

Survey options in SFMC

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0. Overview

There are multiple options how we can setup a survey for markets. Every option has different possibilities and behaviour.

1. Surveys in Marketing cloud (legacy + organic)

- Answers are stored only in MC by default (they are not pushed to CDP or for market automatically). Market will not have an access to answers automatically, only if we will do export from MC to AWS S3 bucket via export automation in MC.
 - It is possible to export these data automatically (on a daily basis) to CDP with mapping as well (must be requested by market on a survey level).
- **3 options:**
 - **A) Static buttons in email:** we can have multiple buttons (CTA) with unique alias (answer1, answer2...) and customer can click on **one** of those options (one question answer survey). He will be redirected to MC cloud page (thank you for participation) and answer will be stored as regular click (available in CDP and in PowerBi).
 - Documentation: https://help.salesforce.com/s/articleView?id=sf.mc_ceb_interactive_email_form_block.htm&type=5
 - **Display limitations:** https://help.salesforce.com/s/articleView?id=sf.mc_ceb_interactive_email_form_client_support.htm&type=5
 - **B) Dynamic form in email:** special block with form (inputs, radio buttons, multiple option...) is integrated in email (multi question/answer survey). Customer can select multiple answers and then submit entire form. Redirection to MC Cloud page (thank you page). **Be aware** that this email form is not displayed properly across all Email clients.
 - Documentation: https://help.salesforce.com/s/articleView?id=sf.mc_ceb_interactive_email_form_block.htm&type=5
 - **Display limitations:** https://help.salesforce.com/s/articleView?id=sf.mc_ceb_interactive_email_form_client_support.htm&type=5
 - **C) Survey on Cloud page:** we can build custom survey on MC Cloud page - customer will have access via link shared via email/SMS (wide options for behavior/design).
 - Examples:
 - DE - At Risk - 1 question only: https://cloud.e.iqos.com/de_atrisk_survey
 - ES - Educated awarness - 7 questions (true false): https://cloud.e.iqos.com/es_category_educated_awareness_journey_form
 - FR - Science survey - 6 questions: https://cloud.e.iqos.com/fr_science_survey

2. Surveys in Service cloud (organic)

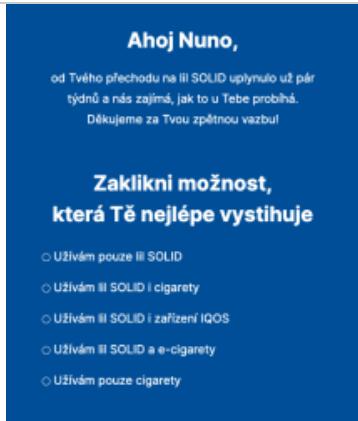
- **Update (4.6.2024)**
 - **The position set by IT is that survey activations can proceed, but markets must be informed that a charge (\$186 per 1,000 survey responses) might be applied to the feature if consumption goes over a threshold, which is yet to be defined. A communication to this effect should be sent to markets tomorrow. Exception markets are CZ, SK and EG - their volume is already very high and IT are trying to secure a transfer of budget from them to cover the costs. We are already in active discussion with them on this topic though.**
- This is currently recommended approach from global teams as answers are available to everyone (MC/CDP/ market) and can be used for additional purpose (segmentation, reporting...).
 - Answers are stored in survey outcome table (from TD as well as synced DE from SC).
- For the request (brief) market needs to provide all required information: name of survey, all Qs/As in english+local language with related master IDs from the master list.
- Global SC component is used for survey creation used by us (MOS). All answers are going to CDP and to MC via TD.
- List of global campaigns and Qs/As: [Survey Master Question and Master Answer Mapping](#)
- **Two options** how to submit survey from SFMC:
 - A) Agent will submit the form during the call with customer (MOS will create a survey and outbound call - case + task if required).
 - B) Customer will submit the form by himself based on the link received via email/SMS from MC (survey invitation object).
- There is third use case how the survey can be used - inbound call (customer calls CSC).
- There are global campaigns mentioned in presentation attached to the [documentation](#). **Which survey to use**, there are 2 options:
 - A) If market wants to use a global survey (all Q/A will be the same) then we (MOS) will do a translation to local language (from global English version) - no new survey is created (all master Q/A are used).
 - B) If market wants to have some questions/answers different then it will be done as local survey.

3. Additional resources

- How to create case, task, invitation object, mapping, matrix: [How to create Service Cloud Case/Call](#)
- Global doc for SFDC surveys (mapping, matrix...): [User Guide for Surveys and Campaigns](#)
- SFMC survey answers export to CDP: [Global export - Survey results](#)
- Master questions and answers: [Survey Master Question and Master Answer Mapping](#)

4. Examples

- **1A Static buttons:**



- 1B Email form:

How satisfied were you with the support you received?

☆ ☆ ☆ ☆ ☆

Was your issue solved in a timely manner?

Yes No Prefer not to answer

Additional comments (optional)

SUBMIT SURVEY

- 1C Cloud page:



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**¿EL TOMATE Y LA PATATA
CONTIENEN NICOTINA?**

VERDADERO

FALSO

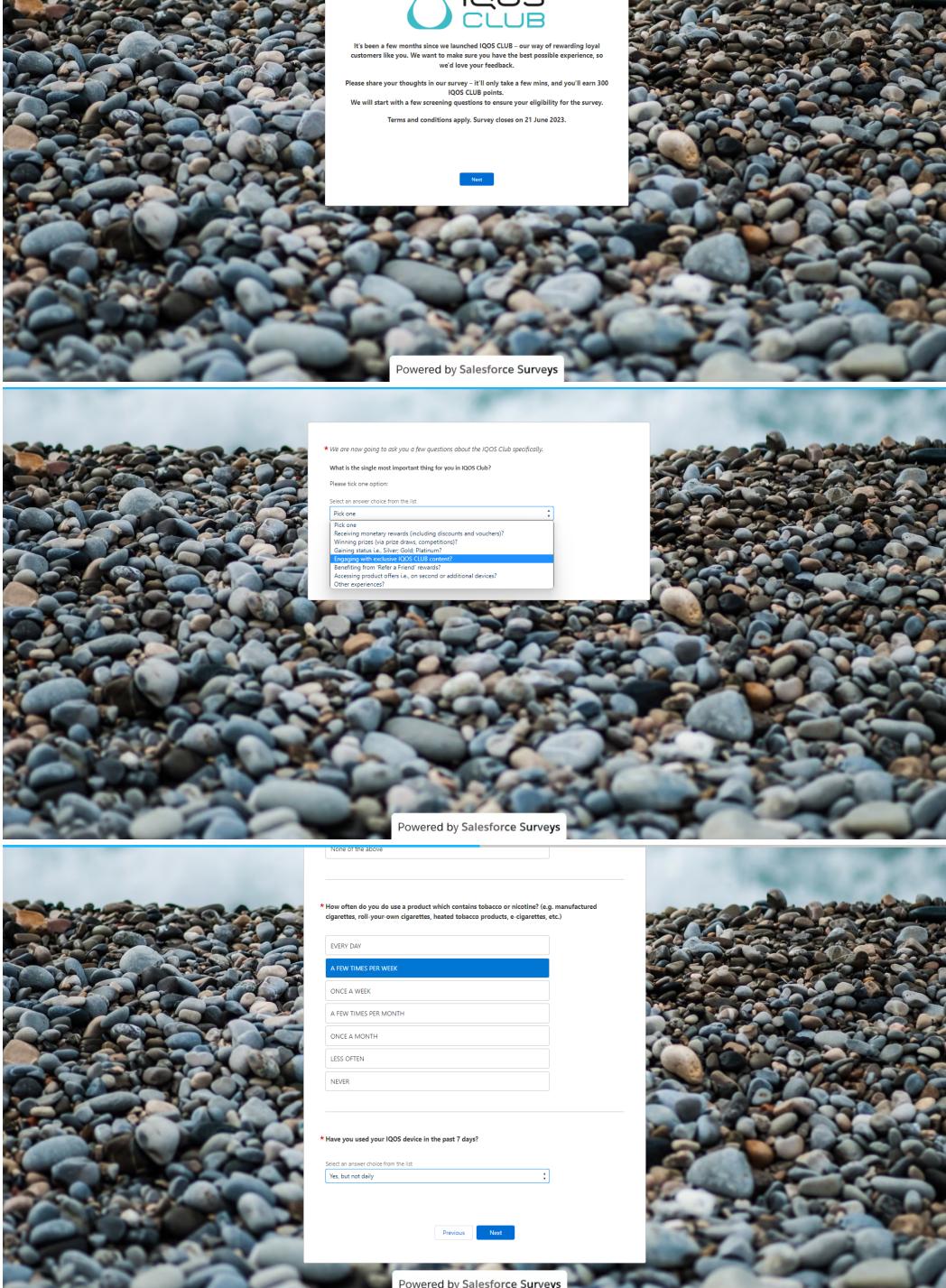
Información importante: IQOS no está exento de riesgo y
está dirigido únicamente a adultos. Su uso libera nicotina,
que es adictiva.

○

- **2 Survey in Service Cloud (SFDC survey):**

The image shows a survey interface from Service Cloud. The background is a close-up photograph of a beach covered in small, blue-grey pebbles. Overlaid on the left side is a white survey form with several questions:

- * Please confirm your year of birth.**
Survey is valid only for consumers with age higher than 20.
Select a value:
1950-2007 1993
- * Are you...?**
Select an answer choice from the list:
- * Do you work or study in the following industries?**
Please tick one option:
 Banking / finance industry
 Insurance
 Advertising / public relations
 Marketing
 Market research
 TV / radio / newspapers / magazines
 Legal profession



The image shows three screenshots of a survey interface from IQOS CLUB, overlaid on a background photograph of a pebble beach. The survey consists of three pages:

- Page 1:** A welcome message from IQOS CLUB asking for feedback. It includes a brief description of the survey, a promise of 300 IQOS CLUB points for participation, and a note about screening questions. A "Next" button is at the bottom.
- Page 2:** A question asking what is the single most important thing for IQOS Club members. The options are:
 - Pick one
 - Receiving monetary rewards (including discounts and vouchers)?
 - Winning prizes (e.g. price draws, competitions)?
 - Gaming status (e.g. Silver, Gold, Platinum)?
 - Engaging with IQOS CLUB content?
 - Accessing product offers (e.g. on-second or additional devices)?
 - Other experiences!A "Powered by Salesforce Surveys" badge is visible.
- Page 3:** Two questions:
 - "How often do you use a product which contains tobacco or nicotine? (e.g. manufactured cigarettes, roll-your-own cigarettes, heated tobacco products, e-cigarettes, etc.)" with options: EVERY DAY, A FEW TIMES PER WEEK (selected), ONCE A WEEK, A FEW TIMES PER MONTH, ONCE A MONTH, LESS OFTEN, NEVER.
 - "Have you used your IQOS device in the past 7 days?" with options: Yes, but not daily (selected).A "Powered by Salesforce Surveys" badge is visible.

5. Mapping

- **It is mandatory to map questions and answers in all new surveys (last update - 14.5.2024):**
 - For all DCE2 markets in case of SFDC surveys

- **Description:**

- If questions and answers are not mapped in SFDC or in SFMC (in case of export to CDP) to Global IDs (global questions and answers) data in CDP are then in local language (market language) without global unique IDs. That means that these data can't be used by global teams as they are not able to identify them (understand the meaning of questions/answers). Otherwise it could be used for automated segment creation.

- **Process:**

- If market would like to create a new survey they need to check all questions and answers in master list and get **English translations** and **Global IDs**: [Survey Master Question and Master Answer Mapping](#)
 - Then:
 - **A)** If global IDs are provided for all Qs/As - MOS can proceed with survey creation in SFMC/SFDC.
 - **B)** If global IDs are missing for some Qs/As - Market needs to reach out to Global team (jemilen.indab@pmi.com). It will be checked internally if those questions don't need to be mapped (local Q/S) or new global Q/A will be created.

No labels