Preview feature: Get feedback with Voice of the Customer surveys

Microsoft Dynamics CRM Online

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Microsoft Dynamics CRM

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Preview feature: Get feedback with Voice of the Customer surveys

Create and send out Voice of the Customer surveys to get feedback from your customers about your products or services. Respondents can take the surveys on a phone, tablet, or computer.

Survey responses become part of a customer's record, so you can see the customer's feedback history as you work a sale or resolve a service case.

Survey analytics help you use customer feedback to identify gaps in service, run targeted marketing campaigns, and send offers to increase sales.

Voice of the Customer is available as a preview feature to organizations that use Microsoft Dynamics CRM Online 2016 Update. A preview feature is a feature that isn't complete, but is made available before it's officially in a release so customers can get early access and provide feedback. Preview features should be used only in test and development environments and may have limited or restricted functionality.

Important

Microsoft doesn't provide support for this preview feature. Microsoft Dynamics CRM Technical Support won't be able to help you with issues or questions. Preview features aren't meant for production use and are subject to a separate supplemental terms of use.

Install the Voice of the Customer solution

Voice of the Customer is a preferred solution that you install from Office 365. To learn how to install preferred solutions, see TechNet: Install a preferred solution.

Upload images to use with your surveys

Before you can add a logo or other images to Voice of the Customer surveys, you need to upload the images to CRM.

1. From the menu, go to **Voice of the Customer > Images**.
2. Click **New**.
3. Fill out the **Name** and **Image Title** fields.
4. Click **Save** to save the record so you can upload an image and add other information.
5. Under **Custom Icon**, in the **Upload your image to remote server** field, click **Browse**, select the image you want to upload, and click **Submit**.
6. Click the **Save** button on the bottom right corner of the screen.

Design a theme for your survey

Themes define the color scheme for your Voice of the Customer surveys. You can design multiple themes if you want to use different ones for other surveys.

1. From the menu, go to **Voice of the Customer > Themes**.
2. Click **New**. Or, if you want to edit the default theme, click **Default** in the list of themes.
3. Fill out the **Name** field.
4. Adjust the survey's color values by specifying the hexadecimal value for each part of the survey (for example, the hex value for blue is #0000FF). W3schools provides a handy reference chart for hexadecimal color values. Click a hex value in the chart to see a chart with corresponding RGB values (for example, the RGB value for blue is 0, 0, 255).
5. If you want, add custom CSS instructions under **CSS** (optional).
6. Click **Save**.

Plan your survey

Before configuring your survey questions, it's helpful to plan ahead. Here are a few things to think about to help you design the right questions for your survey:

- What's the purpose of your survey? For example, you might want to measure something (like customer satisfaction), interact with your customers, or promote new products or services. If your goal is to measure, what exactly do you want to measure?
- How do you want to use the data you gather? For example, you might want to generate reports to analyze the success of a product or service, use the responses to generate new leads, or determine demand for a new offering.
- How long do you want the survey to be? Keep in mind that longer surveys tend to have higher abandon rates. A good rule of thumb is to keep surveys shorter than five minutes, or no longer than 10 questions (depending on the type of question you ask).
- Should all of your respondents answer all of the questions, or do you want to offer a subset of questions to some respondents?
- Can you reuse all or part of an existing survey?
- Do you want to analyze results from multiple surveys at once? You can do this by linking questions across surveys.
- How do you want to send invitations to your survey? For example, you might want to email them or post an invitation to your website.

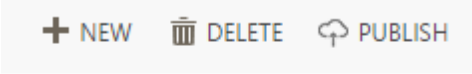
In addition, consider these recommendations to help you improve survey response rates:

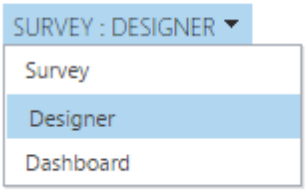
- Send the survey with a named contact from your organization, preferably one that your respondents know.
- Add an image of the contact from your organization to the survey.

Design your survey

Once you've uploaded your images to CRM, designed at least one theme, and made any planning decisions, it's time to design your Voice of the Customer survey.

1. From the menu, go to **Voice of the Customer > Surveys**.
2. Click **New**.
3. Enter information in the **Summary** area and click **Save** to create the survey record so you can continue designing your survey.
4. In the **Survey Runtime** area, specify the theme and logo image you want to use. Also set the values for header and footer text, navigation, and other options. If you need extra help, hover over any field to read the tooltips.
5. In the **Invitations and Actions** area, specify values for each field. If you need extra help, hover over any field to read the tooltips.
6. Edit the items in the **Advanced** and **Feedback** areas as necessary.
7. When you're done editing information about the survey, click **Save**.
8. In the **Survey** drop-down box, click **Designer**.





9. Edit each page of your survey. Here are some of the actions you can take:
    - To change pages, click a page on the left side of the survey designer.
    - To edit an item on a page, hover over the item and click one of the editing buttons that appear to the right of the item. If you need extra help, hover over an editing button to read the tooltips.
    - To add a page, click the page button at the bottom of the left side of the survey designer.
    - To add a question, drag the type of question you want from **Survey parts** to the location you want on the survey page. If you need extra help, hover over a survey part to read the tooltips.
      Note: The drag-and-drop functionality only works with a mouse or other pointing device. It's not supported through touch on devices with touch screens, such as tablets.
10. To save your work, click the **Save** button on the bottom right corner of the screen.
11. When you're done editing your survey, click **Publish**. Once it's published, you can do the following:
    - To step through your survey, click **Test**.
    - To preview your survey, click **Preview**.
    - To create a copy of your survey, click **Clone**.

- To export translations, click **Export translations**. You can then access the resulting Translations.xml file from the **Summary** area of your survey.
- To copy snippets to use elsewhere in this survey or other surveys, select the snippet (survey part or text) you want to copy, click **Copy snippet**. If you want to copy a face, rating, or NPS snippet, click **MORE COMMANDS** (**…**) and then click the action you want to do.
- To stop this survey from running, click **Stop**.

Distribute a survey

You can invite respondents to take part in a survey in different ways, depending on how you want to send the invitation out, whether you want non-anonymous responses, and whether you want to pipe data to the survey.

Surveys can be:

- **Anonymous** CRM doesn't know who the respondents are. You can distribute a link to the survey using email, social sites like Twitter or Facebook, or other webpages.
- **Non-anonymous** You send survey invites to specific contacts, accounts, or leads in CRM.

The following table describes how you can send invitations, available triggers, and CRM responses.

	Media	Trigger	Invitations can be piped	Response in CRM	Comments
Anonymous	Any	Any	No	Create lead	
Email template	Email	Direct email Workflow Campaign Quick campaign Email merge Manual email	Yes	Account Contact Lead Regarding	Need to create an email template for each survey.
Email	Email	Workflow Campaign Quick campaign Manual email	Yes (for workflows)	Account Contact Lead Regarding	
Invitations only	For subsequent use with any media	Any	Yes (for workflows)	Account Contact Lead Regarding	Useful for integration with third-party email providers.

Anonymous

If you configure your survey to allow anonymous respondents, you can copy the survey URL and paste it from the survey to the medium you want to send it with. You can send it in email, post it on social media sites like Twitter or Facebook, or publish it on your website.

To embed the survey in an iFrame on your website, copy and paste the HTML from the **IFrame URL** field on the survey. Choose **Run in IFrame** to remove the header and footer elements of the survey.

CRM doesn't associate responses with a customer record in CRM. If you want to create a lead from an anonymous response, set **Create Lead For Anonymous Responses** to **Yes**.

Non-anonymous

For non-anonymous surveys, the link you send to respondents is specific and unique for each customer. CRM generates the URLs for you to use when you create a survey invitation or embed the survey snippet in an email. You can use the email snippet in the survey's **Email Snippet** field.

When you copy the email snippet from the survey and paste it to an email within CRM, CRM converts the snippet from its GUID form:

[Survey-Snippet-Start]73379cd2-77b4-e511-8112-00155d0a190d[Survey-Snippet-End]

to a link with the link text you specify in the survey's **Invitation Link Text** field, such as:

Click here to take the survey.

View survey dashboards, reports, and results

The survey dashboard gives you an overall view of your survey's progress at a glance. For more information about specific metrics, you can run the following Voice of the Customer reports:

- Net Promoter Score
- Survey Export
- Survey Summary

View a survey dashboard

1. From the menu, go to **Voice of the Customer > Surveys**.
2. Select a survey from the list.
3. Click the **Survey** drop-down box and click **Dashboard**.

Run a report

1. From the menu, go to **Voice of the Customer > Surveys**.
2. Select a survey from the list.
3. Click **MORE COMMANDS** (**…**), click **Run Report**, and then click the report you want to run.

View survey responses

You can view Voice of the Customer survey responses to see an individual's answers.

1. From the menu, go to **Voice of the Customer > Survey Responses**.
2. Click the survey response you want to view.

If you want to add a survey response to a customer service queue, click **Add to queue**. For more information about queues, see Create or edit a queue.

View survey response outcomes

You can view the response outcomes for Voice of the Customer surveys.

1. From the menu, go to **Voice of the Customer > Response Outcomes**.
2. Click the response outcome you want to view.

Translate or localize your survey

Once you've created your survey, you can translate it to other languages.

1. From the survey you want to translate, open the Translations.xml file under **Translations** in the **Summary** area.
2. When asked to open or save the file, click **Save** and specify the location to save it to.
3. Open the file in Excel.
4. Add a column to the right of the base language (for example, **en** for English) and specify the language or locale for the language in the column's header (for example, **es** for Spanish). You can also specify a locale in the header (for example, **en-uk** for English in the United Kingdom). Add columns for each language or locale you need.
5. Add translations to each language or locale column. You can retrieve translations from Bing translations. If your text strings have HTML in them, you'll need to encode them. For example, you need to encode:

   Hello!

   as:

   Hello!

   You can use any HTML encoder. For example:
   - http://www.opinionatedgeek.com/DotNet/Tools/HTMLEncode/Encode.aspx
   - http://www.web2generators.com/html/entities
6. Once you've completed your translations, save the file and go back to CRM and click the **X** next to the survey's Translations.xml file.
7. Click **Attach** and select your new translations file.

If you add or change a question after adding your edited translations file, you need to add the translation for that question. To get an updated version of the questions, click **Export translations** on the survey screen and repeat these steps to add your new translations.

Note: CRM automatically detects the language at run time, based on the respondent's browser preferences. If there isn't a translation for that language, the survey uses the base language strings instead.

Privacy notice

By enabling the Voice of the Customer feature, when you publish a survey from within Microsoft Dynamics CRM, the survey definition will be sent to Azure and stored in Azure Storage. When a respondent submits a survey (by opening the survey invitation link sent to him or her via email), the survey responses are stored temporarily in the Azure Service Bus and then are retrieved and stored in Microsoft Dynamics CRM. After the responses have been stored in Microsoft Dynamics CRM, they are deleted from Azure.

Note that it is possible to include CRM data such as customer name, product name, case number, etc. in a survey (within survey elements such as questions, answers, etc.) when rendering a survey for a respondent. When a survey invitation link is generated, this CRM data would be sent out of CRM and stored in Azure SQL Database in exchange for an identifier that is used within the survey invitation link. This identifier is used to show the CRM data within the survey after the survey is opened using the survey invitation link. The identifiers within the survey link that is sent over email to a respondent is stored in the respondents' email system.

An administrator can enable the Voice of the Customer feature by installing it as a solution in the Microsoft Dynamics CRM organization. In addition, an administrator can subsequently disable the feature by uninstalling this solution from the Microsoft Dynamics CRM organization.

Azure components and services that are involved with Voice of the Customer functionality are detailed in the following sections.

Note: For more information about additional Azure service offerings, see the Microsoft Azure Trust Center (https://azure.microsoft.com/en-us/support/trust-center/).

Cloud Services (https://azure.microsoft.com/en-us/services/cloud-services/)

Designer Service (Web Role)

This provides multiple Web Services for communication between a CRM organization and the multi-tenanted Voice of the Customer Azure components. For example, surveys are published and stored to Azure Blob Storage. Survey responses are retrieved from an Azure Service Bus queue and returned to be persisted in the CRM organization. All requests are authenticated against Azure Active Directory.

Survey Runtime (Web Role)

This is the web application that serves the surveys to the respondents. Submitted survey responses are stored temporarily on an Azure Service Bus queue before being processed retrieved by a CRM asynchronous service.

Response Processor (Worker Role)

Worker role is responsible for processing the raw completed surveys into valid survey responses that can be created in CRM.

Azure Key Vault (https://azure.microsoft.com/en-us/services/key-vault/)

All cloud services store configuration data in Azure Key Vault. Organization, tenant data is stored in SQL Azure.

Azure SQL Database (https://azure.microsoft.com/en-us/services/sql-database/)

Voice of the Customer uses SQL Azure to store:

- Piped data
- Survey metadata
- Organization (tenant) data

Azure Blob Storage (https://azure.microsoft.com/en-us/services/storage/**)**

Survey definitions and partially completed (saved) responses are stored to Azure Blob storage.

Azure Content Delivery Network (CDN) (https://azure.microsoft.com/en-us/services/cdn/)

The Voice of the Customer solution uses Azure Content Delivery Network to serve static content to the survey runtime such as images (including uploaded images such as customer logos), JavaScript and CSS.

Azure Active Directory (https://azure.microsoft.com/en-us/services/active-directory/)

The Voice of the Customer solution uses Azure Active Directory Service to authenticate web services.

Azure Service Bus (https://azure.microsoft.com/en-us/services/service-bus/)

Messages created when a survey is displayed / submitted are stored temporarily to an organization's (tenant's) Azure Service Bus Queue until an asynchronous job in an organization's CRM pulls the responses from the queue and persists as CRM entity records.