



The Complete Guide to **BUILDING YOUR FEEDBACK FOUNDATIONS**

Siloed feedback leads to missed opportunities, lost revenue, and misaligned teams. This guide provides a step-by-step framework for building strong feedback foundations by centralizing feedback in Salesforce, ensuring every Go-To-Market (GTM) function operates with real-time insights. Whether you're starting from scratch or optimizing an existing process, you'll learn how to implement a scalable, full-funnel feedback strategy that drives measurable growth.

Whether starting from scratch or looking to optimize existing feedback processes, this guide provides the frameworks, best practices, and implementation strategies needed to transform how your organization collects, analyzes, and acts on customer feedback.

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A Commitment to Lifecycle Feedback

What Is Lifecycle Feedback?

Lifecycle feedback is a strategic approach to collecting, analyzing, and actioning customer insights across the entire customer journey—from initial awareness through purchase, adoption, and advocacy. Traditional feedback programs focus on isolated touchpoints, leading to blind spots. A lifecycle feedback approach ensures insights flow across marketing, sales, and customer success—powering retention strategies, reducing churn, and enabling smarter decision-making.

Why Traditional Feedback Approaches Fall Short

Without strong feedback foundations, most organizations struggle with feedback collection that is:

- **Disconnected:** Different departments use different tools and methodologies
- **Inconsistent:** Measurement approaches vary across teams
- **Reactive:** Feedback is collected after problems arise
- **Siloed:** Insights don't flow between departments

These limitations create blind spots in customer understanding and prevent organizations from delivering cohesive experiences across touchpoints.

Better Insights. Better Outcomes.

Organizations that implement feedback programs that align teams around the same customer insights have the opportunity to:

- **Drive Higher Revenue Growth**
- **Improve Customer Retention**
- **Accelerate Innovation**
- **Experience Higher Employee Satisfaction**

These are the outcomes of better decision-making enabled by comprehensive customer insights that span the entire journey.

The Feedback Foundations Framework

The Four Pillars of Feedback Foundations

A robust full funnel feedback program is built on four essential pillars:

1. Strategic Alignment

- Shared objectives across departments
- Executive sponsorship and governance
- Clear ownership and accountability

2. Unified Infrastructure

- Centralized data architecture
- Integrated technology stack
- Standardized collection methodologies

3. Actionable Insights

- Real-time analytics and reporting
- Insight distribution mechanisms
- Closed-loop feedback processes

4. Continuous Optimization

- Regular program assessment
- Iterative improvement cycles
- Performance benchmarking

Centralizing Feedback in Salesforce

Organizations that build their feedback foundations in Salesforce unlock significant advantages—ensuring a centralized environment and real-time insights that drive retention and revenue growth. Other advantages include:

- **Single Source of Truth:** All customer data and feedback in one place
- **Enhanced Security:** Leveraging existing security protocols
- **Seamless Integration:** Native connection to customer records
- **Workflow Automation:** Built-in process automation capabilities
- **Cross-Functional Visibility:** Unified reporting across departments

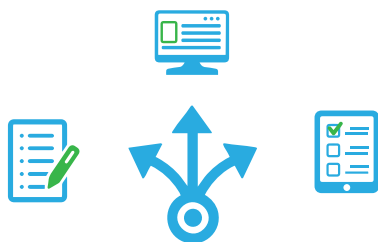
A unified infrastructure eliminates data silos, enabling every department to access the same customer insights—leading to 23% higher customer retention and faster revenue growth.

Implementation Roadmap



Phase 1: Establishing Your Feedback Foundations

- Understand the current state of your customer feedback initiatives
- Identify the stakeholders in your organization that benefit from feedback alignment
- Map out the feedback that is most important to your organization
- Understand how your technology will work together to make the most of your feedback insights
- Determine baseline metrics and goals for your feedback program.



Phase 2: Initial Deployment

- Work with stakeholders to determine what feedback touchpoints will bring your organization the most value
- Determine the actions you want to take when feedback data is collected
- Outline the data you want to collect
- Determine how you will ask for the feedback
- Build workflows to take action on the data
- The Feedback Foundations are a great place to get started.

THE 8 MOST IMPORTANT FEEDBACK TOUCHPOINTS THAT MAKE UP YOUR FEEDBACK FOUNDATION:

Introduction

For feedback to drive real business outcomes, it must be accessible to every GTM function—not just the team collecting it. Without proper integration and cross-functional alignment, insights get lost, action is delayed, and customer needs go unmet. By centralizing feedback in Salesforce, Survey Vista ensures that customer insights seamlessly flow between marketing, sales, and customer success—creating accountability and driving real-time decision-making. This is a collection of the most common feedback touchpoints across your customer journey that align your GTM organization. Each section of this action plan outlines key questions to include, best practices to follow, and implementation strategies to get you started with your Feedback Framework.

1. Initial Lead Capture

Purpose: Gather baseline information about prospects to capture interest from leads.

Key Questions to Include:

- Who are you?
- What are you interested in?
- How did you hear about our company/product?

Best Practices:

- Keep the form short (5-7 fields maximum)
- Make only essential fields required
- Include dropdown options for standardization where appropriate
- Progressively capture data across touchpoints instead of all at once
- Enable auto-population of known data (e.g., email, company)
- Include a privacy statement about how data will be used

Implementation Actions:

1. Integrate lead capture forms with Salesforce as the central repository
2. Create scoring rules to qualify leads based on responses
3. Set up automated routing based on lead source and characteristics
4. Establish baseline metrics for conversion rates by source
5. Test form variations to optimize completion rates

2. Level of Interest & Qualification Form

Purpose: Assess prospect readiness and qualification after initial engagement.

Key Questions to Include:

- What specific challenge are you looking to solve?
- What is your timeline for implementing a solution?
- What is your role in the decision-making process?
- What solutions have you tried or considered previously?
- What are your top 3 priorities in selecting a solution?
- What is your expected budget range for this solution?
- Who else is involved in the evaluation process?
- What is your expected implementation timeline?
- Which features/capabilities are most important to you?
- What would successful implementation look like for your organization?

Best Practices:

- Trigger this form after meaningful engagement (request for a demo)
- Use conditional logic to show relevant questions based on previous answers
- Include questions that align with your qualification framework (BANT, MEDDIC)
- Balance between gathering information and respecting the prospect's time
- Offer value in exchange for providing information (relevant content, consultation)

Implementation Actions:

1. Define your qualification criteria and scoring model
2. Create branching logic based on industry, company size, and use case
3. Set up automated notifications for sales when qualification thresholds are met
4. Design follow-up sequences based on qualification level
5. Establish feedback loops to refine qualification criteria over time

3. Win/Loss Analysis

Purpose: Understand factors influencing purchase decisions to improve sales effectiveness and product strategy.

Key Questions to Include:

- How would you rate your overall experience with our sales organization?
- What were the primary factors in your decision?
- How would you rate our solution compared to alternatives you considered?
- What aspects of our sales process worked well/could be improved?
- What features were missing or inadequate in our offering?
- How did our pricing/packaging compare to alternatives?
- What could we have done differently to win your business? (for losses)
- What ultimately convinced you to choose our solution? (for wins)

Best Practices:

- Conduct within 1 week of decision while memory is fresh
- Combine surveys with selective follow-up interviews for depth
- Share anonymized insights across product, marketing, and sales teams
- Create a systematic process for incorporating feedback into strategies

Implementation Actions:

1. Create separate win and loss survey templates in Salesforce
2. Set up automated triggers when opportunities are closed (won/lost)
3. Establish a monthly cross-functional review of win/loss data
4. Develop a categorization system for reasons won/lost
5. Create dashboards showing win/loss trends by product, segment, competitor
6. Implement a process to validate sales rep perceptions with customer feedback
7. Escalate and alert sales managers if the overall experience scores are low

4. Onboarding Form: Sales to Customer Success Handoff

Purpose: Ensure smooth transition from sales to customer success with complete context and expectations.

Key Questions to Include:

- What specific outcomes is the customer expecting to achieve?
- What timeline has been communicated for implementation and value realization?
- What potential challenges or risks were identified during the sales process?
- Who are the key stakeholders and their roles in implementation?
- What promises or commitments were made during the sales process?
- What competitive alternatives did they consider and why did they choose us?
- Are there any unique requirements or customizations needed?

Best Practices:

- Populate for values with data from Salesforce collected during the sales process
- Include input from the customer to validate expectations
- Make this a required step in the sales-to-CS handoff process
- Review the insights with the customer during kickoff
- Update as new information emerges during onboarding
- Use this as a reference point for success metrics throughout the customer lifecycle

Implementation Actions:

1. Create a standardized handoff template process in Salesforce
2. Build automation to notify CS of new closed-won opportunities
3. Link the onboarding information to the customer health scoring system
4. Create dashboards to track onboarding progress and milestone completion
5. Establish feedback loops to identify gaps in the sales-to-implementation process

5. Support and CSAT (Customer Satisfaction)

Purpose: Evaluate support effectiveness and identify improvement opportunities.

Key Questions to Include:

- How satisfied were you with the resolution of your issue? (1-5 scale)
- Was your issue resolved on the first attempt?
- How knowledgeable was the support representative?
- How would you rate the timeliness of the response?
- What could we have done to improve your support experience?
- Would you like someone to follow up regarding this issue?

Best Practices:

- Keep surveys very brief (3-5 questions maximum)
- Send immediately after ticket resolution
- Include both quantitative ratings and qualitative feedback options
- Follow up on negative ratings quickly (within 24 hours)
- Track trends by support agent, issue type, and customer segment
- Close the loop by sharing how feedback improves support processes
- Include support metrics in overall customer health scoring

Implementation Actions:

1. Integrate support platform with Salesforce for unified data
2. Set up automated survey distribution after ticket closure
3. Create alert workflows for low satisfaction scores
4. Develop dashboards comparing CSAT across product areas and issue types
5. Establish regular reviews of support feedback with product teams
6. Implement service recovery protocols for dissatisfied customers

6. In-Product Feedback Form

Purpose: Capture contextual feedback during product usage to improve user experience and feature development.

Key Questions to Include:

- How easy was it to use this feature? (1-5 scale)
- What were you trying to accomplish?
- Did you encounter any obstacles or confusion?
- What would make this feature/process more valuable to you?
- Would you like to participate in future user research on this area?
- How important is this feature to your overall success with our product? (1-5 scale)

Best Practices:

- Make feedback collection unobtrusive but easily accessible
- Trigger contextual feedback requests at appropriate moments
- Keep forms short and focused on specific features or workflows
- Vary feedback requests to prevent survey fatigue
- Connect feedback to specific user segments and use cases
- Create visible “feedback loops” showing how input drives improvements

Implementation Actions:

1. Push product feedback into Salesforce at the contact level
2. Create logic to trigger specific feedback requests based on user behavior
3. Develop categorization system for feature requests and issues
4. Establish feedback review process with product management
5. Build dashboards showing feedback volume and sentiment by feature area
6. Create notification system for product teams when feedback thresholds are met

7. Referral Request

Purpose: Identify and activate promoters to generate qualified referrals.

Key Questions to Include:

- How likely would you be to refer us to others in your industry? (1-10 scale)
- What specific types of companies would benefit most from our solution?
- Would you be willing to serve as a reference for prospective customers?
- What aspects of our solution would you highlight when referring others?
- Could you provide names of specific individuals who might benefit from our solution?
- What would make you more comfortable referring our solution to others?

Best Practices:

- Trigger referral requests from established, satisfied customers
- Time requests after successful milestones or positive experiences
- Make the referral process as frictionless as possible
- Acknowledge and thank customers for referrals promptly
- Consider incentives for successful referrals where appropriate
- Follow up to inform referrers of outcomes (with permission)

Implementation Actions:

1. Create triggers in Salesforce to identify referral candidates
2. Develop email templates and in-app prompts for referral requests
3. Build tracking system for referral sources and conversion rates
4. Establish a referral acknowledgment and reward process
5. Create dashboards showing referral activity and value generated
6. Implement closed-loop reporting to inform referrers of outcomes

8. Net Promoter Score / Customer Health

Purpose: Measure customer loyalty and identify promoters, passives, and detractors.

Key Questions to Include:

- How likely are you to recommend us to a colleague or peer? (0-10 scale)
- What is the primary reason for your score?
- What could we do to improve your experience with us?
- What features or capabilities do you value most?
- In what ways has our solution helped you achieve your goals?
- What additional capabilities would make our solution more valuable to you?

Best Practices:

- Establish consistent measurement cadence (quarterly recommended)
- Segment results by customer type, product line, and tenure
- Follow up with detractors quickly through appropriate channels
- Create specific playbooks for addressing detractor feedback
- Combine NPS with usage data and other metrics for a comprehensive health score
- Share NPS insights across the organization with specific action items

Implementation Actions:

1. Implement automated NPS collection into Salesforce
2. Create segmentation rules for distributing surveys
3. Develop alert workflows for detractor responses
4. Build trend analysis dashboards by customer segment
5. Establish cross-functional process for reviewing and acting on feedback
6. Create customer health scoring model incorporating NPS and other metrics
7. Implement closed-loop processes for all respondents



BONUS: Quarterly Business Review Feedback Indicator

(Internal Feedback is Important for Growth and Alignment)

Purpose: Assess strategic alignment, validate success metrics, and gather executive-level insights.

Key Questions to Include:

- How well are we helping you achieve your strategic objectives? (1-5 scale)
- What measurable value has our solution delivered in the past quarter?
- What challenges or opportunities do you anticipate in the coming quarter?
- How satisfied are you with our partnership and communication? (1-5 scale)
- What additional support or services would help you derive more value?
- How well are we addressing the needs of different stakeholders/users?
- What would improve your confidence in our long-term partnership?

Best Practices:

- Include questions for different stakeholder perspectives
- Prepare customized questions based on account history and goals
- Focus on business outcomes rather than just product features
- Connect QBR feedback directly to account plans and expansion strategies
- Review historical feedback to demonstrate progress and responsiveness
- Include quantitative ratings and qualitative input

Implementation Actions:

1. Create standardized QBR feedback templates in Salesforce
2. Develop pre-QBR and post-QBR feedback collection processes
3. Build integration between QBR feedback and customer health scores
4. Establish review process for identifying cross-account trends
5. Create dashboards comparing feedback across customer segments
6. Implement workflow to incorporate feedback into account plans
7. Set up automated trend analysis to track improvement over time



Integration and Cross-Functional Alignment

To maximize the value of these feedback touchpoints, consider these additional implementation actions:

1. Create a unified feedback calendar to prevent survey fatigue
2. Establish a cross-functional feedback review committee with representatives from all departments
3. Use Salesforce as a central insights repository accessible to all teams
4. Create standardized reporting templates for sharing feedback insights
5. Implement closed-loop notification systems to inform customers of actions taken
6. Develop training programs to build feedback literacy across the organization
7. Establish clear ownership and accountability for each touchpoint
8. Create metrics to measure the impact of feedback-driven improvements



Phased Implementation Approach

Implementing a full funnel feedback program doesn't happen overnight. A structured approach ensures adoption, maximizes impact, and avoids common pitfalls like survey fatigue or lack of follow-through. Here's how to roll out your program in a way that drives long-term success:

Phase 1: Foundation (1–3 months)

- Implement touchpoints #1, #4, and #5 (Lead Capture, Onboarding, Support CSAT)
- Establish Salesforce as central feedback repository
- Create basic reporting and alert workflows

Phase 2: Expansion (3–6 months)

- Add touchpoints #3, #6, and #8 (Win/Loss, In-Product, NPS)
- Develop cross-functional review processes
- Implement more sophisticated reporting and trend analysis

Phase 3: Optimization (6–12 months)

- Add touchpoints #2, and #7 (Qualification, Referrals)
- Implement comprehensive customer health scoring
- Develop advanced automation and predictive analytics

By following this phased approach and focusing on these key touchpoints, you'll build a comprehensive feedback system that spans the entire customer journey and drives measurable business outcomes.

Are your feedback foundations strong enough to drive GTM success?

Take our comprehensive Feedback Foundations Assessment to uncover gaps, benchmark against industry leaders, and receive expert recommendations to improve customer retention and revenue impact. **Don't let siloed feedback hold your business back—start your assessment today.**



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