

Sales'Up Questionnaire management for Creatio

When survey management is quick and easy
01.01.2024

Sales'Up Questionnaire management for Creatio allows you to easily keep information about questionnaires and surveys inside and outside the company in the system.

The functionality allows you to create a survey with different answer options, launch certain business processes depending on the selected answer, configure the display of questionnaires to see the full picture of the questionnaire, and quickly receive analytics on the conducted surveys in the system.

It will be useful for any company or organization that seeks to effectively collect information through surveys on various aspects of its operations.

The screenshot displays the 'Questionnaire Manager' interface in Creatio. The left sidebar shows navigation options: 'Contacts', 'Interviews', and 'Questionnaires'. The main area is titled 'Interview №88' and shows a comparison of two interviews, 'Interview №89' and 'Interview №90'. The interface includes a search bar, a 'CLOSE' button, and an 'ACTIONS' dropdown. The 'INTERVIEW' tab is selected, showing a table of questions and answers for both interviews.

Question	Interview №89	Interview №90
Do you use SalesUp products?	<input type="radio"/> Yes	<input type="radio"/> Yes
What products do you use?	<input checked="" type="checkbox"/> Catalog selection enhancements for Creatio <input checked="" type="checkbox"/> Scoring models for Creatio <input checked="" type="checkbox"/> Questionnaire management for Creatio	<input checked="" type="checkbox"/> Scoring models for Creatio <input checked="" type="checkbox"/> Vacation requests for Creatio
What is your favorite SalesUp product?	Questionnaire management for Creatio	Scoring models for Creatio
State the benefits of our products		Cool
Date when the product was last used	7/25/2023	7/24/2023
Out of 10 points, how cool are SalesUp products?	15	10

Main capabilities and utilization options

Flexible configuration of surveys:

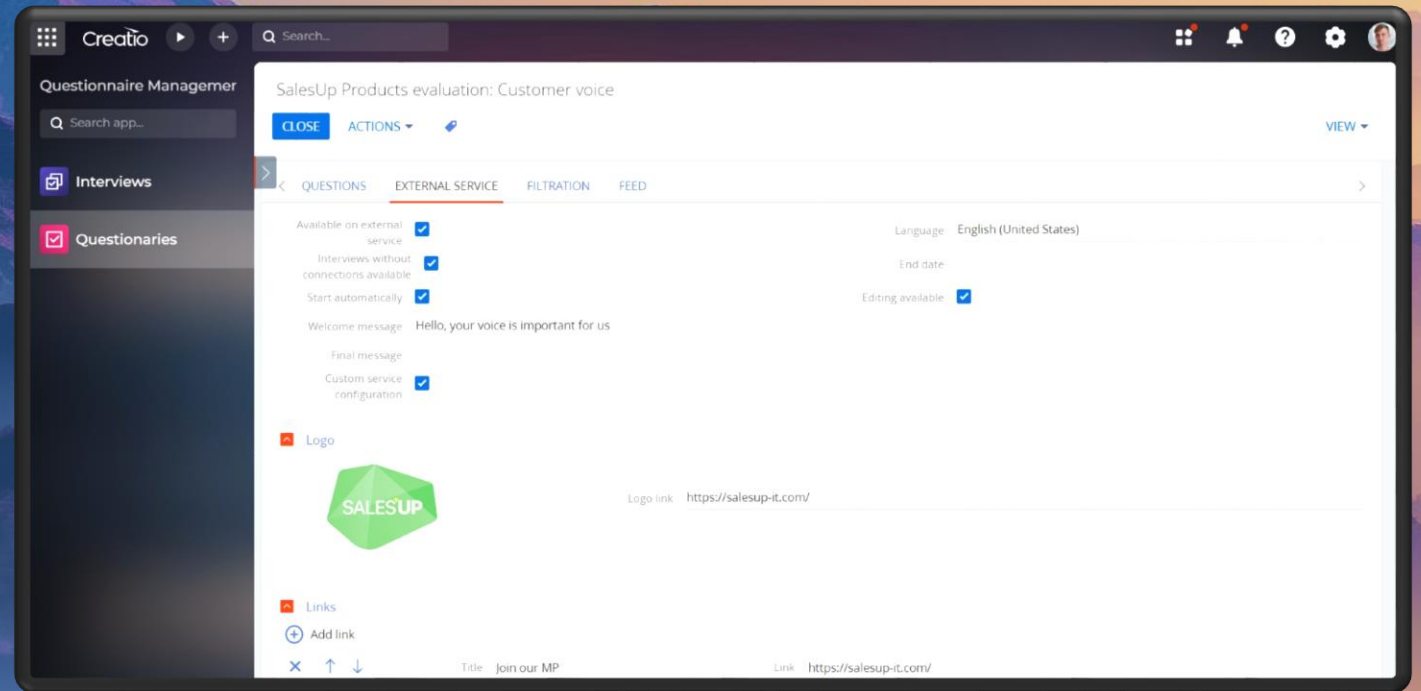
- Create questionnaires with different types of questions, including open and closed, single and multiple choice, scales and many others. This allows you to adapt the survey to specific needs and tasks.
- Running business processes according to the selected answers.
- Automation of the processing of received answers, the ability to quickly and effectively respond to the results of the questionnaire.

The screenshot displays the Creatio Questionnaire Manager interface. The main window shows the configuration for a survey titled "Evaluation of impressions from the Questionnaire management for Creatio (demo)". The interface includes a sidebar with navigation options: "Contacts", "Interviews", and "Questionnaires". The main content area shows the survey details, including the name, description, and a list of questions. A dropdown menu is open, showing "Customer voice" and "Evaluation of the support service". Below the questions, a table lists the survey items with their positions, question text, and various configuration options.

Position	Question	Registration for the workshop	Is initial	Is required	Next question	Score mark
0	What industry do you work in?	9. Switch	Yes	Yes		0.00
1	Other (please specify)	1. Short text	No	No		0.00
2	How did you find out about Questionnaire Management for Creatio?	9. Switch	No	Yes		0.00
3	Other (please specify)	1. Short text	No	No		0.00
4	You plan to use the product for:	10. Multiple choice	No	No		0.00
+	5 Rate the product according to the following factors:	0. Group	No	No		0.00

Flexible configuration of surveys

- Ability to change the order of questions in the survey, providing a logical and convenient structure.
- Ability to insert, delete and edit questions in real time.
- Configuring the display of various questionnaires depending on the user parameters, territory or other criteria.
- Adding personalized elements to improve engagement with different groups of respondents.



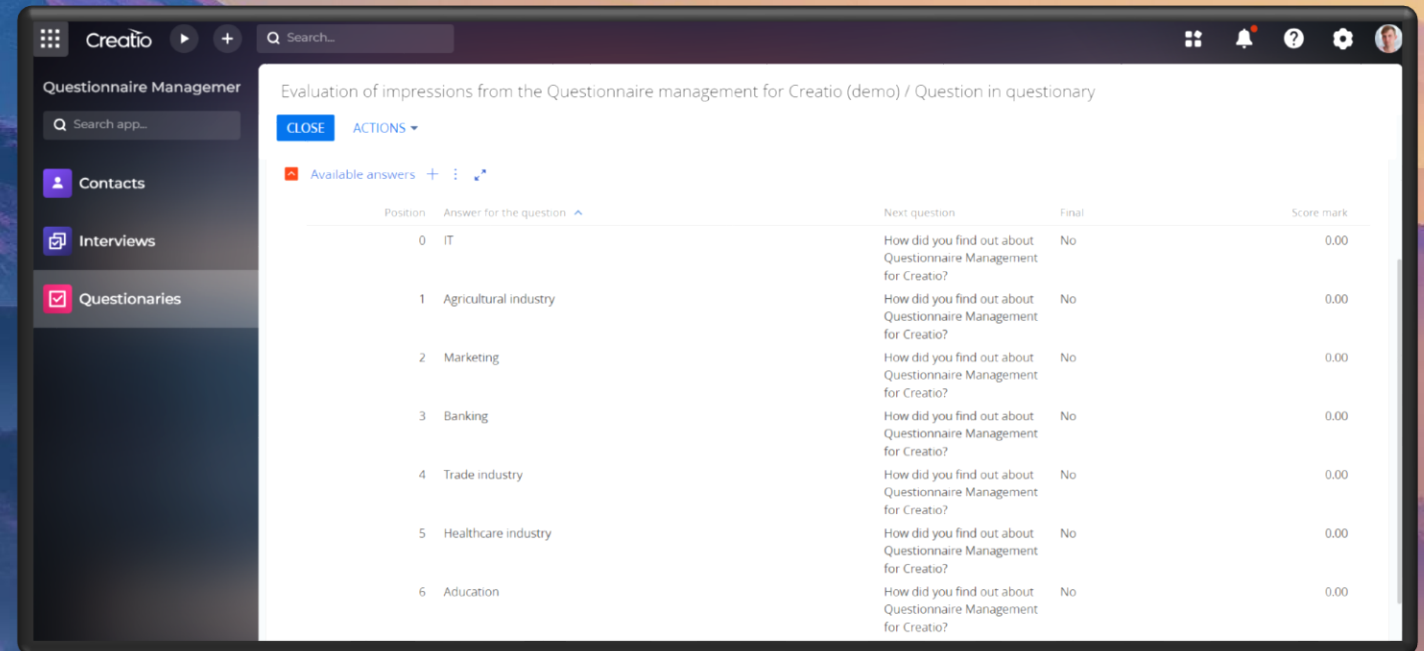
Versatility of utilization:

Internal employee surveys:

- Enables effective discussion and feedback collection within the company to improve internal processes and work environment.

Survey of customers by managers using calls:

- It is used to conduct detailed questionnaires during telephone interactions with customers, helping to understand their needs and impressions.



The screenshot displays the Creatio Questionnaire Manager interface. The left sidebar shows navigation options: Questionnaire Manager, Contacts, Interviews, and Questionnaires. The main content area shows a table of survey results for a questionnaire titled "Evaluation of impressions from the Questionnaire management for Creatio (demo) / Question in questionnaire". The table has columns for Position, Answer for the question, Next question, Final, and Score mark. The data shows that all respondents from various industries (IT, Agricultural industry, Marketing, Banking, Trade industry, Healthcare industry, and Aducation) answered "No" to the question "How did you find out about Questionnaire Management for Creatio?" and received a score mark of 0.00.

Position	Answer for the question	Next question	Final	Score mark
0	IT	How did you find out about Questionnaire Management for Creatio?	No	0.00
1	Agricultural industry	How did you find out about Questionnaire Management for Creatio?	No	0.00
2	Marketing	How did you find out about Questionnaire Management for Creatio?	No	0.00
3	Banking	How did you find out about Questionnaire Management for Creatio?	No	0.00
4	Trade industry	How did you find out about Questionnaire Management for Creatio?	No	0.00
5	Healthcare industry	How did you find out about Questionnaire Management for Creatio?	No	0.00
6	Aducation	How did you find out about Questionnaire Management for Creatio?	No	0.00

Versatility of utilization:

Filling out questionnaires in the mobile application:

- Enables customers and employees to interact with surveys conveniently and mobile, even outside the office.

Questionnaires on the Creatio portal:

- Integrated with the Creatio portal for convenient surveying and customer interaction through the web interface.

The screenshot displays the Creatio mobile application interface for configuring a questionnaire. The top navigation bar includes the Creatio logo, a search bar, and utility icons. The main content area is titled "SalesUp Products evaluation: Customer voice / Question in questionnaire" and features a "SAVE" button, a "CANCEL" button, and an "ACTIONS" dropdown menu. The questionnaire configuration details are as follows:

- Question:** Out of 10 points, how cool are SalesUp products?
- Name:** 6
- Answer type:** 3. Integer number
- Is initial:**
- Is required:**

The "Next question" section lists various question types:

0. Group
1. Short text
10. Multiple choice
11. Files
2. Long text
3. Integer number
4. Fractional number
5. Date
6. Date time
7. Time
8. Drop down list
9. Switch

Below the list, there is a section for "ANSWERS" with a sub-section for "Available answers".

Versatility of utilization:

External surveys:

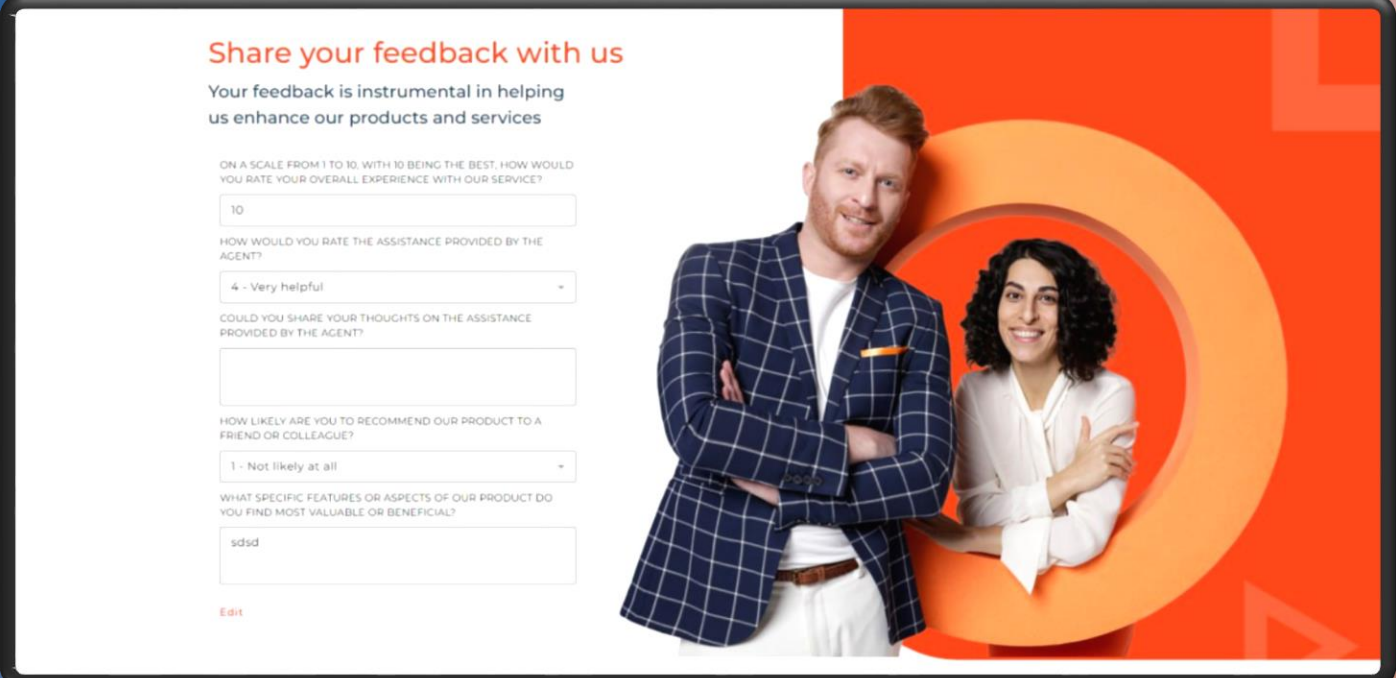
- It is used to conduct surveys among external audiences, even those who do not have direct access to the system.

Industry usecase:

- Suitable for a variety of industries including retail, customer service, manufacturing and more.

Analytics and reports:

- Provides an opportunity for complex analysis and reporting, which helps to study and improve various aspects of activity.



Share your feedback with us

Your feedback is instrumental in helping us enhance our products and services

ON A SCALE FROM 1 TO 10, WITH 10 BEING THE BEST, HOW WOULD YOU RATE YOUR OVERALL EXPERIENCE WITH OUR SERVICE?

HOW WOULD YOU RATE THE ASSISTANCE PROVIDED BY THE AGENT?

COULD YOU SHARE YOUR THOUGHTS ON THE ASSISTANCE PROVIDED BY THE AGENT?

HOW LIKELY ARE YOU TO RECOMMEND OUR PRODUCT TO A FRIEND OR COLLEAGUE?

WHAT SPECIFIC FEATURES OR ASPECTS OF OUR PRODUCT DO YOU FIND MOST VALUABLE OR BENEFICIAL?

[Edit](#)

Case survey for collecting feedback from customers



Examples of industry usecase
Sales'Up Questionnaire Management for Creatio

Retail

- Studying the level of customer satisfaction
- Collection of feedback on service and products
- Evaluation of the effectiveness of advertising campaigns
- Studying the opinions of customers about new products
- Evaluation of the competitiveness of the assortment
- Marketing research before introducing a new product
- Survey of sellers in retail outlets by sales representatives
- Collection of information on the level of satisfaction with the service

Financial institutions

- Studying the level of customer satisfaction
- Collection of feedback on service and service quality
- Evaluation of the effectiveness of advertising campaigns
- Studying the opinions of customers regarding new financial products
- Assessment of risks and investment needs of clients
- Evaluation of the level of informativeness of customers
- Evaluation of the effectiveness of online banking
- Study of client preferences and expectations

IT companies

- Conducting surveys among employees to improve the working environment
- Survey for new ideas for product development
- Gathering feedback from users on new software features
- Internal evaluation of the level of knowledge of employees
- Evaluation of project management processes
- Study of IT security and countermeasures against cyber threats
- Evaluation of the level of satisfaction of corporate clients

HR

- Conducting internal surveys to measure employee satisfaction
- Evaluation of the effectiveness of educational programs
- Collection of feedback about the activities carried out by the company
- Evaluation of the onboarding process of new employees
- Assessment of professional growth and development
- Collection of wishes of employees to complete educational programs or professional courses

Pharmaceutical companies

- Carrying out external surveys among doctors and patients to study the demand for new medical products and evaluate their effectiveness
- Evaluation of the satisfaction of medical workers
- Evaluation of the effectiveness of the work of sales representatives
- Assessment of knowledge and preferences of doctors regarding new medical technologies
- Study of needs in pharmacy networks
- Evaluation of consumer experience in the use of medicinal products
- Evaluation of the effectiveness of marketing activity in the pharmacy chain

Educational institutions

- Conducting surveys among students regarding the effectiveness of educational programs
- Determining students' interest in participating in extracurricular activities
- Conducting external surveys among potential students of courses or trainings to register for a trial class
- Testing the level of knowledge of new students for effective grouping
- Conducting student testing after blocks or course topics

E-commerce

- Studying customers' opinions about the effectiveness of the website interface
- Determination of demand for new goods and shares
- Evaluation of customer satisfaction after making a purchase
- Evaluation of the convenience and speed of placing an order through a web form or website
- Study of consumer dynamics and changes in consumption
- Evaluation of the effectiveness of advertising campaigns

Agro-industrial sector

- Survey of farmers on the use of new technologies and herbicides
- Analysis of needs for improving agricultural productivity
- Assessment of customer satisfaction with agricultural products
- Monitoring the state of field work
- Plant health monitoring
- External surveys of suppliers of agricultural products
- Assessment of working conditions and staff satisfaction
- Analysis of market trends to identify prospects for the development of the agricultural sector

Common usage scenarios Sales'Up Questionnaire Management for Creatio

Internal employee surveys:

- An effective tool for collecting opinions and feedback from staff.
- Simplifying the evaluation process and improving the working environment.
- Survey of employees within different departments.
- Conducting eNPS surveys to identify the level of employee satisfaction.

The screenshot displays the Creatio Questionnaire Manager interface. The left sidebar shows navigation options: Questionnaire Manager, Contacts, Interviews, and Questionnaires. The main content area shows an interview form for 'Interview No169'. The form includes a search bar, a 'CLOSE' button, and an 'ACTIONS' dropdown. The form is divided into 'Question' and 'Answer' columns. The questions and their corresponding answers are:

Question	Answer
What position do you hold in the company?	<input type="radio"/> Senior executive officer (SEO) <input type="radio"/> Middle manager <input checked="" type="radio"/> Head of the department <input type="radio"/> Team lead <input type="radio"/> Expert position without management functions <input type="radio"/> Intern / Junior
How long have you been with the company?	3-5 years
How satisfied are you with your job at the company?	<input type="radio"/> Extremely satisfied <input checked="" type="radio"/> Satisfied <input type="radio"/> Hard to answer <input type="radio"/> I don't want to answer <input type="radio"/> Dissatisfied <input type="radio"/> Extremely dissatisfied
What do you like most about the company?	I like the support of my colleagues and possibi

Survey of customers by managers using calls:

- A convenient tool for studying the impressions of customers during telephone conversations.
- Ability to respond immediately to customer needs and feedback.

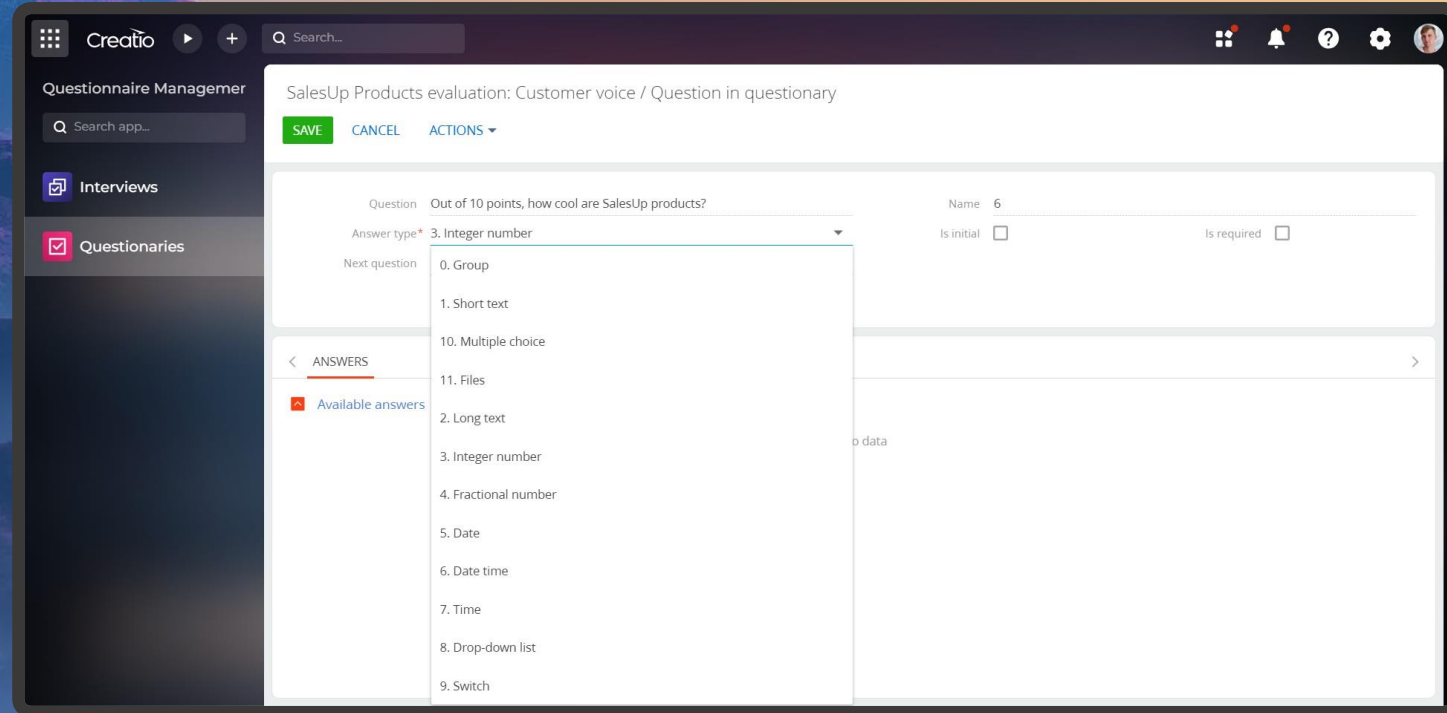
Bank assessment of service quality (demo)
Your opinion is very important to us.

Question	Answer
How would you rate your overall satisfaction with our bank's services?	I would rate my overall satisfaction as 8 out of 10. I have been consistently impressed with the promptness and efficiency of your customer service. The online banking platform is user-friendly and reliable, which makes managing my finances convenient. However, I believe there's room for improvement in the variety of investment products offered. Expanding these options would enhance my banking experience.
When did you last visit one of our branches?	11/20/2023
Which service did you use during your last visit?	Depositing money into an account
What factors are important to you when choosing a bank? (Select multiple options)	<input checked="" type="checkbox"/> Branch locations <input checked="" type="checkbox"/> Availability of online services <input type="checkbox"/> Customer service <input type="checkbox"/> Interest rates <input type="checkbox"/> Other
When did you last use our online	11/20/2023

Case survey on satisfaction with the bank's service

Filling out questionnaires in the mobile application:

- Mobility and accessibility for employees who are remote or frequently on the road.
- Ease of integration of the received data into the system.



The screenshot displays the Creatio mobile application interface for configuring a questionnaire. The top navigation bar includes the Creatio logo, a search bar, and utility icons. The main content area is titled "SalesUp Products evaluation: Customer voice / Question in questionnaire" and features a "SAVE" button, a "CANCEL" button, and an "ACTIONS" dropdown menu.

The questionnaire configuration details are as follows:

- Question:** Out of 10 points, how cool are SalesUp products?
- Name:** 6
- Answer type:** 3. Integer number
- Is initial:**
- Is required:**

A dropdown menu for "Next question" is open, showing a list of available answer types:

- 0. Group
- 1. Short text
- 10. Multiple choice
- 11. Files
- 2. Long text
- 3. Integer number
- 4. Fractional number
- 5. Date
- 6. Date time
- 7. Time
- 8. Drop-down list
- 9. Switch

The "ANSWERS" section is currently empty, with a red "x" icon and the text "Available answers" indicating that no answers have been defined for this question.

Questionnaires on the Creatio portal:

- Convenient interface for customers who interact with the Creatio portal.
- Ensuring a continuous flow of online feedback.

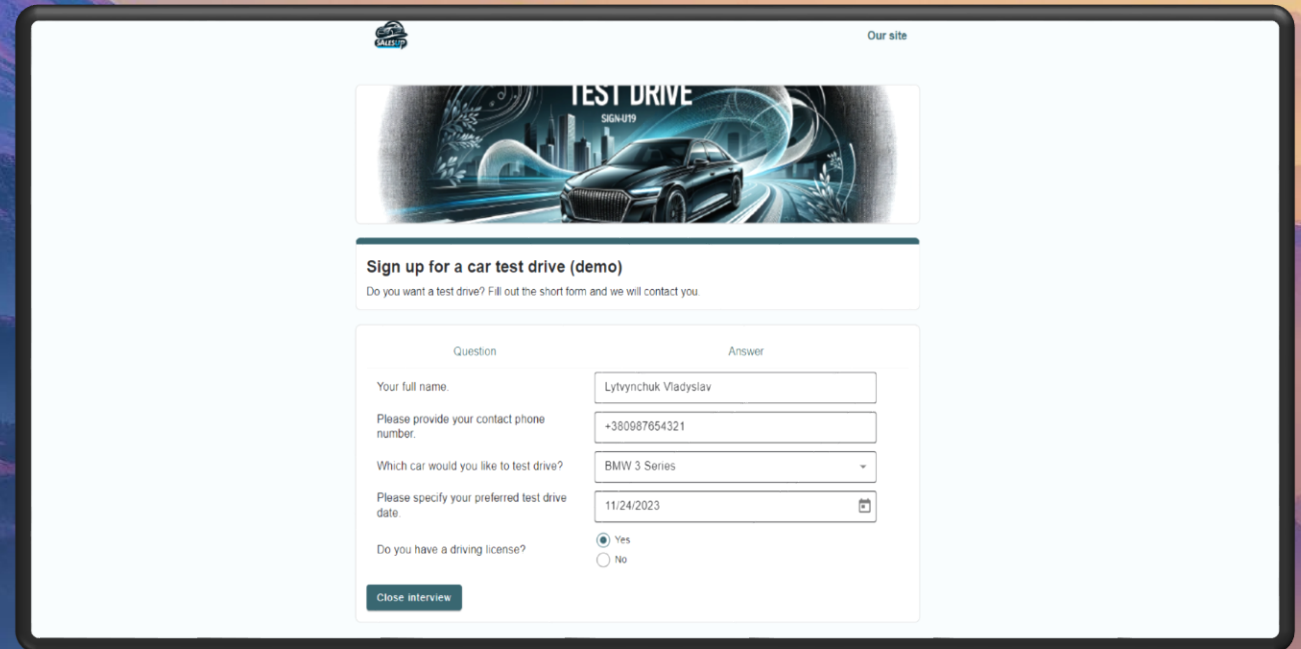
The screenshot displays a web interface for a survey titled "Dedicated team and Product Owner customer service satisfaction survey - SU dedi...". The interface includes a navigation menu on the left with options like Home, Portal Cases, Portal Knowledge base, and Portal Interviews. The main content area shows a list of survey questions with radio button options for responses. The questions and their corresponding options are:

Question	Answer
How would you rate your overall level of satisfaction with our company's services?	<input type="radio"/> Very satisfied
How would you rate the speed and efficiency of responses to your requests?	<input type="radio"/> Very satisfied
In your opinion, how good the responses provided by our customer support team are?	<input type="radio"/> Very good
How well did our support team understand your issues or requests?	<input type="radio"/> Very good
How would you rate the professionalism and knowledge of our support team?	<input type="radio"/> Very professional and knowledgeable
How would you rate the accessibility of the contact modes with our support team (whatsapp, email, portal)?	<input type="radio"/> Very accessible
How would you rate the usability of our online support tools and platform (portal)?	<input type="radio"/> Very convenient
Do our services meet your expectations?	<input type="radio"/> Yes, in full

At the bottom of the survey, there is a text input field for the question: "What processes do you think should be improved on the part of the Bank".

External surveys:

- The possibility of conducting surveys for an audience that does not have direct access to the system.
- Use for market research, feedback collection or external analysis.
- A tool for attracting potential and current customers to company events (workshops, webinars, etc.).



The screenshot shows a web form titled "TEST DRIVE" with a "SIGN UP" button. Below the title is a sub-header "Sign up for a car test drive (demo)" and a short instruction: "Do you want a test drive? Fill out the short form and we will contact you". The form is structured as a table with two columns: "Question" and "Answer".

Question	Answer
Your full name.	Lytvynchuk Vladyslav
Please provide your contact phone number.	+380987654321
Which car would you like to test drive?	BMW 3 Series
Please specify your preferred test drive date.	11/24/2023
Do you have a driving license?	<input checked="" type="radio"/> Yes <input type="radio"/> No

At the bottom of the form is a "Close interview" button.

The case of registration for a test drive through an external survey

Survey settings:

evaluation of products during a visit to sales points and the launch of the process of creating activity for the manager after the completion of the survey.

The screenshot displays the 'Assesment of products' configuration page in the Creatio Questionnaire Manager. The interface includes a sidebar with 'Interviews' and 'Questionnaires' options. The main content area shows the survey details:

- Name: Assesment of products
- Description: The ones that are in use
- Display the entire sequence of questions:
- Not active:
- Interviews category: [empty]
- Process: Analysis of products sold

Below the form, there is a table of questions in the questionnaire:

Name	Position	Question	Answer type	Is initial	Is required	Next questi...	Score mark
Date when the product was last used	0	Date when the product was last used	5. Date	No	No		0.00
Level of product satisfaction	1	Level of product satisfaction	8. Drop-down list	No	No	Comment on level of product satisfaction	0.00
Comment on level of product satisfaction	2	Comment on level of product satisfaction	1. Short text	No	No		0.00
Select the type of product that sells the least	3	Select the type of product that sells the least	10. Multiple choice	No	No		0.00
Choose the type of	4	Choose the type of product that sells the	10. Multiple choice	No	No		0.00

The setup time for the **Questionnaire management for Creatio** product is 20 minutes.

Setting up an external survey:

satisfaction of the client after completing the application. The interview should be created in the system only after the client clicks on the survey link.

The screenshot displays the Creatio interface for configuring an external survey. The main window is titled "Assess the level of fulfillment of the request" and includes a "CLOSE" button and an "ACTIONS" menu. Below the title, there are fields for "Name", "Description", "Interviews category" (set to "Customer voice"), and "Process". A table lists the survey questions with their positions, descriptions, answer types, and scoring details.

Name	Position	Question	Answer type	Is initial	Is require...	Next que...	Score mark
Indicate the level of satisfaction with the resolution of the appeal	0	Indicate the level of satisfaction with the resolution of the appeal	8. Drop-down list	No	Yes	Comment for evaluation or improvement	0.00
Comment for evaluation or improvement	1	Comment for evaluation or improvement	2. Long text	No	No		0.00
Details of the service provided	2	Details of the service provided	0. Group	No	No		0.00
Evaluate the quality of communication on the appeal	0	Evaluate the quality of communication on the appeal	8. Drop-down list	No	No		0.00
Evaluate the speed of providing a solution to the appeal	1	Evaluate the speed of providing a solution to the appeal	8. Drop-down list	No	No		0.00
Are you satisfied with the use of our products?	3	Are you satisfied with the use of our products?	8. Drop-down list	No	Yes		0.00

To the right, a preview of the survey form is shown, titled "Assess the level of fulfillment of the request". It contains the following questions and answers:

- Indicate the level of satisfaction with the resolution of the appeal: 5
- Comment for evaluation or improvement: Satisfied
- Details of the service provided: Evaluate the quality of communication on the appeal: 5
- Evaluate the speed of providing a solution to the appeal: 5
- Are you satisfied with the use of our products?: Yes

At the bottom right, there are several checkboxes for configuration options:

- Mobile data sorting
- Data views
- Custom URLs
- Enhanced template macros
- Quick filters
- Purchases
- Text fields autofill

The setup time for the **Questionnaire management for Creatio** product is 40 minutes.

Questionnaire settings:

to register for an event (conference, training, screening) and initiate the process of sending a contact a notification about the event after completing the survey.

The screenshot shows the Creatio Questionnaire Manager interface for a questionnaire titled "Conference sales market 2024". The interface includes a sidebar with "Questionnaire Manager", "Interviews", and "Questionaries". The main area displays the questionnaire settings, including the name, description, and process. The "Process" field is set to "Check the contact and send an invitation". Below the settings, there is a table of questions.

Name	Position	Question	Answer type	Is initial	Is required	Next questi...	Score mark
Name and surname	0	Name and surname	2. Long text	No	Yes		0.00
Email	1	Email	2. Long text	No	Yes		0.00
Your company	2	Your company	1. Short text	No	No		0.00

The setup time for the **Questionnaire management for Creatio** product is 40 minutes.

What's new?

External surveys

- Ability to take surveys to external users who are not users of Creatio or the portal.
- Clients are sent individual links to the service where they can answer questions, all answers are stored in system polls.

Saving intermediate results

- When changing the answer to a question in the survey, it is immediately saved in the system without the need to press additional buttons.

Process launch

- Ability to specify a process that will be launched after the survey is completed. For example, fill in the survey contact with the Email specified in one of the answers or send a notification to the client after completing the survey.

Survey categories

- For the survey, you can specify a Category (Evaluation of the service, Registration for the event, Collection of results) for building analytics or filtering in the future.

Editing answers

- Ability to edit answers after completing the survey.

Thanks!

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