



Creating an NPS Survey in Pardot and Salesforce

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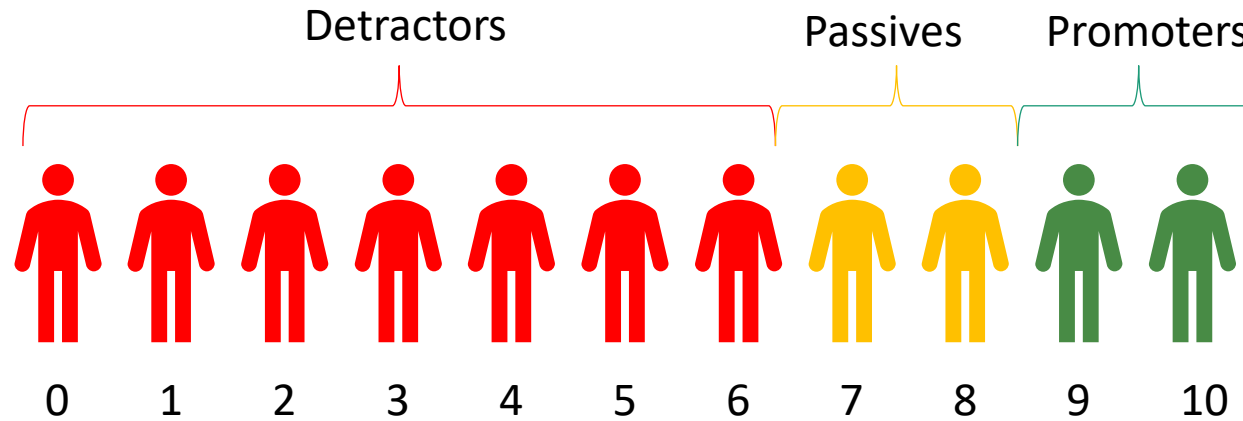
What is NPS?

- Net Promoter Score
- A 2 Question Survey
 - Would you recommend us to a friend or colleague?
 - Why?
- Why it works

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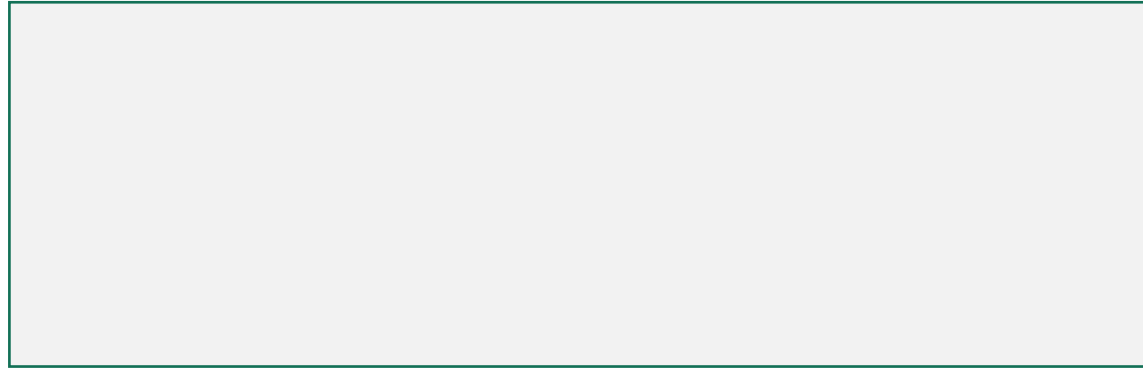
What is the Score?



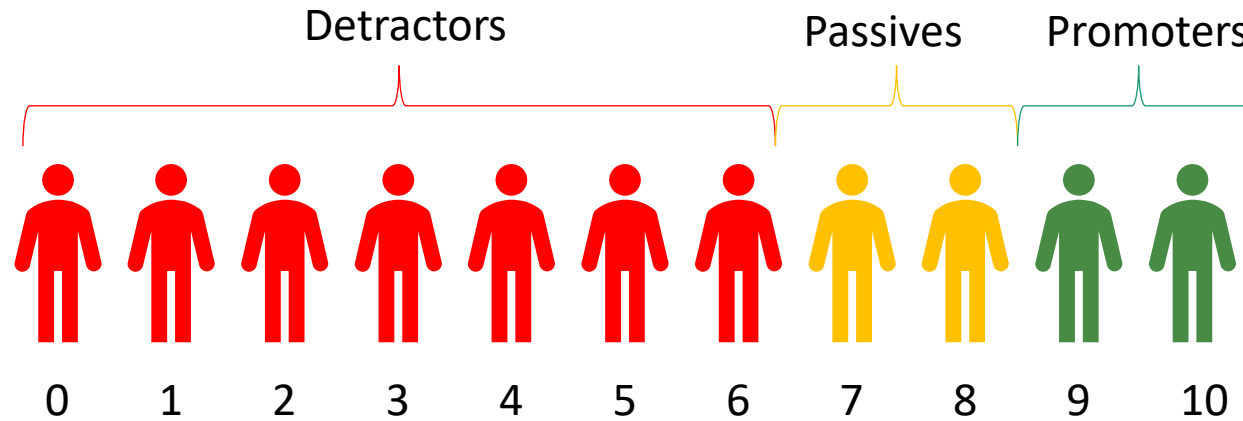
Would you recommend us to a friend or colleague?

What is the Score?

Why did you answer that way?



How do you Calculate NPS? (It's not an average)



$$\frac{\# \text{ total Promoters} - \# \text{ of total Detractors}}{\text{Total \# responses}} \times 100$$

Passives are ignored and actual score value does not matter.

What is a good score?



+100 to -100

Do you need a survey tool to do NPS?

No!

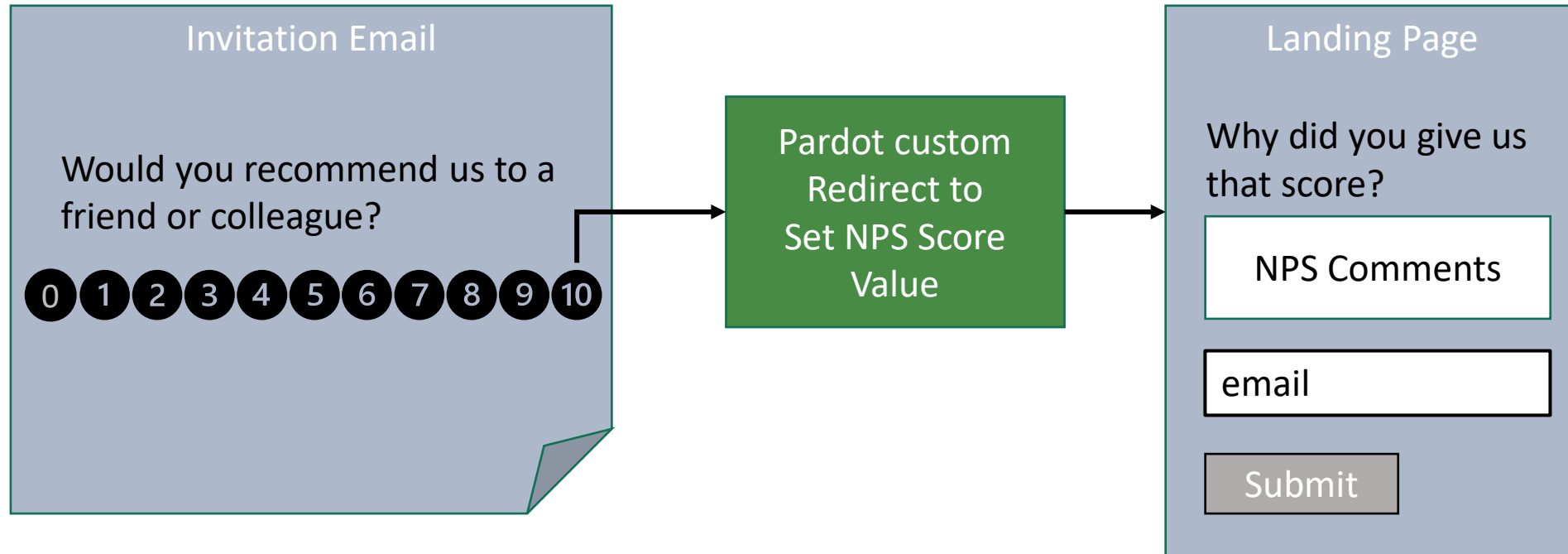
You know who to ask already

You have everything you need
In Pardot and Salesforce

“Supplies Needed”

- 2 Custom Pardot Fields
- 5 Custom Salesforce fields on Contacts
- 11 Custom Redirects
- 1 Landing Page with a Form
- 1 Email template
- 1 Salesforce Report
- 1 Salesforce campaign (optional)

The Process:



Custom Fields

Pardot Field	Sync Behavior	Salesforce Field (Contact)
NPS Score (Number)	Use Pardot's Value	NPS Score (Number, 2)
NPS Comments (Text Area)	Use Pardot's Value	NPS Comments (Text Area)
		NPS Promoter (Formula)
		NPS Passive (Formula)
		NPS Detractor (Formula)

NPS Score and Comments do not have to be on contact page layout

Salesforce Campaign

- Custom Member Statuses:
 - Feedback Requested
 - Gave Rating
 - Answered NPS

1 Landing Page

- Form with 2 Questions
 - Email (pre-fills)
 - NPS Comments
- Could even be the form with no landing page at all!

11 Custom Redirects

- One for Each Number, 0-10
- Completion Actions:
 - Set NPS Score field equal to the number of the redirect
 - (Optional) add to salesforce campaign and set status
 - (Optional) set task to notify someone of detractor scores.
- Redirect Location: your landing page or landing form

Email Template: Get answer #1 in the first click



Every number corresponds to a custom redirect that sets a different answer number

B**I****U****S****≡****I_x**

Merge Field

A**A**

Link



Link Info

Advanced

Link Type

Custom Redirect



NPS Score 4



NPS Score 0

NPS Score 1

NPS Score 10

NPS Score 2

NPS Score 3

NPS Score 4

NPS Score 5

NPS Score 6

NPS Score 7

NPS Score 8

NPS Score 9

Color

#0095

OK

Cancel

☐ 1. Completely dissatisfied☐ 2. Mostly dissatisfied☐ 3. Somewhat dissatisfied☐ 4. Neither satisfied or dissatisfied☐ 5. Neutral schmeutral☐ 6. Somewhat satisfied

Save Draft

Publish to Template

Cancel

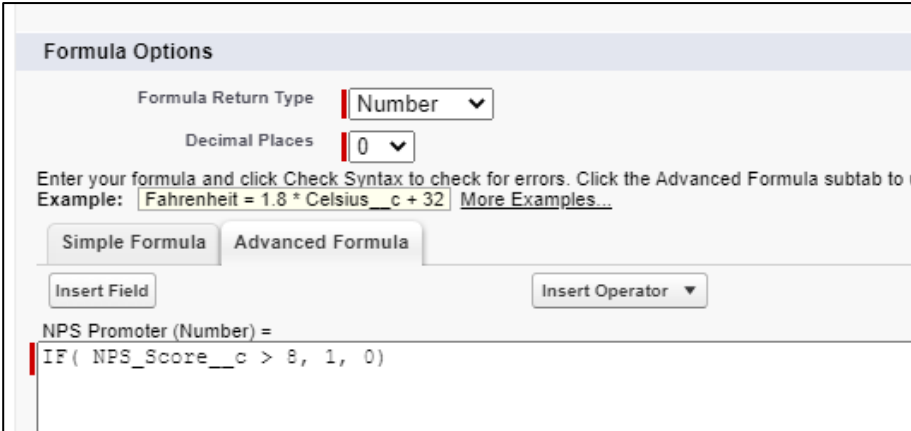
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1 Landing Page (continued)

- Form with 2 Questions
 - NPS Comments
 - Email (pre-fills)
- Completion Action: Update Form Status

3 Formula Fields in Salesforce

- Formula Field
 - Return Type is Number, 0 decimal Places
- NPS Promoter: `IF(NPS_Score__c > 8, 1, 0)`
- NPS Passive: `IF(AND(NPS_Score__c > 6, NPS_Score__c < 9), 1, 0)`
- NPS Detractor: `IF(NPS_Score__c < 7, 1, 0)`



The screenshot shows the 'Formula Options' dialog box in Salesforce. It has two tabs: 'Simple Formula' and 'Advanced Formula'. The 'Simple Formula' tab is selected. In this tab, there are two dropdown menus: 'Formula Return Type' set to 'Number' and 'Decimal Places' set to '0'. Below these, there is a text area for the formula. The text area contains the formula: `NPS Promoter (Number) = IF(NPS_Score__c > 8, 1, 0)`. Above the text area, there is a button labeled 'Insert Field' and a button labeled 'Insert Operator'. There is also a link for 'More Examples...'.

1 Salesforce Report

- Score
- Comments
- Promoters
- Passives
- Detractors
- Background information
- One Formula Field

Salesforce Formula Field

Edit Summary-Level Formula Column

Fields Functions

Search Fields

- Count (1)
 - # Record Count
- Contact: General (26)
 - A Contact Owner
 - A Contact Owner Alias
 - A Created By
 - A Created Alias
 - A Last Modified By
 - A Last Modified Alias
 - Salutation
 - A First Name
 - A Last Name
 - A Title
 - A Department
 - Birthdate
 - Lead Source
 - A Assistant
 - A Asst. Phone
 - A Owner Role Display

Sum Insert >

* Column Name: NPS Calculation Description:

Formula Output Type: Number Decimal Points: 0

General Display

1 (Contact.NPS_Promoter__c:SUM/RowCount*100) - (Contact.NPS_Detractor__c:SUM/RowCount*100)

Validate

Using HML to reveal question if blank!

```
{{#if NPS_Score}}
```

Would you recommend us to a friend or colleague?

0 1 2 3 4 5 6 7 8 9 10

Definitely No

Definitely Yes

```
{{else}}{{/if}}
```

NPS Follow-on Uses for Marketing

- Special Treatment for Promoters
 - Invite to review
 - Special invitations
 - Case Studies
- Work on Passives
 - What would it take?
- Evaluate Detractors



Thank You

