< SERVICE TOOLS (/ONLINE-COURSES/SERVICE-TOOLS)

# Managing feedback



ARTICLE | Additional reading 15 min.

The following Creatio settings are required to start processing feedback from your customers:

1. Set up the customer satisfaction scale.
2. Set up how the feedback affects a case life cycle.
3. Set up feedback channels.
4. Edit the wording of your feedback request.
5. Set up the time and frequency of feedback processing.

Let's take a closer look at each step.

## Scale setup

Customer satisfaction scale setup is unified, its format does not depend on the feedback channel. You can configure:

The number of satisfaction levels. For instance, if you use CES, set up a 7-point scale. If you prefer CSAT, use 3- or 2-point scale instead.

Visualizing customer satisfaction levels for the most intuitive and simple grading. Make sure you add an image that best illustrates each of the satisfaction levels. For best analytics, each level must correspond to a natural number.

The configuration of the user feedback scale can be done in the “Satisfaction levels” lookup.

More information is available in the following article on Creatio academy: User satisfaction scale setup (https://academy.Creatio.com/documents?product=service%20enterprise&ver=7&id=1785)

## Setting up how customer satisfaction affects a case life cycle

Creatio automatically sends a customer feedback request once a case status changes to “Resolved”. After this, the customer can evaluate the quality of service. The received grade will affect the case life cycle.

For example, after the case has been resolved, the customer opens the customer portal and grades the quality of service positively (by default, the positive grades are “Very satisfied”, “Satisfied”, and “Neutral”). As a result, Creatio automatically closes the case. The grade becomes available on the case page for support employees.

If the customer grades the quality of service negatively, the case will be reopened.

**Note**

Based on the customer feedback, cases may be reopened for a number of other reasons: If an email or a portal message has been received from the customer after the case had been resolved. An employee may reopen a case manually, using the stage panel. Such reopening of cases is covered in the “How to process cases” module.

You can modify the life cycle logic based on the received feedback using the “Satisfaction levels” lookup.

For example, you can set the system up in such a way, that the “Neutral” grade would reopen the case instead of closing it.

Whenever a case is reopened, the “Assignee” field is cleared, and the case itself is put back into the processing queue. To disable clearing of the “Assignee” field, clear the “Default value” checkbox in the “Remove case assignee after case reopening” system setting.

## Setting up feedback channels

In Creatio, we use two primary feedback channels:

1. Email.

2. Customer portal.

These two channels can be used concurrently. Both channels may be available for a customer, but once the customer replies on one channel, the other becomes irrelevant for the current case.

To use email as a feedback channel:

1. Link a mailbox. More information on how to do this in Creatio is available in a separate module.

2. Set up a mailbox for sending email notifications. This setup is covered in a separate module.

Create a portal user to use the self-service portal as a feedback channel.

More information is available in the following article on Creatio academy: How to register a portal user (https://academy.Creatio.com/documents?product=service%20enterprise&ver=7&id=1791)

## Setting up questions for gathering customer feedback

The wording of the question depends on the feedback gathering methodology.

For instance, in CSAT, the question can be as simple as “Are you satisfied with the quality of service?” In CES, on the other hand, your objective is to find out how easy was the process of obtaining the service from the customer’s perspective.

Use the “Email templates” lookup to set up feedback requests. This lookup stores all templates for all notifications sent during the processing of cases. Customer feedback requests are sent according to the “Case feedback request notification” template.

In Creatio, feedback forms are edited as email templates.

More information is available in the following article on Creatio academy: Setting up email templates (https://academy.Creatio.com/documents?product=service%20enterprise&ver=7&id=1784)

## Setting up the time and frequency of gathering feedback

It is better to start the initial survey as soon as possible after the case has been resolved, but with a slight delay so that the client has time to evaluate the quality of the provided solution.

If the customer does not respond to the initial feedback request, you can send a polite reminder. This will increase feedback conversion.

You can set up delays between repeated feedback requests in the “Case notification rule” lookup.

The time frame for repeating feedback requests you can configure in the system settings.

Use the “**Number of waiting days to reevaluate resolved case**” system setting to set up the time after which Creatio will repeat a feedback request. If the customer does not provide feedback after the second request, Creatio will wait for the number of days specified in the “**Number of waiting days after the second reminder of resolved case**” system setting before closing the case without feedback.

More information is available in the following article on Creatio academy: Set up contact case notification rules (https://academy.Creatio.com/documents?product=service%20enterprise&ver=7&id=1783)

## Viewing gathered feedback

**The customer’s grade** and the comment that the customer leaves on the “thank you” page are displayed on the “Closure and feedback” tab of the case page.

**General feedback indicators** are available on the “Feedback” tab in the “Dashboards” section.

**Access to editing the received customer feedback** is configured via the “Ability to change case satisfaction level” system operation. By default, permissions to edit the feedback is granted to the portal users. Company employee users are restricted from modifying customer feedback to ensure the objectivity of the stored data. If necessary, you can provide access to modifying the feedback to the support service supervisors.

NEXT STEP

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