Touchpoint Surveys

For Graingers

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# Overview

The Touchpoint survey process is managed by the Marketing Cloud, sending out email survey content blocks and receiving the results.

The process is divided between two different processes, the Outbound process to send the survey, and the Inbound process to manage and write results.

# Outbound Process

Diagram

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Salesforce reports with filters target the correct audience for the survey. There are four surveys triggered from these reports:

* Move in Survey
* 3 Month Survey
* 8 Month Survey
* Move out Survey

Note: The Repairs survey is triggered by FSI and is not initiated using Salesforce reports. The repairs survey uses a separate report to match results via email address for building and opportunity data.

## Salesforce Reports

Salesforce reports with filters target the correct audience for the survey. There are four surveys triggered from these reports:

* Move in Survey
* 3 Month Survey
* 8 Month Survey
* Move out Survey

Salesforce reports in the Marketing Cloud Admin folder capture the target audience for the Surveys based on their Tenancy Start Date (Move in, Month 3 and Month 8 Surveys) and Tenancy Actual End Date (Actual Move Out)

Graphical user interface, text, application, Word, Teams

Description automatically generated*Marketing Cloud Admin folder in Salesforce Reports*

Each Reports captures the correct recipient for the Survey based on filters on the report.

Additionally, there are two reports used for adding additional data to survey results:

* Touchpoint Repairs - Current Tenant
* Touchpoint Template - Building data

Note: Marketing change to the Salesforce reports by adding and removing fields may prevent the Marketing Cloud from importing the required data successfully.

Changes to the filters will not affect the imports.

The imports are specified in section 2 and held in the Marketing Cloud.

## Move in Survey (Touchpoint Customer - Move in)

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## Month 3 Survey (Touchpoint Customer - Month 3)

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## Month 8 Survey (Touchpoint Customer - Month 8)

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## Move out Survey (Touchpoint Customer - Actual Move Out)

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## Repairs Survey (Touchpoint Repairs - Current Tenant)

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The repairs survey is not triggered by Marketing Cloud, with a survey link being created by an FSI repairs email. Once the survey response is captured, Marketing Cloud using a SQL query to match the email address against existing tenants to create the full survey response.

The Touchpoint Repairs – Current Tenant report is imported into the Marketing cloud to match survey emails against.

## Building Data (Touchpoint Template – Building data)

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The building data is captured in a report to update the relevant opportunity with additional information, such as the names of building managers, estate and portfolio.

Once a survey response is received, this data is added to the record through SQL query.

## Marketing Cloud imports

## Marketing Cloud imports to Data Extension

The Marketing Cloud imports the contents of each Salesforce report through the following imports:

* Touchpoint - Move in
* Touchpoint - Month 3
* Touchpoint - Month 8
* Touchpoint - Move out
* Touchpoint - Repairs Tenant
* Touchpoint Actual Move Out
* Touchpoint Building Data

The imports are located in Marketing Cloud Email Studio > Interactions > Imports

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Each of these imports will capture the data from the Salesforce report, and map them to a data extension

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The Data Extensions for each import used for sending are held in the Touchpoint Surveys folder, in Marketing Cloud email studio > Subscribers > Data Extensions > Touchpoint Surveys > Sending

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The Data Extensions for repairs and building data are held in the Touchpoint Surveys folder, in Marketing Cloud email studio > Subscribers > Data Extensions > Touchpoint Surveys > Map to Salesforce

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## Marketing Cloud imports Automation

Each import is automated daily, using Automation Studio. The imports are managed with a single automation, located in Automation Studio > Touchpoint Surveys > Import Touchpoint Subscriber Data

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The import runs each day to update the data held within the Marketing Cloud data extensions.

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## Journey Sends

The outbound survey process is sent using Journey Builder. All Touchpoint Journeys are held within Journey Builder> Touchpoint Surveys. The Journeys marked ‘Touchpoint Send’ fire the survey sends.

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Graphical user interface, text, application

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# Inbound Process

Once a survey has been received, Marketing Cloud will merge the data with building and sender data to create a full response.

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This process uses SQL queries to group the data before mapping it to the Salesforce ‘Touchpoint Surveys’ object.

## Repairs Survey

The Repairs survey is not sent through Pardot, but uses the Cloud page below to capture Survey responses. All Touchpoint CloudPages are held in the Collection ‘Touchpoint Surveys’.

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The repairs survey (Repairs Survey AMPscript) uses a ‘Smart Capture Form’ embedded in the page to capture survey responses.

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The Survey form using AMPscript to capture the email address and survey time from the link using the following snippet:

%%[ VAR @email SET @email = RequestParameter('emailaddress') ]%%

The above script creates a variable @email from the url, using RequestParameter. This will capture the value transferred by the link through the *?emailaddress=* parameter in the URL.

e.g. <https://cloud.marketing-graingerplc.co.uk/Repairs_Survey?emailaddress=Example@survey.com>

would return the value ‘Example@Survey.com

%%[ Var @servertime, @surveytime SET @servertime = NOW() SET @surveytime = SystemDateToLocalDate(@servertime) ]%%

This captures the current system time at the time of submission.

Results for the repairs survey are captured in the data extension ‘Repairs Survey Responses – Hidden Email’

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## Repairs Data Merge

The repairs survey does not have additional information about the customer until it is linked to other data held in the Marketing Cloud. This is managed by Automation Studio, using email to lookup to the current customers data extension using email address.

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SQL in automation studio matches values by email address to create the ‘Touchpoint – Full Response – Repairs’ data.

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# Syncing to Salesforce

## Merging Data

Once a survey response is received, Marketing Cloud Automation Studio uses SQL queries to merge the Sending, Response and Building data into a single data extension. The automation is located in Automation Studio > Touchpoint Surveys > Import Touchpoint SQL Data merge.

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## SQL Queries

See Appendix 1 for query details

## Map to Salesforce Data Extensions

The results of the SQL queries are joined to populate the ‘Map to Salesforce folder’ in Email Studio > Data Extensions > Touchpoint Surveys > Map to Salesforce

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These data extensions for the starting point of the ‘Map to Salesforce’ journeys.

## Map to Salesforce Journeys

One all the data has been merged via SQL activities in Automation Studio, journeys are used to map the results to the touchpoint survey object.

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Each Journey uses the ‘Update Salesforce Object’ tool to map between Marketing Cloud data extension and the Touchpoint Survey Object.

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The update object activity is linked to the Touchpoint Survey Response object.

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The journey creates new touchpoint survey responses.

A picture containing text

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Each data extension field is then mapped to the relevant field on the touchpoint object:

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The mapping is from the Journey Data to the Salesforce field. This will be different for each survey type as the responses differ depending on the survey.

## Touchpoint Survey Object

The touchpoint survey object in Salesforce holds the responses to surveys

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Graphical user interface, text, application, email

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Each Touchpoint Survey response captures the personal info, then has sections for the survey response, Tenancy information and Building information.

Each survey has its own record type, depending on the type of survey:

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Each of these record types has a default layout, showing the fields related to that survey.

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Note: Creating a new automated survey will require additional fields to be created on the touchpoint survey object, and a new record type and layout to show the survey response.

# Appendix A: SQL Queries

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SQL queries for merging data are held in ‘Automation Studio > Activities > SQL Query > Touchpoint SQL

The SQL queries use an INNER JOIN to match data between data extensions. An example is below:

*select*

*[Move in Survey Responses].[id],*

*[Move in Survey Responses].[Move in experience 1-10],*

*[Move in Survey Responses].Email,*

*[Move in Survey Responses].[Help received selecting home satisfaction 1-10],*

*[Move in Survey Responses].[Survey sent time],*

*[Move in Survey Responses].[Condition of property 1-10],*

*[Move in Survey Responses].[What could Grainger do to improve the move in experience],*

*[Touchpoint - Move in].[Contact ID 18 Digit],*

*[Touchpoint - Move in].[18 digit OPP ID],*

*[Touchpoint - Move in].[First Name],*

*[Touchpoint - Move in].[Last Name],*

*[Touchpoint - Move in].[Title],*

*[Touchpoint - Move in].[Tenancy End Date],*

*[Touchpoint - Move in].[Tenancy Start Date],*

*[Touchpoint - Move in].[Role],*

*[Touchpoint - Move in].[Phone],*

*[Touchpoint - Move in].[Unit Address \_Subject\_],*

*[Touchpoint - Move in].[Active],*

*[Touchpoint - Move in].[Tenancy Type],*

*[Touchpoint - Move in].[Primary Offer Estate],*

*[Touchpoint - Move in].[Move-In Date],*

*[Touchpoint - Move in].[Agreed Unit]*

*from [Move in Survey Responses]*

*INNER JOIN [Touchpoint - Move in] ON [Move in Survey Responses].[Email] = [Touchpoint - Move in].[Email]*

# Appendix B: Interactive Content Blocks

Each interactive content block is a ‘Email Form’ block in Content Builder > Touchpoint Surveys along with the email templates that contain them.

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Each Survey requires a CloudPage, to act as a fall back option and manage the submission. These are held in Webstudio>CloudPages>Collections>Touchpoint Surveys.

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