

CSAT Survey + Follow-Up Workflow

Sample CSAT Survey

Subject: We'd love your feedback!

Body:

How satisfied were you with your recent experience?

[1] [2] [3] [4] [5]

(1 = Very Dissatisfied | 5 = Very Satisfied)

Optional Question:

What could we have done better? (Open text field)

Follow-Up Workflow

If Score = 4 or 5 (Positive):

Send Thank You Message + Reinforce Value:

'Thanks for your feedback! We're so glad you had a great experience. If you ever need support, we're here for you.'

If Score = 1-3 (Neutral/Negative):

Send Follow-Up + Offer Human Support:

'We noticed your experience didn't meet expectations. We'd love to make it right - can we connect?'

How to Use in a Portfolio Project

- Add a 'CSAT Survey + Response Plan' tab to your dashboard file
- Create a slide or PDF attachment with this workflow
- Mention in your Insights: 'Recommend launching automated CSAT survey post-support, with follow-up playbook based on score.'