

The Trifecta View of the SaaS Customer Journey

Integrating CX Survey Data in Salesforce or Other CRM of Record

CES: ONBOARDING

How easy was it to get started?

Critical first phase of a SaaS relationship. Gauge your first impression. Get valuable insight about the onboarding process by triggering a Customer Effort Score survey.

CES

CSAT: SUPPORT

How satisfied are you?

The customer reaches out for help. After a case has been addressed, trigger a Customer Satisfaction survey for important feedback about their interaction with your team.

CSAT

NPS: RENEWAL

How is our relationship?

Time passes and your customers have more experience working with you and your product. It's time to gauge loyalty. Trigger a Net Promoter Score survey 30 days before a renewal conversation.

NPS

New customer journey begins

CRM Dashboard						
CONTACT Lesley Customer						
RELATED		DETAILS				
Wootric Score						
Current CES score	6			Last Response Date	12/12/2017 7:10 PM	
Current CSAT score	3			Last Decline Date	9/21/2017 7:59 AM	
Current NPS score	9			Promoter Level	Promoter	
Wootric Feedback						
Date	Survey	Type	Score	Customer Feedback	Channel	
03/15/2017 13:45	CES	Response	6	I got it done pretty quickly. Wizard could be smarter.	web	
06/16/2017 14:19	CSAT	Response	3	Helpful, but was hard for agent to understand my issue.	email	
12/12/2017 07:10	NPS	Response	9	Love you guys. Happy with the product!	web	

zoom

Smartly integrated data was a big win with Wootric. To now have this customer feedback at the fingertips of every Salesforce user in our organization is HUGE!

Jim Mercer,
Customer Success at Zoom

WOOTRIC Get CX journey metrics into your CRM. Win customers for life.



For the complete article, click ["Trifecta View" of the SaaS Customer Journey Using CX Surveys](#)