NPS Survey – v4 | Release notes

NPS Survey

Measure Net Promoter Score , Transform Customer Service

salesforce available on AppExchange

Release Notes – NPS Survey

Version: 4.4
Release Date: August 26, 2025

Overview

NPS Survey v4.0 delivers powerful new features that help organizations collect richer feedback, act faster, and gain deeper insights—all inside Salesforce.

This release focuses on:

- Flexible survey customization – build any survey, brand it, and launch at scale.

- Smarter automation – reduce manual work with workflows and closed-loop feedback.

- Richer analytics & dashboards – uncover trends and drive decisions with real-time data.

- Improved scalability & admin controls – support growth with enterprise-ready governance.

Business Impact:

- Increase survey response rates with engaging, branded surveys.

- Close the feedback loop faster with automated workflows.

- Empower executives and managers with real-time dashboards.

- Improve compliance and security for enterprise deployments.

What's New in v4.4

1. Dynamic Survey Builder

- Build NPS, CSAT, CES, ranking, and custom surveys.

- Drag-and-drop 15+ question types including rating, ranking, text, and currency.

- Enhanced branding: logos, colors, fonts, and dynamic themes.

- Multi-lingual support and device-responsive layouts.

- Use Case: A customer success team can launch branded CSAT surveys after onboarding, in multiple languages, without IT support.

2. Smarter Automation & Workflows

- Salesforce Flow integration to auto-trigger follow-ups, case creation, and escalations.

- Automated thank-you emails and detractor alerts.

- Response throttling to prevent duplicate entries.

- Use Case: If a customer submits a low NPS score, a case is automatically created and assigned to the account manager with follow-up reminders.

3. Advanced Reporting & Dashboards

Delivering real-time, actionable insights for every role:

- Executive Dashboard – NPS trends, survey response rates, and satisfaction levels across regions or departments.

- Drill-Down Views – Analyze by project, account, or time period.

- Trend Analysis – Month-over-month scoring with variance tracking.

- Sentiment Analysis – Word clouds and insights from open-text feedback.

- Export Options – Excel, PDF, Tableau integration for extended analysis.

- Use Case: A VP of Customer Success can quickly spot declining NPS trends in a region and drill down to account-level feedback.

4. Closing the Feedback Loop

- Automated case creation for detractors.

- Task assignments to account managers with resolution tracking.

- Feedback workflows with alerts and reminders.

- Use Case: A detractor response immediately notifies the support team, assigns a follow-up task, and tracks resolution status inside Salesforce.

5. Admin & Security Enhancements

- Role-based access for survey creation, dashboards, and reporting.

- Audit logging for compliance.

- Support for multi-org deployments.

- GDPR, CCPA, HIPAA-ready.

- Use Case: Large enterprises can manage surveys across multiple business units while ensuring data privacy compliance.

Improvements

This release includes enhancements focused on usability, performance, and integration, ensuring smoother survey creation, faster response collection, and more effective dashboard insights for administrators and users alike.

- Extended question limit per survey: 25 → 50.

- Faster response collection with an optimized performance engine.

- Cleaner survey UI for higher completion rates.

- Improved dashboard refresh for near real-time analytics.

- Enhanced APIs for external imports/exports.

Bug Fixes

Version 4.0 addresses key issues identified in previous releases, ensuring accurate data capture, consistent branding, and seamless survey functionality across all supported languages.

- Fixed issue with NPS responses not syncing to Salesforce reports.

- Resolved duplicate record creation during batch imports.

- Corrected logo misalignment in email templates.

- Fixed language pack issues for non-English surveys.

Dashboards & Reports Enhancements

Version 4.0 introduces robust dashboard and reporting capabilities, giving you actionable insights into survey distribution, response rates, customer loyalty drivers, and follow-up actions. These dashboards allow executives, managers, and frontline teams to monitor NPS performance at both transactional and relationship levels.

Survey Sent Dashboards

Track the surveys sent and the volume of customer engagement.

Sales Order (CS)

- o **Purpose:** Tracks surveys sent after customer service (CS) interactions like order delivery, issue resolution, or case closure.

- o **Data Source:** Salesforce records linked to Sales Orders (Service Cloud).

- o **Business Rule:** Triggered by Sales Order lifecycle events (e.g., order completion, invoice sent).

- o **Primary Use:** Analyze volume and timing of CS-related NPS surveys.

Sales Team NPS

- o **Purpose:** Evaluates customer feedback from sales team interactions.

- o **Data Source:** Salesforce records tied to Sales Contacts (Leads, Opportunities).

- o **Business Rule:** Triggered by completed deals, account check-ins, or milestone touchpoints.

- o **Primary Use:** Assess sales team performance using NPS scores from customer engagements.

Response Rate Dashboards

Measure how effective surveys are conducted.

1. **Response Rate – Transactional Sales Order**

    o **Scope:** Survey responses for individual Sales Orders.

    o **Business Rule:** Calculates % of responses over total surveys sent per transaction.

    o **Use Case:** Evaluate engagement and effectiveness of transactional surveys.

2. **Response Rate – Sales Contact**

    o **Scope:** Survey responses based on contact-level interactions.

    o **Business Rule:** Calculates % responses from named contacts (non-transactional).

    o **Use Case:** Track engagement from key stakeholders or decision-makers.

Drivers of Loyalty

Understand why customers give specific NPS scores.

- **Definition:** Recurring themes or feedback explaining the score.

- **Sales Order Context:** Product delivery, ease of purchase, issue resolution.

- **Sales Contact Context:** Relationship quality, trust, communication.

- **Business Rule:** Extracted via keyword tagging or sentiment analysis, mapped to categories like Service, Pricing, Delivery, Communication.

- **Use Case:** Pinpoint what drives loyalty and dissatisfaction to prioritize improvements.

Close the Loop Summary

Monitor follow-up actions with Detractors and Passives.

- **Definition:** Tracks actions taken post-feedback.

- **Business Rule:** Follow-up must be logged in Salesforce (Case, Task, Status updated).

- **Insights:** % of closed feedback loops, average follow-up time, outcomes of corrective actions.

NPS Comments

Capture qualitative feedback for analysis.

1. **Transactional NPS Comment:** Linked to Sales Orders; assesses specific touchpoints.

2. **Sales Contact Comment:** Linked to Sales Contacts; assesses relationship quality and sales team engagement.

- **Business Rule:** Comments are stored, linked to record types, tagged with NPS scores, and analyzed for recurring themes.

Close the Loop – Sales Contact

Drill-down view of follow-ups at the contact level.

- **Business Rule:** Filters only Sales Contact follow-ups; captures status, owner, resolution date.

- **Difference from General Summary:** Focuses exclusively on relationship management follow-ups, not transactional feedback.

Key Reports

1. **Surveys Sent – Sales Order (CS):** Count, % sent per order/product.

2. **Surveys Sent – Sales Team NPS:** Count per rep, average NPS score.

3. **Response Rate – Transactional Sales Order:** Total sent, responses, response rate %.

4. **Response Rate – Sales Contact:** Total sent, responses, response rate %.

5. **Drivers of Loyalty – Sales Order:** Count by driver, avg. NPS, sentiment score.

6. **Drivers of Loyalty – Sales Contact:** Count by driver, avg. NPS score by rep/region.

7. **Close the Loop Summary:** Follow-up completion rate, avg. time, resolution status.

8. **NPS Comments – Transactional:** Latest comments by order, score, sentiment.

9. **NPS Comments – Sales Contact:** Latest comments by contact, score, rep assigned.

10. **Close the Loop – Sales Contact:** Completion %, time to close, owner.

Key Dashboards

Use Salesforce Lightning Dashboard Builder. Filter dashboards by Date Range, Sales Rep, Customer Segment.

1. **Survey Sent Overview:** Pie chart (sent by type), bar chart (sent by rep), table (top accounts).

2. **Response Rate Dashboard:** Dual bar (sent vs. responses), gauge (overall rate), heat map (region).

3. **Drivers of Loyalty:** Bar chart (top drivers), stacked bar (driver by score category), word cloud.

4. **Close the Loop Performance:** Funnel (detractors → resolved), table (overdue), gauge (% followed up), line chart (time trends).

5. **NPS Comments Overview:** Tables (latest 10 transactional/contact comments), sentiment bar.

6. **Sales Contact Follow-up Tracker:** Bar chart (completion by rep), table (open follow-ups), donut chart (status breakdown).
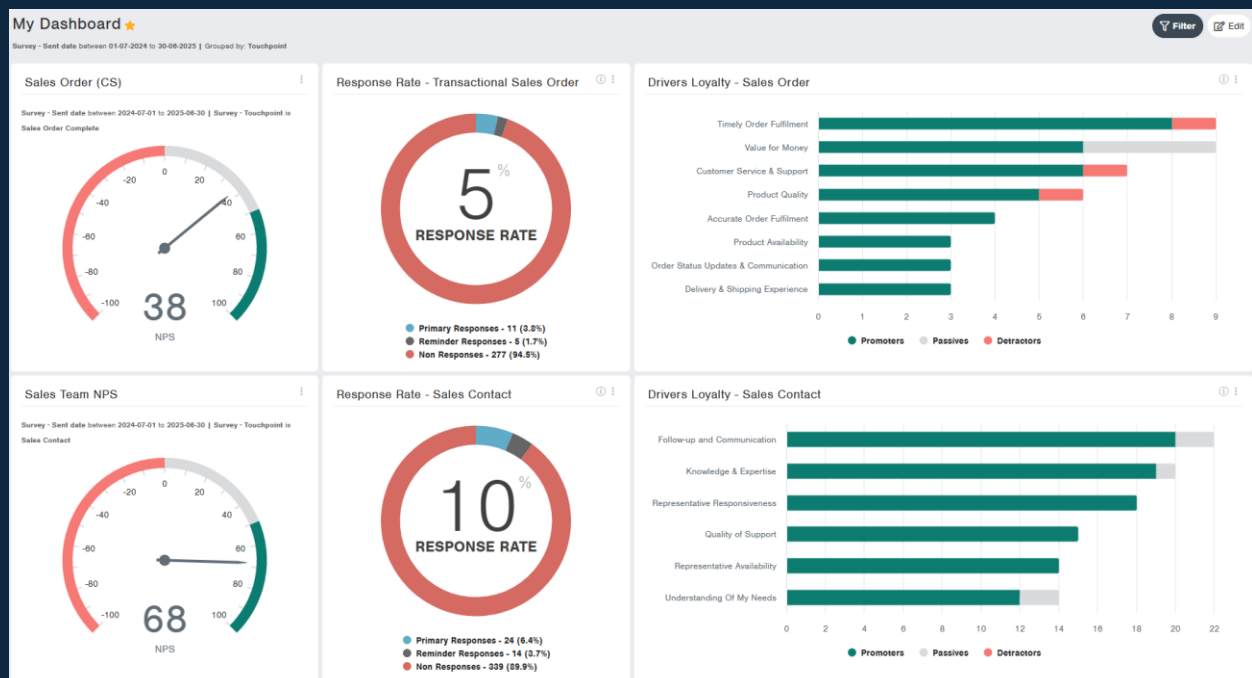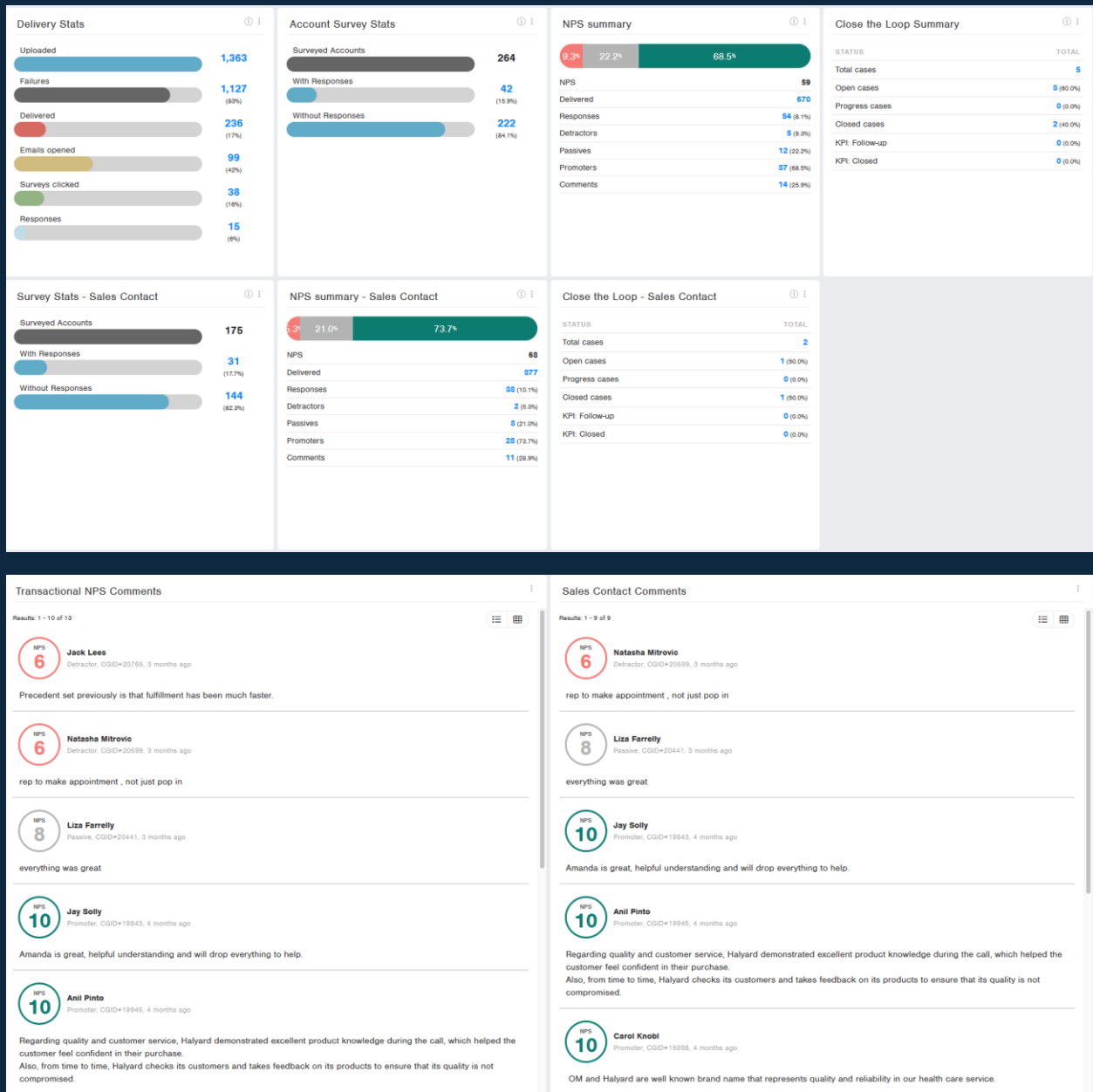
Resources

- **Product Overview:** saleshub.info/nps-survey

- **AppExchange Listing (install, videos, docs, configs):** NPS Survey on Salesforce AppExchange

Upgrade Notes

All existing customers will transition to version 4.0 automatically. Admins should review configurations and survey templates to ensure seamless functionality after the upgrade.

- Automatic upgrade to v4.0 starts August 30, 2025.

- Admins should review and update survey templates post-upgrade.

- Some reporting dashboards may require updated user permissions.

Looking Ahead – v4.1 Sneak Peek

We are continuously enhancing the NPS Survey platform to deliver smarter insights and better automation. Upcoming features in version 4.1 will further improve survey distribution, predictive analytics, and team collaboration.

- AI-powered predictive NPS scoring for proactive engagement.

- Advanced scheduling for survey distribution.

- Slack and MS Teams integration for instant feedback notifications.

SalesHub NPS Application – Pricing Overview

Component	Price	What's Included
Custom Survey Builder	**$5/user/month** (billed annually)	• Build any survey or form- 15+ question types • Advanced branching & logic • QR code, email delivery • Field mapping & scoring • Custom templates
NPS Survey Dashboard (LWC)	**$5/user/month** (billed annually)	• Real-time NPS scoring • Promoter/Passive/Detractor trends • Response rates & loyalty drivers • Automated close-the-loop workflows • Clean, responsive Lightning interface
Implementation & Annual Support	**Starting at $2,500/year**	• Full setup & onboarding • Dashboard customization • Admin training & enablement • Ongoing platform support • All future enhancements included • Access to new features, driven by partnerships with Salesforce & CX leaders
Premium Support (Optional)	**35% of annual license**	• Priority response SLAs • 1:1 admin training • Dedicated account manager • Strategic platform guidance

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