survey design consistent and prevents errors later in the process. The recommended workflow is to define the purpose of the survey first, then configure the object, questions, dependencies, design, and deployment method.

Figure 4. Recommended survey design workflow.

Step	Action
1. Define the purpose	Decide what the survey needs to measure: loyalty, satisfaction, effort, or general feedback.
2. Select the survey type	Choose NPS, CSAT, CES, or Static/Custom.
3. Configure the Salesforce object	Select Contact, Account, Opportunity, or Case.
4. Add questions	Use the question palette and keep the survey focused.
5. Add logic	Configure branching rules for low scores, high scores, or selected answers.
6. Review design and scoring	Check branding, score levels, and any response mapping.
7. Deploy and test	Preview the survey, send test responses, and confirm dashboards update as expected.

7. Question Dependencies and Branching Logic

Question dependencies allow the survey to adapt based on a respondent's previous answer. This keeps surveys shorter and more relevant because follow-up questions only appear when they are needed.

Figure 5. Example CSAT branching logic with follow-up actions.

Platform Screenshot D. Actual Question Dependency screen used to create branching rules and conditional logic.

Pattern	Example
Low score follow-up	If NPS <= 6, CSAT <= 2, or CES indicates high effort, show a question asking what could be improved.
High score follow-up	If NPS >= 9 or CSAT = 5, ask whether the respondent is willing to provide a testimonial or additional positive feedback.

Other option follow-up	If Picklist = Other, show a Text Area asking for details.
Case not resolved	If the respondent says the issue is not resolved, show an escalation question or create follow-up action.
Duplicate suppression	Suppress or restrict a survey if the same respondent was surveyed recently, when that rule is configured.

8. Response Mapping, Score Levels, and Design Options

After questions are added, the survey can be refined using response mapping, score levels, and design options. These settings determine how responses are stored, how scores are categorized, and how the respondent-facing form appears.

Platform Screenshot E. Actual Response Mapping screen used to connect survey questions with Salesforce fields.

Platform Screenshot F. Actual builder configuration screens covering settings, design options, and score levels.

Platform Screenshot G. Actual Thank You Page editor with a live preview of the respondent confirmation page.

Configuration Area	Purpose
Response Mapping	Connect survey answers to fields on the selected Salesforce object when writeback or structured reporting is required.
Score Levels	Define score ranges, labels, and colors such as Promoter, Passive, and Detractor for NPS-style reporting.
Design Options	Adjust visual styling such as logo, colors, fonts, backgrounds, header image, footer image, and number of questions per page.

Preview and Apply	Use Apply to save design changes before previewing the respondent-facing view.

Figure 6. analytics-style view with filters and account/contact breakdown.

9. Survey Distribution Methods

Once the survey is ready, it can be distributed through different channels. The best channel depends on whether the survey is tied to a specific recipient list, a public event, or a controlled internal process.

Platform Screenshot H. Actual deployment, recipient selection, response report, and dashboard screens used after the survey is launched.

Platform Screenshot I. Actual Survey Response Analytics screen showing filters, account breakdowns, and score summaries.

Figure 7. survey deployment screen showing link, email, QR code, and recipient options.

Distribution Method	Best used when
Survey link	Use when the survey should be shared directly or embedded in another communication.
Email distribution	Use when surveys should be sent to selected recipients with a template and send/schedule controls.
QR code	Use when respondents should scan and complete the survey from a poster, handout, desk sign, event screen, or printed document.
CSV upload	Use when recipient contacts are not already in the system and need to be created or imported before sending.
Existing records	Use when Contacts, Accounts, Opportunities, or Cases already contain the audience or business context.

Reports/list views	Use when recipient groups are defined by report criteria or saved views.

10. Sample Survey Library: 20+ Ready-to-Use Survey Designs

This library provides ready-to-use survey designs across NPS, CSAT, CES, and Static/Custom survey patterns. Each survey includes the Salesforce object, survey type, trigger, question set, and sample branching rules. The examples are intentionally broad so they can be adapted across industries such as education, healthcare, professional services, SaaS, e-commerce, customer support, events, and account management.

The examples below are intentionally generic so they can be adapted across industries and use cases. They are supported by the platform capabilities shown in the screenshots earlier in the playbook.

NPS Surveys

The following examples can be adapted to similar business processes. Each design includes the survey type, Salesforce object, trigger, question set, and branching or follow-up rule.

Account Relationship NPS

Field	Value
Survey Type	NPS
Salesforce Object	Account
Trigger / Timing	Quarterly account health review

Purpose	Measure the overall strength of the account relationship and identify accounts needing attention.

#	Question Type	Question	Required	Notes / Logic
1	NPS	How likely are you to recommend our organization to a peer or colleague?	Required	Primary NPS metric.
2	Long Text Area	What is the main reason for your score?	Required	Marked as comment.
3	Picklist	Which area most influenced your rating? Options: Product value, Support, Account management, Pricing, Implementation, Other	Required	If Other, show a text follow-up.
4	Multiselect Picklist	Which teams should review your feedback? Options: Support, Sales, Product, Finance, Leadership	Optional	Helps route feedback.
5	Text Area	What one change would most improve your experience?	Optional	Shown if NPS <= 6.

Branching / follow-up rule: If NPS <= 6, show improvement question and trigger account follow-up. If NPS >= 9, ask whether the respondent is open to a reference conversation.

Customer Onboarding NPS

Field	Value
Survey Type	NPS
Salesforce Object	Contact
Trigger / Timing	30 days after onboarding completion
Purpose	Understand whether the onboarding experience created confidence and advocacy.

#	Question Type	Question	Required	Notes / Logic
1	NPS	How likely are you to recommend our onboarding experience to another new customer?	Required	Primary NPS metric.

2	Rating	How confident do you feel using the platform after onboarding?	Required	1-5 rating.
3	Picklist	Which onboarding activity was most helpful? Options: Kickoff, Training, Documentation, Office hours, Support chat	Required	Single selection.
4	Long Text Area	What would have made onboarding more effective?	Optional	Shown if NPS <= 6 or confidence <= 3.

Branching / follow-up rule: If confidence <= 3, show a follow-up asking what content or support was missing.

Renewal Readiness NPS

Field	Value
Survey Type	NPS
Salesforce Object	Opportunity
Trigger / Timing	60 days before renewal decision
Purpose	Assess loyalty and risk while a renewal opportunity is active.

#	Question Type	Question	Required	Notes / Logic
1	NPS	How likely are you to recommend continuing with our solution?	Required	Primary NPS metric.
2	Currency	What budget range has been planned for renewal or expansion?	Optional	Currency field.
3	Picklist	What is the biggest factor in your renewal decision? Options: Value, Pricing, Adoption, Support, Contract terms, Other	Required	Renewal driver.
4	Percentage	Approximately what percentage of your team is actively using the solution?	Optional	Adoption estimate.
5	Long Text Area	What concern should our team address before renewal?	Optional	Shown if NPS <= 6 or adoption < 50%.

Branching / follow-up rule: If adoption is below 50% or NPS <= 6, create a renewal risk follow-up.

Support Experience NPS

Field	Value
Survey Type	NPS
Salesforce Object	Case
Trigger / Timing	After high-priority case closure
Purpose	Measure whether a support interaction affected willingness to recommend.

#	Question Type	Question	Required	Notes / Logic
1	NPS	How likely are you to recommend our support team based on this case experience?	Required	Primary NPS metric.
2	CES	How easy was it to get your issue resolved?	Required	Effort metric.
3	Picklist	Which part of the case process most influenced your rating? Options: Speed, Communication, Knowledge, Resolution quality, Handoff, Other	Required	Driver field.
4	File Upload	Would you like to upload any supporting material related to the issue?	Optional	Useful for follow-up review.
5	Long Text Area	Please describe what could have improved the support experience.	Optional	Shown if NPS <= 6 or CES indicates high effort.

Branching / follow-up rule: If NPS <= 6, create a closed-loop follow-up case.

Training Program NPS

Field	Value
Survey Type	NPS
Salesforce Object	Contact
Trigger / Timing	After a customer training session
Purpose	Measure whether learners would recommend the training to others.

#	Question Type	Question	Required	Notes / Logic
1	NPS	How likely are you to recommend this training session to a colleague?	Required	Primary NPS metric.
2	Rating	How would you rate the instructor's clarity?	Required	1-5 rating.
3	Multiselect Picklist	Which topics were most valuable? Options: Setup, Reporting, Automation, Best practices, Troubleshooting	Optional	Multiple selections.
4	Long Text Area	What topic should be added or expanded in future sessions?	Optional	Open feedback.
5	Email	What email should we use for follow-up training resources?	Optional	Email field.

Branching / follow-up rule: If NPS >= 9, show a prompt asking whether the respondent would attend an advanced session.

Partner Program NPS

Field	Value
Survey Type	NPS
Salesforce Object	Account
Trigger / Timing	Semiannual partner feedback cycle

Purpose	Measure partner loyalty and identify partner enablement needs.

#	Question Type	Question	Required	Notes / Logic
1	NPS	How likely are you to recommend our partner program to another organization?	Required	Primary NPS metric.
2	Ranking	Rank the partner program areas by importance: Enablement, Leads, Support, Incentives, Product access	Required	Priority ranking.
3	Picklist	What is the biggest barrier to growth? Options: Training, Lead flow, Pricing, Support, Product fit, Other	Required	Single selection.
4	Text Area	What should we improve in the next partner cycle?	Optional	Open comment.
5	Percentage	What percentage of your pipeline is influenced by this partnership?	Optional	Estimated contribution.

Branching / follow-up rule: If barrier = Other, show a text follow-up. If NPS <= 6, assign partner manager follow-up.

CSAT Surveys

The following examples can be adapted to similar business processes. Each design includes the survey type, Salesforce object, trigger, question set, and branching or follow-up rule.

Post-Orientation CSAT

Field	Value
Survey Type	CSAT
Salesforce Object	Contact
Trigger / Timing	5 days after orientation completion
Purpose	Measure satisfaction with first-week or orientation activities.

#	Question Type	Question	Required	Notes / Logic
1	CSAT	Overall, how satisfied were you with your orientation experience?	Required	1-5 CSAT.
2	Rating	How would you rate the clarity of the orientation schedule and information?	Required	1-5 rating.
3	Rating	How helpful were staff during orientation?	Optional	Shown if CSAT < 4.
4	Picklist	What was the biggest challenge? Options: Navigation, Requirements, Technology setup, Social connections, Other	Optional	Shown if CSAT < 4.
5	Long Text Area	Please share any additional feedback about orientation.	Optional	Version changes based on CSAT score.

Branching / follow-up rule: If CSAT < 4, show Q3 and Q4. If CSAT = 5, show positive feedback prompt.

Case Resolution CSAT

Field	Value
Survey Type	CSAT
Salesforce Object	Case
Trigger / Timing	Immediately after case closure
Purpose	Measure satisfaction with a resolved support or service case.

#	Question Type	Question	Required	Notes / Logic
1	CSAT	How satisfied are you with the resolution of this case?	Required	Primary CSAT metric.
2	Picklist	Was your issue fully resolved? Options: Yes, No, Partially	Required	Resolution status.
3	Text Area	What could we have done better?	Optional	Shown if CSAT <= 2 or resolved != Yes.

4	File Upload	Upload any additional screenshots or documents if the issue is still unresolved.	Optional	Shown if resolved = No or Partially.
5	Rating	How would you rate the communication during the case?	Required	1-5 rating.

Branching / follow-up rule: If issue not resolved, trigger escalation review or reopen follow-up.

Product Demo CSAT

Field	Value
Survey Type	CSAT
Salesforce Object	Opportunity
Trigger / Timing	After sales demo or discovery session
Purpose	Measure satisfaction with the demo experience and sales consultation.

#	Question Type	Question	Required	Notes / Logic
1	CSAT	How satisfied were you with the product demo?	Required	Primary CSAT metric.
2	Picklist	Which part of the demo was most useful? Options: Use case discussion, Product walkthrough, Pricing, Q&A, Implementation overview	Required	Demo driver.
3	Text Area	What question was not fully answered during the demo?	Optional	Open comment.
4	Date	What date would you prefer for a follow-up session?	Optional	Scheduling input.
5	Currency	What approximate budget range should we consider for next steps?	Optional	Opportunity planning.

Branching / follow-up rule: If CSAT <= 2, notify opportunity owner for follow-up before the next sales stage.

Implementation Milestone CSAT

Field	Value
Survey Type	CSAT
Salesforce Object	Account
Trigger / Timing	After implementation milestone completion
Purpose	Evaluate satisfaction with a project milestone or delivery phase.

#	Question Type	Question	Required	Notes / Logic
1	CSAT	How satisfied are you with the most recent implementation milestone?	Required	Primary CSAT metric.
2	Rating	How would you rate project communication?	Required	1-5 rating.
3	Rating	How would you rate timeline management?	Required	1-5 rating.
4	Picklist	Which area needs the most attention? Options: Scope, Timeline, Training, Data, Testing, Other	Optional	Shown if CSAT <= 3.
5	Long Text Area	What should the project team adjust before the next milestone?	Optional	Shown if CSAT <= 3.

Branching / follow-up rule: If CSAT <= 3, route feedback to project owner and account owner.

Webinar Attendee CSAT

Field	Value
Survey Type	CSAT

Salesforce Object	Contact
Trigger / Timing	After webinar attendance
Purpose	Measure satisfaction with a virtual event or webinar experience.

#	Question Type	Question	Required	Notes / Logic
1	CSAT	How satisfied were you with the webinar overall?	Required	Primary CSAT metric.
2	Rating	How useful was the content?	Required	1-5 rating.
3	Date/Time	When did you attend the webinar?	Optional	Useful for multiple sessions.
4	Multiselect Picklist	Which topics would you like in future sessions? Options: Product basics, Advanced reporting, Automation, Integrations, Use cases	Optional	Multiple selections.
5	URL	If you have a reference resource to share, paste the link here.	Optional	URL validation.

Branching / follow-up rule: If CSAT >= 4, show future topic selection. If CSAT <= 2, ask what was missing.

Billing Interaction CSAT

Field	Value
Survey Type	CSAT
Salesforce Object	Case
Trigger / Timing	After a billing-related case is closed
Purpose	Understand satisfaction with billing support or account administration.

#	Question Type	Question	Required	Notes / Logic

1	CSAT	How satisfied are you with the handling of your billing request?	Required	Primary CSAT metric.
2	Picklist	What type of billing request was this? Options: Invoice, Payment, Contract, Refund, Tax, Other	Required	Request category.
3	Rating	How clear was the information provided?	Required	1-5 rating.
4	Text Area	What information was unclear or missing?	Optional	Shown if clarity <= 3.
5	Currency	What invoice or amount was involved, if applicable?	Optional	Currency input.

Branching / follow-up rule: If CSAT <= 2, create a billing manager review task.

CES Surveys

The following examples can be adapted to similar business processes. Each design includes the survey type, Salesforce object, trigger, question set, and branching or follow-up rule.

Support Effort CES

Field	Value
Survey Type	CES
Salesforce Object	Case
Trigger / Timing	After support case resolution
Purpose	Measure how easy it was for the customer to get help.

#	Question Type	Question	Required	Notes / Logic
1	CES	How easy was it to get your issue resolved?	Required	Primary CES metric.
2	Number	How many times did you contact support about this issue?	Required	Interaction count.
3	Picklist	Which support channel did you use most? Options: Email, Phone, Chat, Portal, Other	Required	Channel driver.

4	Text Area	What made the process difficult?	Optional	Shown if CES indicates high effort.
5	File Upload	Upload any screenshots that show unresolved errors, if applicable.	Optional	Supporting evidence.

Branching / follow-up rule: If CES indicates high effort, ask for difficulty details and trigger follow-up.

Application Process CES

Field	Value
Survey Type	CES
Salesforce Object	Opportunity
Trigger / Timing	After application or evaluation stage completion
Purpose	Measure ease of completing an application, quote, or evaluation process.

#	Question Type	Question	Required	Notes / Logic
1	CES	How easy was it to complete the application or evaluation process?	Required	Primary CES metric.
2	Picklist	Which step took the most effort? Options: Form completion, Documentation, Approval, Pricing, Scheduling, Other	Required	Process driver.
3	Text Area	What would have made the process easier?	Optional	Shown if CES indicates high effort.
4	Date	When did you complete the process?	Optional	Date input.
5	Email	What email should we use for follow-up?	Optional	Follow-up contact.

Branching / follow-up rule: If most effort = Other, show a details field.

Customer Portal CES

Field	Value
Survey Type	CES
Salesforce Object	Account
Trigger / Timing	After portal launch or major portal task
Purpose	Measure ease of using a customer or partner portal.

#	Question Type	Question	Required	Notes / Logic
1	CES	How easy was it to complete your task in the portal?	Required	Primary CES metric.
2	Picklist	What task were you trying to complete? Options: View records, Download documents, Submit request, Update profile, Run report, Other	Required	Task context.
3	Rating	How would you rate the portal navigation?	Required	1-5 rating.
4	Text Area	What was confusing or difficult?	Optional	Shown if navigation <= 3 or CES indicates high effort.
5	URL	Paste the page URL where you experienced difficulty, if applicable.	Optional	Useful for troubleshooting.

Branching / follow-up rule: If URL is provided and effort is high, route to portal support team.

Knowledge Base CES

Field	Value
Survey Type	CES

Salesforce Object	Contact
Trigger / Timing	After knowledge article or self-service use
Purpose	Measure whether self-service content helped users complete a task.

#	Question Type	Question	Required	Notes / Logic
1	CES	How easy was it to find the information you needed?	Required	Primary CES metric.
2	Picklist	Did the article solve your issue? Options: Yes, Partially, No	Required	Outcome.
3	Rating	How clear was the article?	Required	1-5 rating.
4	Text Area	What information should be added or improved?	Optional	Shown if solved != Yes or clarity <= 3.
5	URL	Which article or page did you use?	Optional	Resource URL.

Branching / follow-up rule: If solved = No, show improvement question and route to content owner.

Renewal Process CES

Field	Value
Survey Type	CES
Salesforce Object	Opportunity
Trigger / Timing	After renewal quote acceptance
Purpose	Measure how easy the renewal process was for the buyer.

#	Question Type	Question	Required	Notes / Logic
1	CES	How easy was it to complete the renewal process?	Required	Primary CES metric.

2	Rating	How clear were the renewal options?	Required	1-5 rating.
3	Picklist	Which step required the most effort? Options: Pricing, Legal review, Procurement, Approval, Signature, Other	Required	Renewal friction.
4	Text Area	What should we simplify before the next renewal?	Optional	Shown if CES indicates high effort.
5	Percentage	What percentage of the renewal process felt complete before the final call?	Optional	Readiness estimate.

Branching / follow-up rule: If effort is high or clarity <= 3, alert opportunity owner.

Document Submission CES

Field	Value
Survey Type	CES
Salesforce Object	Case
Trigger / Timing	After document upload or document request completion
Purpose	Measure ease of submitting documents or evidence for a service request.

#	Question Type	Question	Required	Notes / Logic
1	CES	How easy was it to submit the required documents?	Required	Primary CES metric.
2	Number	How many documents did you submit?	Optional	Document count.
3	File Upload	Upload any remaining document you could not submit through the process.	Optional	Optional support.
4	Text Area	What made the submission process difficult?	Optional	Shown if CES indicates high effort.
5	Picklist	Which part was most difficult? Options: Instructions, File size, Format, Login, Upload page, Other	Optional	Shown if CES indicates high effort.

Branching / follow-up rule: If file upload is used after a high-effort score, route to support for review.

Static / Custom Surveys

The following examples can be adapted to similar business processes. Each design includes the survey type, Salesforce object, trigger, question set, and branching or follow-up rule.

Voice of Customer Pulse

Field	Value
Survey Type	Static/Custom
Salesforce Object	Account
Trigger / Timing	Scheduled quarterly feedback cycle
Purpose	Collect broad account feedback that does not need a single standard score.

#	Question Type	Question	Required	Notes / Logic
1	Rating	How would you rate the overall value received this quarter?	Required	1-5 rating.
2	Ranking	Rank the areas most important to your organization: Product, Support, Training, Pricing, Innovation	Required	Priority ranking.
3	Multiselect Picklist	Which areas should we focus on next quarter? Options: Support, Reporting, Integrations, Training, Account reviews	Optional	Multiple selections.
4	Long Text Area	What should we understand about your priorities right now?	Optional	Open feedback.
5	Percentage	What percentage of your team is currently active?	Optional	Adoption estimate.

Branching / follow-up rule: If value rating <= 3, show a follow-up asking what outcome was missed.

Employee Experience Pulse

Field	Value
Survey Type	Static/Custom
Salesforce Object	Contact
Trigger / Timing	Monthly or quarterly internal pulse
Purpose	Collect lightweight internal feedback using a custom question set.

#	Question Type	Question	Required	Notes / Logic
1	Rating	How would you rate your overall work experience this month?	Required	1-5 rating.
2	Multiselect Picklist	Which factors affected your experience? Options: Workload, Communication, Tools, Manager support, Team collaboration, Benefits	Optional	Multiple selections.
3	Picklist	Do you have the tools needed to do your work effectively? Options: Yes, No, Partially	Required	Single selection.
4	Long Text Area	What is one improvement you would suggest?	Optional	Open feedback.
5	Date/Time	When was your last team event or check-in?	Optional	Date/time input.

Branching / follow-up rule: If tools = No or Partially, show a follow-up asking what is missing.

Product Feature Prioritization

Field	Value
Survey Type	Static/Custom

Salesforce Object	Account
Trigger / Timing	Before roadmap planning or advisory board review
Purpose	Prioritize product improvements using ranking and open feedback.

#	Question Type	Question	Required	Notes / Logic
1	Ranking	Rank these product areas by importance: Reporting, Automation, Integrations, Mobile, Permissions, Performance	Required	Ranking question.
2	Text	What is the single feature you need most?	Required	Short text.
3	Percentage	What percentage of your users would benefit from that feature?	Optional	Impact estimate.
4	Currency	What approximate value would this feature create or protect?	Optional	Value estimate.
5	Long Text Area	Please explain the business impact of your top priority.	Optional	Open narrative.

Branching / follow-up rule: If estimated value is provided, route to product strategy review.

Website Usability Feedback

Field	Value
Survey Type	Static/Custom
Salesforce Object	Contact
Trigger / Timing	After website or portal visit
Purpose	Collect usability feedback using navigation and content questions.

#	Question Type	Question	Required	Notes / Logic

1	Rating	How would you rate the ease of navigation?	Required	1-5 rating.
2	Picklist	Which section did you use most? Options: Home, Product, Pricing, Resources, Support, Checkout, Other	Required	Website area.
3	Text Area	Describe any difficulty you encountered.	Optional	Shown if rating <= 3.
4	Multiselect Picklist	Which improvements would help? Options: Search, Navigation, Live chat, Page speed, Mobile layout, More examples	Optional	Multiple selections.
5	URL	Paste the page URL related to your feedback, if available.	Optional	URL input.

Branching / follow-up rule: If rating <= 3, show difficulty details and improvement options.

E-Commerce Checkout Feedback

Field	Value
Survey Type	Static/Custom
Salesforce Object	Contact
Trigger / Timing	After completed or abandoned checkout follow-up
Purpose	Understand checkout friction across online purchase journeys.

#	Question Type	Question	Required	Notes / Logic
1	Rating	How would you rate your checkout experience?	Required	1-5 rating.
2	Picklist	What best describes your purchase? Options: First purchase, Repeat purchase, Subscription, Trial, Gift, Other	Required	Purchase type.
3	Number	How many items were in your cart?	Optional	Cart size.
4	Text Area	What, if anything, made checkout difficult?	Optional	Shown if rating <= 3.
5	File Upload	Upload a screenshot of any error you encountered.	Optional	Shown if difficulty is reported.

Branching / follow-up rule: If rating <= 3, show difficulty question and optional file upload.

Conference or Event Feedback

Field	Value
Survey Type	Static/Custom
Salesforce Object	Contact
Trigger / Timing	After event or session attendance
Purpose	Collect event feedback without requiring an Event object context.

#	Question Type	Question	Required	Notes / Logic
1	Picklist	How satisfied were you with the event overall? Options: Very satisfied, Satisfied, Neutral, Dissatisfied, Very dissatisfied	Required	Single selection.
2	Text Area	What did you enjoy most?	Optional	Shown if satisfaction is positive.
3	Text Area	What should be improved for future events?	Optional	Shown if satisfaction is neutral or negative.
4	Date	What date did you attend?	Required	Date input.
5	Number	How many sessions did you attend?	Optional	Count.
6	File Upload	Upload any event-related photos or documents you want to share.	Optional	Optional upload.

Branching / follow-up rule: If satisfaction is negative, show improvement question and route to event owner.

Compliance Documentation Check

Field	Value
Survey Type	Static/Custom
Salesforce Object	Case
Trigger / Timing	After documentation request is completed
Purpose	Verify whether requested documentation was clear, complete, and easy to submit.

#	Question Type	Question	Required	Notes / Logic
1	Picklist	Was the requested documentation clearly explained? Options: Yes, No, Partially	Required	Clarity check.
2	File Upload	Upload any document that still needs review.	Optional	Document support.
3	Text Area	What instruction was unclear?	Optional	Shown if clarity is No or Partially.
4	Date	When was the documentation submitted?	Optional	Date input.
5	Email	What email should receive status updates?	Optional	Contact email.

Branching / follow-up rule: If clarity is No or Partially, create a follow-up task for the case owner.

General Intake Feedback

Field	Value
Survey Type	Static/Custom
Salesforce Object	Case
Trigger / Timing	After request intake form submission

Purpose	Evaluate whether the intake process captured the right information.

#	Question Type	Question	Required	Notes / Logic
1	Picklist	What type of request did you submit? Options: Support, Billing, Access, Change request, Data request, Other	Required	Request category.
2	Rating	How complete was the intake form?	Required	1-5 rating.
3	Text Area	What information did the form not allow you to provide?	Optional	Shown if rating <= 3.
4	File Upload	Upload any supporting materials for your request.	Optional	Supporting file.
5	Date/Time	When do you need a response?	Optional	Preferred response deadline.

Branching / follow-up rule: If response deadline is urgent, flag the case for review.

Final Review

Before sending a survey broadly, preview the form, submit at least one test response, verify that branching rules behave correctly, and confirm that response records and dashboards update as expected. This final check helps ensure that survey creators, report creators, and business owners can trust the results after deployment.