

# Survey forms

## Survey Forms (Genesys Cloud Quality Management)

Section	Description
Module Context	Part of <b>Quality Management and Voice of the Customer</b> capabilities in Genesys Cloud.
Purpose	Allows organizations to collect <b>customer feedback after interactions</b> using web-based surveys such as CSAT and NPS.
Admin Location	<a href="#">Admin</a> → <a href="#">Quality</a> → <a href="#">Survey Forms</a>
Key Requirement	Survey invitations require <b>Survey Invite Flow in Architect</b> and a <b>Quality Policy</b> to trigger survey delivery.

Survey Forms enable organizations to measure **customer satisfaction, service quality, and customer sentiment** following interactions. They are typically triggered through policies and Architect flows.

## Study Notes

Topic	Explanation
Survey Forms	Templates used to collect feedback from customers after interactions.
Survey Invite Flow	Architect flow responsible for sending the survey invitation email or message.
Policies	Determine which interactions trigger surveys.
Question Types	Multiple Choice, Yes/No, Range, Free Text, and Net Promoter Score (NPS).
NPS Limit	Only <b>one NPS question</b> can be used per survey.

Topic	Explanation
Survey Language	Determines language of the survey displayed to the customer.
Header Section	Displays instructions, images, or branding above survey questions.

Survey feedback helps contact centers monitor customer satisfaction and identify areas for service improvement.

# Navigation

Task	Navigation
Create survey form	Admin → Quality → Survey Forms → Create
Edit survey form	Admin → Quality → Survey Forms → Select Form
Publish survey form	Admin → Quality → Survey Forms → Publish
Configure survey invite flow	Architect → Survey Invite Flow
Configure survey policies	Admin → Quality → Policies

# Configuration Fields (UI Form Fields)

## Survey Form Creation

Field	Description	Options
Create	Creates new survey form	Button
Survey Language	Language used for the survey	Dropdown
Survey Form Name	Internal survey identifier (not visible to customers)	Text
Header	Instructional text or image displayed to customer	Text / Image

Field	Description	Options
Add Question	Adds a survey question	Button
Save	Saves draft survey form	Button
Publish	Publishes survey form	Button

## Question Configuration

Field	Description	Options
Question Type	Defines format of survey question	Multiple Choice / Yes-No / Range / Free Text / NPS
Question Text	Question shown to the customer	Text
Help Text	Optional guidance for question	Text
Required	Makes question mandatory	Toggle
Answer Options	Choices available for customer response	Text
Range Scale	Numeric scale used for rating	1-5 or custom range
NPS Question	Measures customer loyalty	0-10 scale
Delete Question	Removes question	Button
Reorder Questions	Change question order	Drag and drop

## Dependencies

Component	Purpose
Architect	Sends survey invitations through survey invite flow
Policies	Determine which interactions trigger surveys
Interaction Recording	Optional integration with quality monitoring
Customer Contact Data	Used to deliver survey invitation

# Platform Integration / Related Components

Component	Relationship
Architect Survey Invite Flow	Sends survey invitation email or message
Quality Policies	Automates survey triggers
Evaluation Forms	Complement surveys with internal quality scoring
Speech & Text Analytics	Analyze feedback trends
Customer Journey Analytics	Combine survey feedback with interaction analytics

# Related Topics / Further Reading

Topic	Purpose
Evaluation Forms	Internal agent evaluation
Quality Policies	Automate survey delivery
Architect Flows	Configure survey invitation workflow
Speech Analytics	Analyze conversation sentiment
Gamification	Use feedback metrics to motivate agents

# Implementation Checklist

Step	Status
Create survey form	<input type="checkbox"/>
Add survey questions	<input type="checkbox"/>

Step	Status
Publish survey form	<input type="checkbox"/>
Create Architect survey invite flow	<input type="checkbox"/>
Configure survey policy	<input type="checkbox"/>
Test survey delivery	<input type="checkbox"/>
Review survey analytics	<input type="checkbox"/>

# Implementation Guide

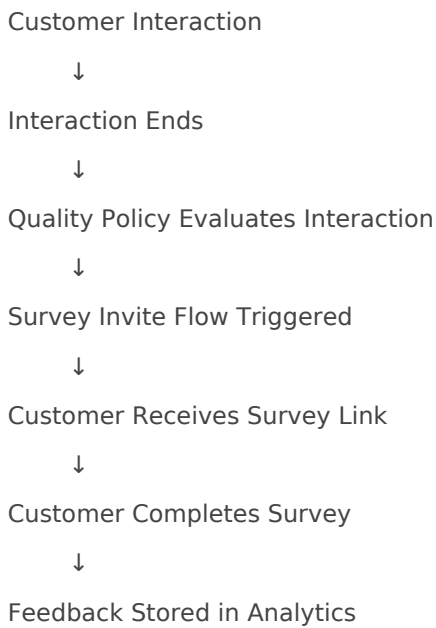
Step	Action
Step 1	Navigate to <a href="#">Admin → Quality → Survey Forms</a>
Step 2	Click <b>Create</b>
Step 3	Select survey language
Step 4	Enter survey form name
Step 5	Add header instructions
Step 6	Add survey questions
Step 7	Save survey form
Step 8	Publish survey form
Step 9	Configure Architect survey invite flow
Step 10	Create policy to trigger surveys

# How to Implement

Phase	Description
Survey Creation	Create survey form and questions
Workflow Setup	Configure Architect survey invite flow
Policy Configuration	Trigger surveys based on interaction criteria
Testing	Validate survey delivery
Monitoring	Review survey results and customer feedback

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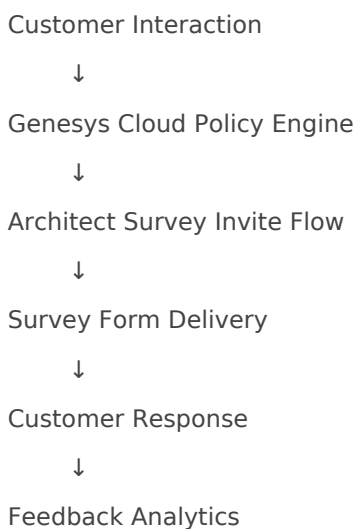
# Workflow



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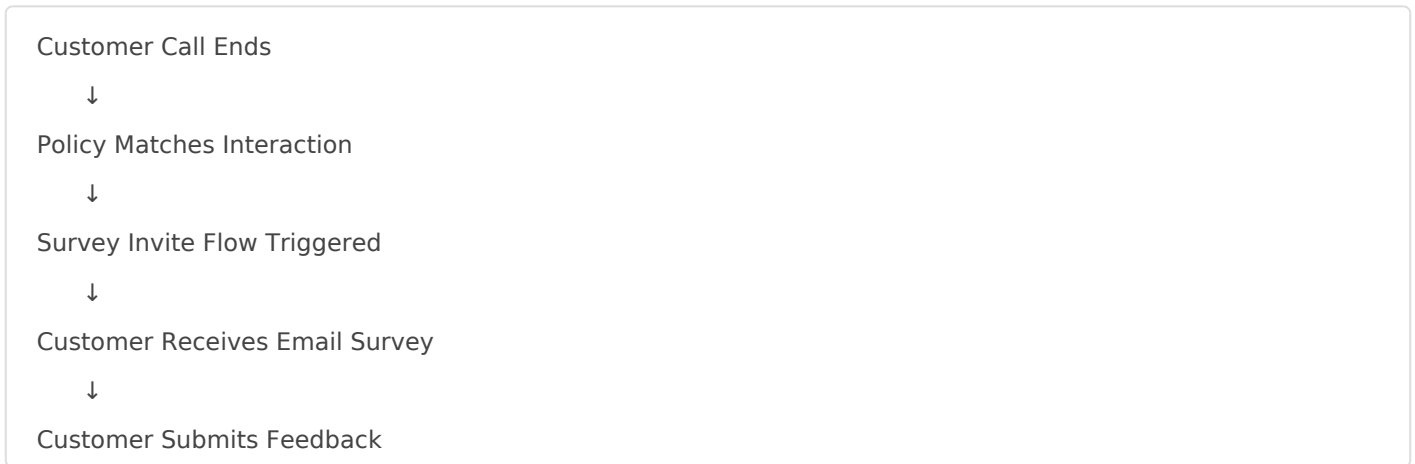
# Architecture Diagrams

## Survey Delivery Architecture

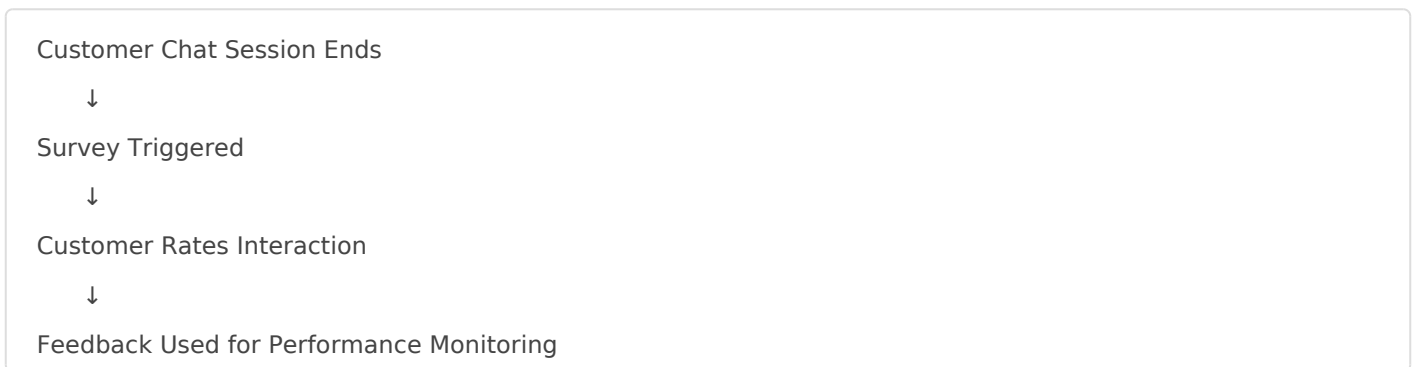


# Real Flow Scenarios

## Post Call Survey



## Customer Experience Monitoring



## Usage Scenarios

Scenario	Description
Post Interaction Survey	Collect CSAT after call/chat/email
Net Promoter Score	Measure customer loyalty
Service Quality Monitoring	Identify customer dissatisfaction

Scenario	Description
Product Feedback	Collect insights on services
Customer Experience Tracking	Monitor long-term service trends

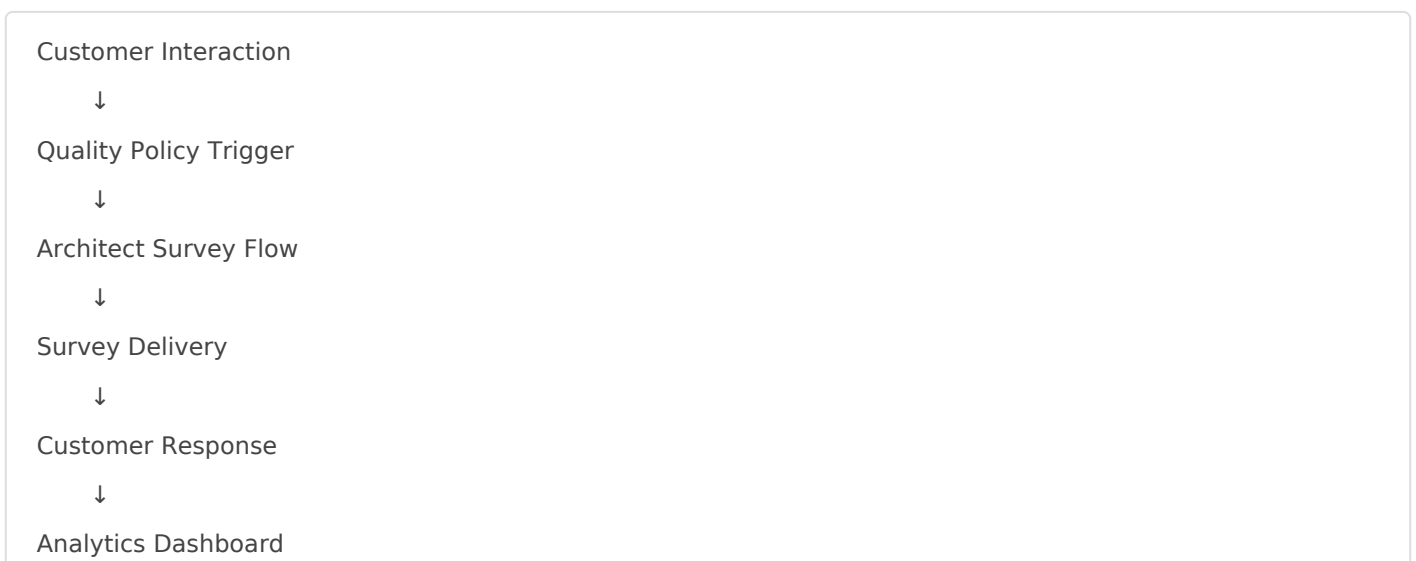
# Implementation Examples

Survey Type	Example
CSAT Survey	Rate your support experience
NPS Survey	How likely are you to recommend our service
Product Feedback Survey	Rate product knowledge of agent
Customer Experience Survey	Rate overall interaction quality

## Example Survey Structure

Question	Type
How satisfied are you with our service?	Range
Was your issue resolved?	Yes / No
What could we improve?	Free Text

# Design Example



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# Best Practices

Practice	Reason
Keep surveys short	Improve completion rate
Limit number of questions	Avoid survey fatigue
Use NPS for loyalty tracking	Standard industry metric
Combine surveys with evaluations	Complete quality monitoring
Test survey flows before production	Ensure delivery reliability

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# Naming Convention

Resource	Example
Survey Form	Post_Call_CSAT
Survey Policy	Inbound_Call_Survey_Policy
Survey Flow	Customer_Survey_Flow

Naming Pattern:

<InteractionType>\_<Purpose>\_Survey

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# Security Considerations

Control	Description
Data Privacy	Protect customer responses
Access Permissions	Restrict survey editing rights
Data Retention	Define retention policies for feedback
Compliance	Ensure survey questions meet regulatory standards

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# Limitations / Constraints

Constraint	Description
NPS Limit	Only one NPS question allowed per survey
Survey Trigger	Requires Architect survey invite flow
Policy Scope	Applies only to interactions after activation
Survey Delivery	Depends on valid customer contact information

# Troubleshooting

Issue	Cause	Resolution
Survey not sent	Policy not configured	Verify policy rules
Survey invite flow not triggered	Architect flow misconfiguration	Validate flow logic
Customer not receiving survey	Missing contact information	Verify customer email or messaging channel
Survey responses missing	Survey not published	Publish survey form

# Interview Cheat Sheet

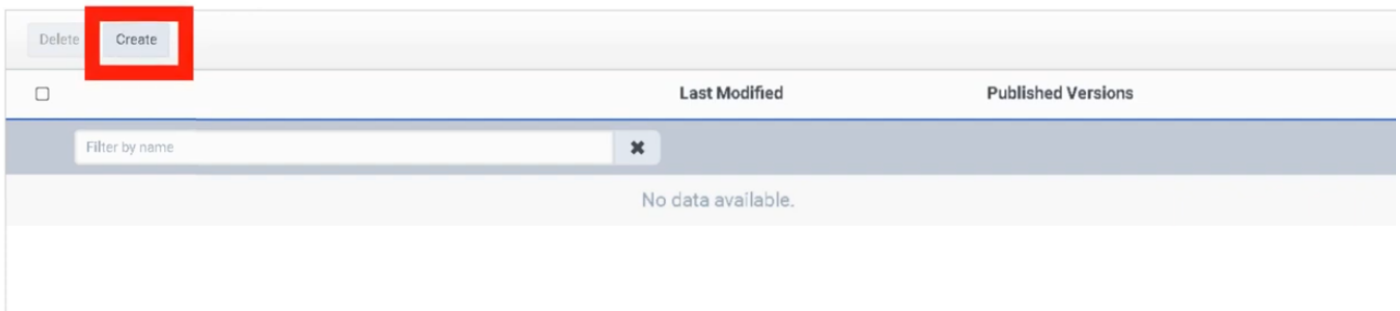
Question	Answer
What is a Survey Form in Genesys Cloud?	A form used to collect customer feedback after interactions.
What is required to send surveys?	Survey form, survey invite flow in Architect, and a quality policy.
What question types are supported?	Multiple choice, Yes/No, Range, Free text, and NPS.
How many NPS questions can a survey have?	Only one per survey.
When are surveys triggered?	After interactions that match a policy.

# Key Takeaways

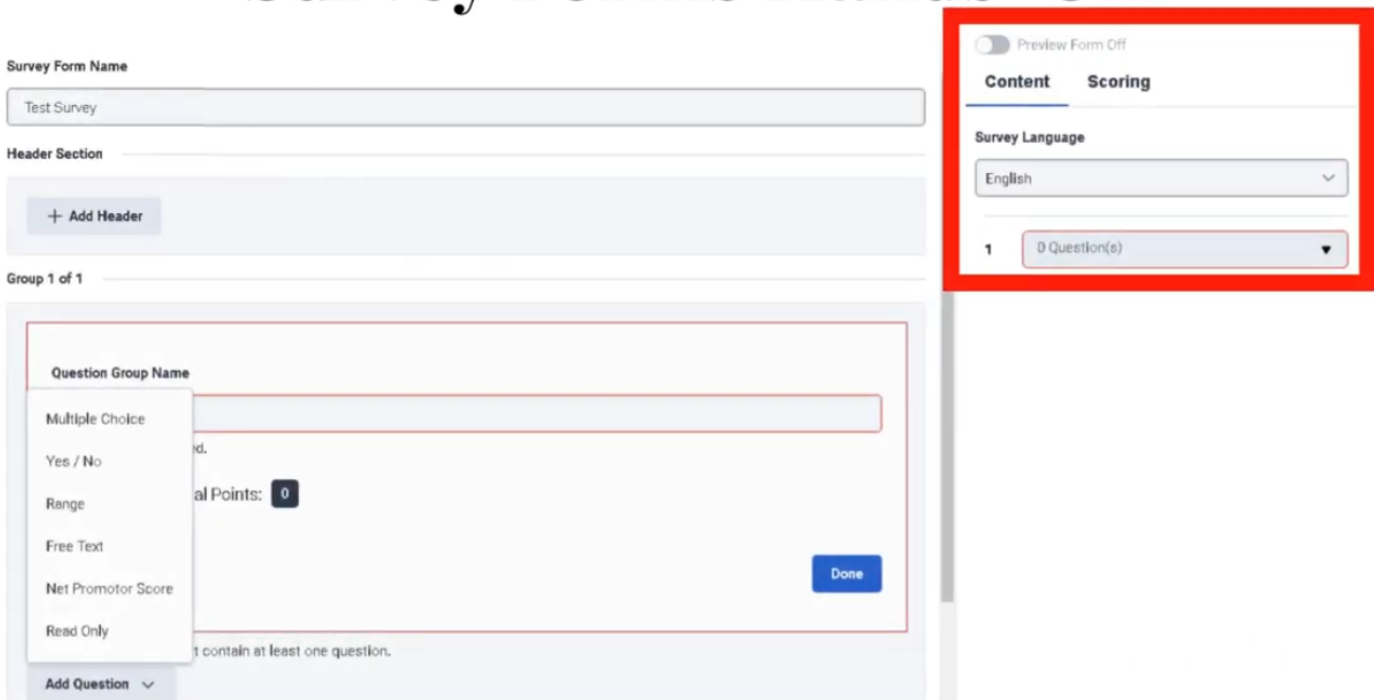
Topic	Summary
Survey Forms	Collect customer feedback after interactions
Architect Integration	Survey invite flows deliver surveys
Policies	Automate survey triggers
NPS	Measures customer loyalty
Customer Feedback	Provides insight into service quality

# Screenshots

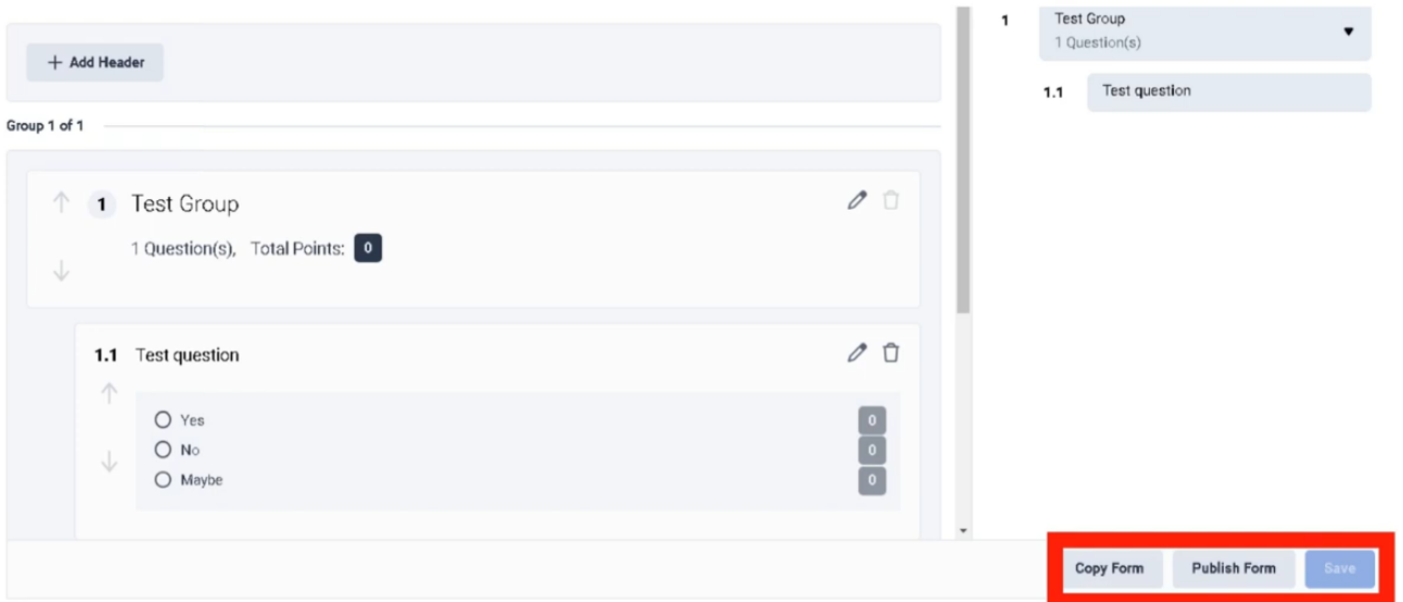
Create survey form



Select Survey Language - Preview form on would allow you to preview form



Publish to view on survey form

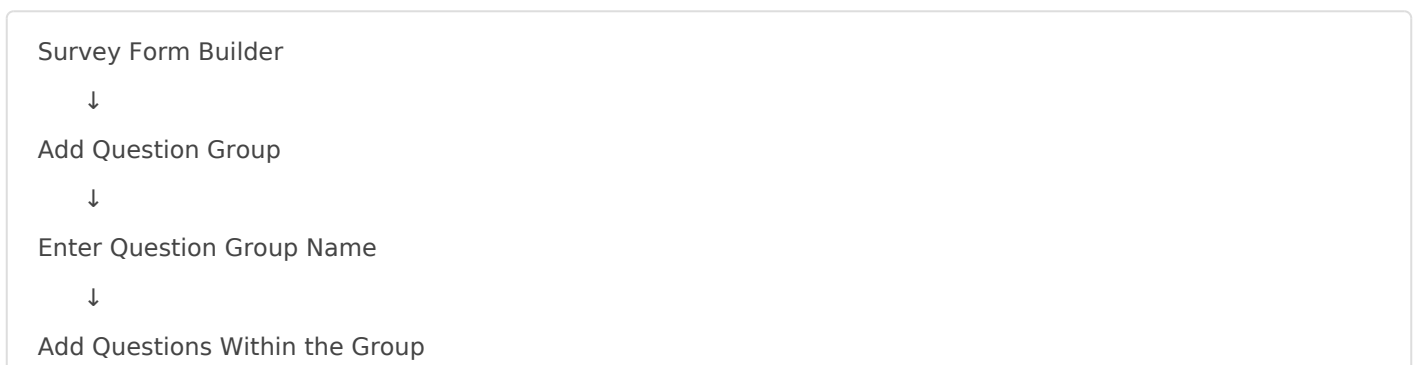


## Question Group Name

Field	Description	Implementation Purpose	Example
Question Group Name	A label used to organize related survey questions into a logical section.	Helps structure surveys into categories such as service quality, agent behavior, or product feedback.	Customer Experience

## How It Appears in the UI

When creating a survey form:



Example layout:

Survey Form: Post\_Call\_CSAT

Question Group: Customer Experience

- How satisfied are you with the service?
- Was your issue resolved?

Question Group: Agent Interaction

- Was the agent professional?
- Did the agent explain the solution clearly?

## Why Question Groups Are Important

Benefit	Explanation
Improves survey readability	Customers understand sections of the survey
Organizes feedback categories	Helps separate customer experience from product feedback
Simplifies analytics	Enables grouping of related feedback metrics

## Best Practices

Practice	Reason
Use clear group names	Makes survey easier to interpret
Limit number of groups	Avoid overwhelming customers
Group related questions only	Maintain logical structure

## Naming Examples

Group Type	Example
Customer Experience	Customer_Satisfaction
Agent Performance	Agent_Interaction
Product Feedback	Product_Feedback

## Key Implementation Tip

Keep group names **customer-friendly** if visible in the survey, and **short but descriptive** for reporting purposes.

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