

NPS - New process 2025

1. Introduction

- **1.1 Scope**

Survey creation, translation and management, campaign creation, campaign member management, survey invitation generation, survey sends email notifications, and status tracking.

- **1.2 Some Definitions and Acronyms**

"FLE" - stands for "frontline employee", denotes a user responsible for a contact in relation to the NPS process. "FLE" is, effectively, a more up-to-date contact owner.

"NPS" - "net promoter score", a market research metric asking respondents to rate the likelihood that they would recommend a company to a friend or colleague. It assumes a division of respondents into "**promoters**" who provide ratings of 9 or 10, "passives" who provide ratings of 7 or 8, and "**detractors**" who provide ratings of 6 or lower. Calculating the net promoter score involves subtracting the percentage of detractors from the percentage of promoters collected by a survey.

Note - we use "NPS" throughout the system to identify metadata that belongs to the project. However, "**NPX**" can be found occasionally as part of historical metadata that was re-used for this project, e.g. "NPX Survey Record". For our purposes, "NPX" and "NPS" are equivalent.

"Salesforce Surveys" vs "**Salesforce Feedback Management**" - "Salesforce Feedback Management" consists of 2 features, "Salesforce Surveys" and "Scheduled Reminders". We only use the "Salesforce Surveys" feature, with "Scheduled Reminders" being disabled in the system.

2. System Overview

- **2.1 High-Level Process Description**

The NPS process follows these stages:

1. **Campaign Setup:** NPS campaigns are created to target specific customer segments.
2. **Campaign Member Management:** Contacts are added to campaigns as campaign members (see 10. "Magic Tool").
3. **Survey Preparation:** Surveys are created in Salesforce Surveys and configured for the NPS process.
4. **Invitation Generation:** When a campaign is activated, survey invitations are sent to eligible contacts.
5. **Response Tracking:** The system tracks invitation status (not started, started, completed).
6. **Response Analysis:** Completed surveys trigger updates to the NPX Survey Record with response data.
7. **Follow-up Actions:** For detractors (scores below 7), feedback call tasks are automatically created. NPS Action Plan tasks are available.
8. **Reporting:** NPS data is available for analysis and reporting via a number of reports and components on Accounts, Contacts, and Campaigns.

- **2.2 Integration with Salesforce Surveys**

The solution uses Salesforce Surveys for creating and distributing surveys. Key integration points include:

- Custom object NPS Survey Record that links Salesforce Survey responses to Campaign Members
- Flow automation to extract survey responses and store them in the NPX Survey Record object
- Custom email handling for unsubscribes, survey invitations and reminders

- **2.3 Relationship to Salesforce Feedback Management Package**

While the solution utilizes the Salesforce Surveys component of Feedback Management, it implements custom automation flows rather than using the standard Scheduled Reminders feature. The solution creates a custom reminder mechanism through scheduled flows.

3. Business Process

3.1 Campaign Management Process

3.1.1 Campaign Creation

- Campaigns are created with the "NPS Campaign" record type
- Each campaign represents a group of contacts that will receive the NPS survey
- Campaigns have start and end dates that control the survey availability period - these are set automatically by a flow, using the date of the first send for the start date and the last day of validity of survey invitation links for the end date.

3.1.2 Campaign Member Management

- Contacts are added to campaigns as Campaign Members (see 10. "Magic Tool").
- Each Campaign Member is linked to a Frontline Employee (FLE) - it is important to assign Frontline Employee before sending a survey to enable post-response activities by the company employees responsible for the account
- If no Frontline Employee is specified, the Contact's owner becomes the default FLE

- Campaign Members can be rejected from participation using the "Nomination Status" field

3.1.3 Campaign Modification

Through the "NPS - Campaign: Change Campaign" flow, administrators can:

- Change expiry dates for all active invitations in a campaign
- Expire all survey invitation links immediately
- Reset campaign members back to "New" status

3.2 Survey Invitation Process

3.2.1 Eligibility Check

Before sending survey invitations, contacts undergo several eligibility checks:

- **NPS Opt Out:** Contacts who have opted out of NPS surveys are excluded
- **NPS No Send Rule:** Contacts with specific business rules preventing surveys are excluded
- **Out of NPS Scope:** Contacts marked as outside the NPS scope are excluded
- **Inactive Contact:** Inactive contacts are excluded
- **Email Bounced:** Contacts with bounced emails are excluded

3.2.2 Survey Dispatch

The "NPS - Campaign: Send Survey" flow manages the survey sending process:

1. Users select which survey to send
2. Email set and template are chosen
3. Reminder frequency is configured (1-3 reminders)
4. Reminder intervals are set (2-14 days apart)
5. Auto-expiry period is defined

3.2.3 Time-Zone Optimization

Survey invitations are sent at optimal times based on the contact's region:

- Americas region: 4 PM Paris time
- Asia and Oceania region: 4 AM Paris time
- Europe, Africa, and unlisted regions: 9 AM Paris time

3.3 Survey Response Handling

3.3.1 Response Tracking

Survey responses are tracked through several status fields:

- **Survey Not Started:** Invitation sent but not opened
- **Survey Started:** Recipient began but did not complete the survey
- **Survey Completed:** Recipient submitted the complete survey

3.3.2 Response Analysis

When a survey is completed:

1. The "NPS - Survey Invitation: Update NPX Survey Record" flow extracts response data
2. Key metrics are populated in the NPX Survey Record:
 - NPS score (0-10)
 - Various satisfaction metrics for different departments
 - Comments and feedback from text fields
3. Statuses are updated across related objects

3.3.3 Detractor Follow-up Process

When a respondent gives a score below 7 (detractor):

1. The "NPS - NPX Survey Record: Create Feedback Call Task" flow creates a task
2. The task is assigned to the Frontline Employee
3. The FLE receives an email notification about the low score
4. The task is due within 14 days

3.4 Reminder Process

3.4.1 Reminder Configuration

Reminders are configured during the survey send process:

- Number of reminders (1-3)
- Days between reminders (2-14)

3.4.2 Reminder Execution

The "NPS - NPX Survey Record: Send Reminders" scheduled flow:

1. Identifies records with reminders due today
2. Checks if the survey is still pending completion
3. Sends reminder emails using appropriate templates and language

3.5 Email Bounce Handling

3.5.1 Bounce Detection

The system detects bounced emails through standard Salesforce bounce tracking.

3.5.2 Bounce Notification

The "NPS - Campaign Member: Email Employees About Bounced Contacts" flow:

1. Identifies campaign members with bounced emails
2. Notifies Frontline Employees about the bounced email
3. Requests update of contact information
4. Updates the Campaign Member status to "Email_Bounced"

4. Data Model and Object Design

- 4.1 Key Objects and Relationships

4.1.1 Campaign

- Central object for organizing NPS surveys
- Tracks campaign dates and parameters
- Uses "SLV20_NPS_Campaign" record type

4.1.2 Campaign Member

- Links Contacts to Campaigns
- Tracks NPS-specific statuses
- Stores relationship to Frontline Employee
- Key fields:
 - NPS_Status__c: Current status in the NPS process
 - Nomination_Status__c: Whether the member is Added, Processed, or Rejected
 - SLV20_Employee_NPS__c: Frontline Employee
 - NPS_Send_Time__c: Time zone-appropriate send time
 - NPS_Survey_Developer_Name__c: Selected survey name
 - NPS_Email_Set__c: Email template set
 - NPS_Number_of_Reminders__c: Configured reminder count
 - NPS_Reminders_How_Many_Days_Apart__c: Days between reminders
 - NPS_Invitation_Expiry_Days__c: Days until invitation expires
 - NPS_Last_Attempted_Communication_Date__c: Date of last communication

Campaign Member	
NPS Email Set	Text(255)
NPS Invitation Expiry Days	Number(3, 0)
NPS Last Attempted Communication Date	Date
NPS Number of Reminders	Number(2, 0)
NPS Reminders How Many Days Apart	Number(3, 0)
NPS Send Time	Picklist

NPS Status	Picklist
NPS Survey Developer Name	Text(250)

4.1.3 Contact

- Contains customer information
- Tracks NPS preferences and history
- Key fields:
 - NPS_Opt_Out__c: Indicates opt-out from NPS surveys
 - NPS_No_Send_Rule__c: Business rule preventing surveys
 - SLV20_Out_of_NPS_Scope__c: Outside scope for NPS
 - SLV_Inactive__c: Inactive contact flag
 - NPS_Last_Completion_Date__c: Date of last completed survey
 - NPS_Temporary_Opt_In__c: Temporary override of opt-out status
 - Frontline_Employee__c: Assigned FLE
 - SLV_Contact_Role__c: Role (Decider, Influencer, User)
 - SLV4_Language_Picklist__c: Preferred language for communications

Contact	
NPS Last Completion Date	Date
NPS No Send Rule	Formula
NPS Opt Out	Checkbox
NPS Opt Out Date	Date
Out of NPS Scope	Checkbox

4.1.4 NPX Survey Record

- Custom object that stores survey response data
- Links to Campaign and Contact
- Contains all survey responses and metrics
- Key fields:
 - Name: Survey Invitation ID
 - Status__c: Current status (Survey_Not_Started, Survey_Started, Survey_Completed)
 - NPS__c: Net Promoter Score (0-10)
 - Campaign__c: Related campaign
 - Contact__c: Respondent contact
 - Invitation_Sent_Date__c: Date invitation was sent
 - Response_Received_Date__c: Date response was received
 - First_Reminder_Date__c, Second_Reminder_Date__c, Third_Reminder_Date__c: Scheduled reminder dates
 - Feedback_Call__c: Whether a feedback call is needed (for detractors)
 - Various satisfaction metrics and comment fields

4.1.5 Survey Invitation (Salesforce Surveys)

- Standard object from Salesforce Surveys
- Tracks invitations and responses
- Key fields:
 - ResponseStatus: Not Started, Started, Completed
 - InviteExpiryDateTime: When the invitation expires
 - ContactId: Recipient contact

Salesforce Surveys Data Model - we use it almost as it, with one exception in Core, the Related Object field on the Survey Invitation object, used to differentiate this NPS process from the Customer Complaint Feedback process:

5. Process Flows and Automation

	Flow	Type	Object	External Effects	Email Type Sent
1	NPS - Contact: Update Campaign Members and Contact Role	Record-Triggered Flow	Contact	<i>updates: Contacts, Campaign Members</i>	

2	NPS - Campaign Member: Set Frontline Employee	Record-Triggered Flow	Campaign Member	updates: Campaign Members	
3	NPS - Campaign Member: Update Contact Frontline Employee	Record-Triggered Flow	Campaign Member	updates: Contacts	
4	NPS - Campaign Member: Change Status to Rejected	Record-Triggered Flow	Campaign Member	updates: Campaign Members	
5	NPS - Campaign: Send Survey	Screen Flow		updates: Campaigns, Campaign Members	
6	NPS - Campaign: Change Campaign	Screen Flow		updates: NPX Survey Records, Campaign Members, Survey Invitations, Campaigns	
7	NPS - Campaign Member: Update NPS Details	Record-Triggered Flow	Campaign Member	updates: Campaign Members	
8	NPS - Contact: Is Sendable Check Subflow	Subflow	Contact		
9	NPS - Campaign Member: Daily Scheduled Invitations Send	Scheduled Flow	Campaign Member	sends emails	single email (cannot change)
10	NPS - NPX Survey Record: Send Reminders	Scheduled Flow	Campaign Member	sends emails	single email (cannot change)
11	NPS - Contact: Determine Email Template Language	Subflow	Contact		
12	NPS - Contact: Determine Email Template	Subflow	Email Template		
13	NPS - Survey Invitation: Create New NPX Survey Record	Record-Triggered Flow	Survey Invitation		
14	NPS - Survey Invitation: Update Contact and Campaign Member	Record-Triggered Flow	Survey Invitation		
15	NPS - Survey Invitation: Update NPX Survey Record	Record-Triggered Flow	Survey Invitation		
16	NPS - Campaign Member: Email Employees About Bounced Contacts	Scheduled Flow	Campaign Member	sends emails	single email
17	NPS - NPX Survey Record: Email Employees About Survey Completion	Scheduled Flow	NPX Survey Record	sends emails	single email
18	NPS - NPX Survey Record: Create Feedback Call Task	Record-Triggered Flow	NPX Survey Record	sends emails	both single email and email alert

- **Record-Triggered Flows**

List and describe each flow triggered by record changes:

- **Flow 1:** NPS - Contact: Update Campaign Members and Contact Role
Updates contacts and their related campaign members.
- **Flow 2:** NPS - Campaign Member: Set Frontline Employee
Determines and sets the frontline employee flag.
- **Flow 3:** NPS - Campaign Member: Update Contact Frontline Employee
Synchronizes frontline employee data from Campaign Members back to Contacts.
- **Flow 4:** NPS - Campaign Member: Change Status to Rejected
Handles rejection scenarios for campaign members.
- **Flow 7:** NPS - Campaign Member: Update NPS Details
Updates NPS-specific fields on campaign members.
- **Flow 13:** NPS - Survey Invitation: Create New NPX Survey Record
Creates a new survey record when an invitation is generated.
- **Flow 14:** NPS - Survey Invitation: Update Contact and Campaign Member
Updates related contact and campaign member details when an invitation is processed.
- **Flow 15:** NPS - Survey Invitation: Update NPX Survey Record
Updates survey records with invitation-specific details.
- **Flow 18:** NPS - NPX Survey Record: Create Feedback Call Task
Generates a feedback call task based on survey completion.

- **Screen Flows**

Describe flows that require user interaction:

- **Flow 5:** NPS - Campaign: Send Survey
Guides the user through sending surveys manually.
- **Flow 6:** NPS - Campaign: Change Campaign
Allows updating of survey records and campaign details.

- **Scheduled Flows**

Describe flows that run on a schedule:

- **Flow 9:** NPS - Campaign Member: Daily Scheduled Invitations Send
Sends out daily survey invitations.
- **Flow 10:** NPS - NPX Survey Record: Send Reminders
Sends reminder emails for pending surveys.
- **Flow 16:** NPS - Campaign Member: Email Employees About Bounced Contacts
Alerts team members when emails bounce.
- **Flow 17:** NPS - NPX Survey Record: Email Employees About Survey Completion
Notifies employees upon survey completion.

- **Subflows**

Describe reusable flows:

- **Flow 8:** NPS - Contact: Is Sendable Check Subflow
Determines if a contact is eligible to receive an email.
- **Flow 11:** NPS - Contact: Determine Email Template Language
Selects the correct email language template.
- **Flow 12:** NPS - Contact: Determine Email Template
Determines which email template to use.

5.1 Survey Initiation and Sending Process

The survey initiation process begins with the "NPS - Campaign: Send Survey" screen flow, which allows users to:

1. Select a survey to send
2. Choose an email template set (Set A through Set E)
3. Configure reminder settings
4. Set invitation expiry period

For each eligible campaign member, the system:

1. Checks if the contact is sendable (not opted out, no bounce history, etc.)
2. Determines appropriate send time based on region
3. Updates the Campaign Member status to "Awaiting_Send"

The "NPS - Campaign Member: Daily Scheduled Invitations Send" scheduled flow then:

1. Processes campaign members with "Awaiting_Send" status
2. Sends survey invitations at appropriate times
3. Creates NPX Survey Records for each invitation
4. Updates statuses to "Survey_Not_Started"

5.2 Survey Response Process

When a contact responds to a survey:

1. The "NPS - Survey Invitation: Update Contact and Campaign Member" flow updates statuses:
 - If survey is started but not completed: Status changes to "Survey_Started"
 - If survey is completed: Status changes to "Survey_Completed"
2. For completed surveys, the "NPS - Survey Invitation: Update NPX Survey Record" flow:
 - Extracts all survey responses
 - Populates corresponding fields in the NPX Survey Record
 - Updates the response received date
3. If the NPS score is below 7 (detractor), the "NPS - NPX Survey Record: Create Feedback Call Task" flow:
 - Creates a feedback call task assigned to the Frontline Employee
 - Sets a due date 14 days in the future
 - Sends a notification email to the Frontline Employee
4. The "NPS - NPX Survey Record: Email Employees About Survey Completion" flow:
 - Notifies the Frontline Employee about the survey completion
 - Provides a link to the survey response

5.3 Reminder Process

The reminder process uses the "NPS - NPX Survey Record: Send Reminders" scheduled flow:

1. Runs daily to identify records with reminders due today
2. Checks if the survey is still pending completion
3. Verifies the contact is still eligible (not opted out, etc.)
4. Determines appropriate email template and language
5. Sends reminder email
6. Updates the Campaign Member's last communication date

5.4 Email Bounce Handling Process

When emails bounce, the "NPS - Campaign Member: Email Employees About Bounced Contacts" flow:

1. Runs daily to check for bounced emails from previous day

2. Identifies related Campaign Members
3. Updates their status to "Email_Bounced"
4. Notifies the Frontline Employee via email
5. Includes a link to update the contact's email address

5.5 Campaign Member Status Management

Campaign Member statuses follow this progression:

1. **New**: Initial status when added to campaign
2. **Awaiting_Send**: Ready to receive survey invitation
3. **Survey_Not_Started**: Invitation sent but not opened
4. **Survey_Started**: Survey begun but not completed
5. **Survey_Completed**: Survey submitted

Exception statuses include:

- **Email_Bounced**: Email address is invalid
- **NPS_Opt_Out**: Contact has opted out of NPS surveys
- **NPS_No_Send_Rule**: Business rule prevents surveys
- **Out of NPS Scope**: Contact is outside NPS scope
- **Inactive_Contact**: Contact is inactive
- **Rejected**: Manually exclude

6. Email Services and Communication

• 6.1 Email Template Selection and Language

The solution uses a template selection process:

1. The "NPS - Contact: Determine Email Template Language" subflow:
 - Identifies the contact's preferred language from SLV4_Language_Picklist__c
 - Supports English, French, German, Portuguese, Italian, Spanish, Korean, Japanese, Chinese Traditional, and Chinese Simplified
2. The "NPS - Contact: Determine Email Template" subflow:
 - Combines language, email set (A-E), and type (invitation vs. reminder)
 - Follows fallback logic: if language-specific template not found, uses English
 - If no template found, uses default baseline templates

• 6.2 Temporary Opt-Out Override

For contacts who have previously opted out of standard Salesforce Marketing communications (Email Opt-Out), which for NPS purposes we ignore, the system:

1. Temporarily removes the opt-out flag (HasOptedOutOfEmail)
2. Sets NPS_Temporary_Opt_In__c to true
3. Sends the email
4. Waits one hour
5. Restores the original opt-out status

• 6.3 Send Time Optimization

Emails are sent at region-appropriate times:

- Americas: 16:00 (4 PM)
- Asia/Oceania: 04:00 (4 AM)
- Europe/Africa/Others: 09:00 (9 AM)

Additionally, the system implements staggered sending based on the contact's last name to avoid overwhelming email servers:

- A-E: Immediate
- F-J: 5 minutes delay
- K-O: 10 minutes delay
- P-T: 15 minutes delay
- U-Z: 20 minutes delay

• 6.4 Communication Tracking

NPS Send Time, NPS Last Attempted Communication Date

• 6.5 Weekend Processing Prevention

The daily scheduled send flow includes logic to skip processing on weekends (Friday, Saturday, Sunday) to ensure communications are sent during business days.

6.6 Contact Sendability Checks

The "NPS - Contact: Is Sendable Check Subflow" performs comprehensive checks: NPS Opt Out status, NPS No Send Rule status, Out of NPS Scope flag, Inactive Contact status, Email bounce history, Empty email address

If a contact fails any check, their Campaign Member record is updated with the appropriate status.

7. Administration

7.1 Campaign Management Tasks

Administrators from the NPS team can perform these key tasks:

1. Create NPS campaigns with appropriate record types
2. Add contacts as campaign members
3. Configure and send surveys
4. Update expiry dates or reset statuses using the "NPS - Campaign: Change Campaign" flow
5. Track completion rates and response statistics

7.2 Contact Management Tasks

For contact management, NPS team or Sales users can:

1. Set or update Frontline Employee relationships
2. Manage opt-out preferences
3. Update email addresses for bounced contacts
4. Review and respond to feedback from detractors

1. Question References

To match Salesforce Surveys questions to the correct fields in NPX Survey Record, we insert the following Question Refs into the beginning of each question in a survey:

Question Refs	Baseline Survey Question Text	Data Type	NPX Survey Record field	Survey Page Name
(REF:SN1A)	When interacting with Syensqo, what is your primary role?	Text	Contact Job Department	Role Selection
(REF:NP1A)	How likely are you to recommend Syensqo?	Number	NPS	Company NPS
(REF:SN2A)	Which area is the most important for you?	Text	Episode Selection	Primary Episode
(REF:SC2A)	How would you evaluate our Account Management?	Number	Primary Score	
(REF:SC2A)	How would you evaluate our Order Management?	Number		
(REF:SC2A)	How would you evaluate our Technical Support?	Number		
(REF:SC2A)	How would you evaluate our Quality Management?	Number		
(REF:SC2A)	How would you evaluate our Business Development?	Number		
(REF:SC2A)	How would you evaluate our Strategic Relationship?	Number		
(REF:SN3A)	And which one is the second most important?	Text		
(REF:SC3A)	How would you evaluate our Order Management?	Number	Secondary Score	
(REF:SC3A)	How would you evaluate our Technical Support?	Number	Secondary Score	
(REF:SC3A)	How would you evaluate our Quality Management?	Number	Secondary Score	
(REF:SC3A)	How would you evaluate our Business Development?	Number	Secondary Score	
(REF:SC3A)	How would you evaluate our Strategic Relationship?	Number	Secondary Score	
(REF:SN3A)	And which one is the second most important?	Text	Secondary Episode Selection	OM - Secondary Episode
(REF:SC3A)	How would you evaluate our Account Management?	Number	Secondary Score	
(REF:SC3A)	How would you evaluate our Technical Support?	Number	Secondary Score	
(REF:SC3A)	How would you evaluate our Quality Management?	Number	Secondary Score	
(REF:SC3A)	How would you evaluate our Business Development?	Number	Secondary Score	
(REF:SC3A)	How would you evaluate our Strategic Relationship?	Number	Secondary Score	
(REF:SN3A)	And which one is the second most important?	Text	Secondary Episode Selection	TS - Secondary Episode
(REF:SC3A)	How would you evaluate our Account Management?	Number	Secondary Score	
(REF:SC3A)	How would you evaluate our Order Management?	Number	Secondary Score	
(REF:SC3A)	How would you evaluate our Quality Management?	Number	Secondary Score	
(REF:SC3A)	How would you evaluate our Business Development?	Number	Secondary Score	
(REF:SC3A)	How would you evaluate our Strategic Relationship?	Number	Secondary Score	
(REF:SN3A)	And which one is the second most important?	Text	Secondary Episode Selection	QM - Secondary Episode

(REF:SC3A)	How would you evaluate our Account Management?	Number	Secondary Score	
(REF:SC3A)	How would you evaluate our Order Management?	Number	Secondary Score	
(REF:SC3A)	How would you evaluate our Technical Support?	Number	Secondary Score	
(REF:SC3A)	How would you evaluate our Business Development?	Number	Secondary Score	
(REF:SC3A)	How would you evaluate our Strategic Relationship?	Number	Secondary Score	
(REF:SN3A)	And which one is the second most important?	Text	Secondary Episode Selection	BD - Secondary Episode
(REF:SC3A)	How would you evaluate our Account Management?	Number	Secondary Score	
(REF:SC3A)	How would you evaluate our Order Management?	Number	Secondary Score	
(REF:SC3A)	How would you evaluate our Technical Support?	Number	Secondary Score	
(REF:SC3A)	How would you evaluate our Quality Management?	Number	Secondary Score	
(REF:SC3A)	How would you evaluate our Strategic Relationship?	Number	Secondary Score	
(REF:SN3A)	And which one is the second most important?	Text	Secondary Episode Selection	SR - Secondary Episode
(REF:SC3A)	How would you evaluate our Account Management?	Number	Secondary Score	
(REF:SC3A)	How would you evaluate our Order Management?	Number	Secondary Score	
(REF:SC3A)	How would you evaluate our Technical Support?	Number	Secondary Score	
(REF:SC3A)	How would you evaluate our Quality Management?	Number	Secondary Score	
(REF:SC3A)	How would you evaluate our Business Development?	Number	Secondary Score	
(REF:SC5A)	Responsiveness	Number	AM - Responsiveness	5 AM Detailed
(REF:SC4A)	Partnership	Number	Partnership	
(REF:SC4B)	Innovation	Number	Innovation	
(REF:SC4C)	Sustainability	Number	Sustainability	
(REF:SC4D)	Digital	Number	Digital	
(REF:SC6A)	Professionalism and Support	Number	OM - Professionalism and support	5 OM Detailed
(REF:SC6B)	Orders Confirmation	Number	OM - Order confirmation	
(REF:SC6C)	Orders Change Communication	Number	OM - Order change communication	
(REF:SC4C)	Sustainability	Number	Sustainability	
(REF:SC4D)	Digital	Number	Digital	
(REF:SC7A)	Responsiveness	Number	TS -Responsiveness	5 TS Detailed
(REF:SC7B)	Clear Contact and Type of Interaction	Number	TS-Clear contact and type of interaction	
(REF:SC7C)	Deep, Up-to-Date Expertise	Number	TS - Deep, up-to-date expertise	
(REF:SC4C)	Sustainability	Number	Sustainability	
(REF:SC4D)	Digital	Number	Digital	
(REF:SC8A)	Quality Perception	Number	QM - Quality Perception	5 QM Detailed
(REF:SC8B)	Improvement Mindset	Number	QM - Improvement mindset	
(REF:SC8C)	Flexibility	Number	QM - Flexibility on quality requirements	
(REF:SC8D)	Complaints Handling	Number	QM - Complaints Handling	
(REF:SC4D)	Digital	Number	Digital_Solutions	
(REF:SC9A)	Responsiveness	Number	BD - Responsiveness	5 BD Detailed
(REF:SC9B)	Proactive in Proposing New Applications	Number	BD - Proactivity in proposing new applic	
(REF:SC4B)	Innovation	Number	Innovation	
(REF:SC4C)	Sustainability	Number	Sustainability	
(REF:SC4D)	Digital	Number	Digital	
(REF:SC1A)	Frequency of Interactions	Number	SR - Frequency of Interactions	5 SR Detailed
(REF:SC4A)	Partnership	Number	Partnership	
(REF:SC4B)	Innovation	Number	Innovation	

(REF:SC4C)	Sustainability	Number	Sustainability	
(REF:SC4D)	Digital	Number	Digital	
(REF:LT1A)	What is the most important thing Syensqo can do to improve your experience?	Text	Improvement Comment	Not Promoter - Final Feedback
(REF:LT2A)	Any other comments?	Text	Primary Comment	
(REF:LT1B)	What is the best thing Syensqo has done for you?	Text	Strength Comment	Promoter - Final Feedback
(REF:LT2A)	Any other comments?	Text	General Comment	
(REF:ONR1)	OM - Delivery availability	Number	Optional Number Response 1	
(REF:ONR2)	AM - Contract	Number	Optional Number Response 2	
(REF:ONR3)	Product Range	Number	Optional Number Response 3	
(REF:ONR4)	AM - Pricing	Number	Optional Number Response 4	
	ADDITIONAL FIELDS			
(REF:ONR5)		Number	Optional Number Response 5	
(REF:LT3A)		Text	Competitor Comment	
(REF:LT4A)		Text	NPS Comment	
(REF:OTR1)		Text	Optional Text Response 1	
(REF:OTR2)		Text	Optional Text Response 2	
(REF:OTR3)		Text	Optional Text Response 3	

9. Statuses and Process Lifecycle

9.1 Status Definitions Across Objects

- **Campaign Member Status:**
New, Awaiting Send, Survey Invitation Sent, Survey Started, Survey Completed, Email Bounced, NPS No Send Rule, NPS Opt Out, Rejected, Inactive Contact, Out of NPS Scope.
- **NPX Survey Record and Survey Invitation Statuses:**
NotStarted, Started, Completed, and Invalid (e.g., when a newer invitation invalidates the previous one).

STATUSES ACROSS THE SOLUTION					
Campaign Member			NPX Survey Record	Survey Invitation	Explanation
NPS Status:	Nomination Status:	Status:	Status:	Response Status:	<i>Contact was just added to the campaign</i>
New (default)	Added (default)	(Not in use by NPS)			
Awaiting Send (master)	Nominated				<i>Contact is scheduled to be sent an invitation</i>
Survey Invitation Sent	Processed		Survey_Not_Started	NotStarted (master)	<i>Invitation was sent, invitation link not yet clicked</i>
Survey Started			Survey_Started	Started (master)	<i>Invitation link was clicked by customer</i>
			Survey_Invalid		<i>A newer survey invitation was generated, invalidating this one</i>
				Paused (master)	(Not in use by NPS)
Survey Completed			Survey_Completed	Completed (master)	<i>Survey was completed by customer</i>
Email Bounced (master)			Survey_Bounced *		<i>Contact's email is marked as bounced by Salesforce</i>
NPS No Send Rule					<i>Contact completed a survey within last year, cannot receive another one</i>
NPS Opt Out					<i>Contact has unsubscribed from NPS surveys, cannot receive another one</i>

Rejected	Rejected (master)			Contact was rejected from the campaign by an employee
Inactive Contact				Contact is marked as inactive, cannot receive an invitation
Out of NPS Scope (Abacus goes here)				Manually added by Account Managers to Contacts they don't want to receive NPS + Abacus added automatically on every send

10. Unsubscribe Process

10.1 Email Unsubscribe Handling

The unsubscribe process allows contacts to opt out of NPS surveys by sending an email with "unsubscribe" in the subject line. This is implemented through the NPS_Unsubscribe Apex class, which serves as an inbound email handler:

- Inbound Email Processing:** When a contact sends an email with "unsubscribe" in the subject line to the designated email address, the NPS_Unsubscribe class processes it.
- Contact Lookup and Update:** The system looks up all contacts with a matching email address and sets their NPS_Opt_Out__c field to true.
- Opt-Out Date Tracking:** The system records the opt-out date in the NPS_Opt_Out_Date__c field.
- Multiple Contact Handling:** If multiple contacts share the same email address, all matching contacts will be opted out simultaneously.
- Confirmation:** The system automatically processes the request without sending a confirmation email to the sender.

10.2 Integration with NPS Process

The unsubscribe mechanism integrates with the overall NPS process:

- Automatic Exclusion:** Contacts who have opted out are automatically excluded from future NPS survey campaigns during the eligibility check.
- Status Update:** Campaign members associated with opted-out contacts will have their NPS Status updated to "NPS_Opt_Out" through the eligibility check process.
- Email Template Requirements:** All NPS email templates must include an unsubscribe link that directs to this email-based unsubscribe mechanism.

11. Campaign Member Management Interface ("Magic Tool")

11.1 Overview and Capabilities

The Campaign Member Management interface (known "Magic Tool") provides NPS team and Sales managers with a set of tools for managing NPS campaign members:

- Multi-Record Editing:** Allows bulk updates to campaign member records, including:
 - Contact information (First Name, Last Name, Email)
 - Function and Contact Role assignments
 - NPS Type and Episode categories
 - Frontline Employee assignments
- Filtering Capabilities:** Provides filtering by:
 - Frontline Employee
 - Parent Account
 - Account Name
 - Region
 - Manager of Frontline Employee
- Campaign Member Status Management:**
 - Ability to reject campaign members from participation
 - Ability to add previously rejected members back to the campaign
- Contact Management:**
 - Add new contacts to the campaign
 - Update contact information directly from the interface
 - Mark contacts as inactive when needed

11.2 User Interface Features

- Row-Level Action:** Update Frontline Employee: Opens a lookup dialog to assign or change the Frontline Employee
- Bulk Actions:**
 - Select multiple records for batch processing
 - Reject selected members (changing their Nomination Status to "Rejected")
 - Add back previously rejected members (changing their Nomination Status to "Added")

11.3 Integration with NPS Process

The "Magic Tool" integrates with the overall NPS process as follows:

- Pre-Survey Preparation:** Allows NPS team and Sales Managers to review and refine campaign member data before initiating the survey send process.
- Frontline Employee Assignment:** Ensures that the appropriate employee is assigned as the relationship owner for follow-up purposes.
- Record Rejection and Reclusion:** Allows unsuitable contacts to be excluded from the NPS campaign, and reincluded back.

