



CRM Customer Feedback Collection Checklist 2026

Pre-Collection Planning & Strategy

Defining the scope of feedback, identifying key customer segments, and selecting the primary objectives for the collection campaign.

Primary Feedback Objective

Write something...

Target Customer Segments

- ☐ New Customers
- ☐ Active Subscribers
- ☐ Churned/Inactive Customers
- ☐ Enterprise/VIP Accounts
- ☐ Trial Users

Campaign Start Date

Enter date...

Success Metrics (KPIs)

Write something...

Feedback Frequency

- ☐ One-time Survey
- ☐ Monthly Pulse
- ☐ Quarterly Review
- ☐ Always-on/Trigger-based

Strategy Brief/Project Charter

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Channel & Tool Selection

Determining the optimal touchpoints for feedback, such as in-app surveys, email follow-ups, NPS tools, or direct interview methods.

Feedback Collection Channels

- ☐ Email Surveys
- ☐ In-App Popups
- ☐ SMS/Text Messaging
- ☐ Phone Interviews
- ☐ Customer Support Chat
- ☐ Social Media Polls

Primary Survey Tool

- ☐ Typeform
- ☐ SurveyMonkey
- ☐ Qualtrics
- ☐ Google Forms
- ☐ Native CRM Survey Module

Secondary Communication Tool

Write something...

Channel Implementation Notes

Write something...

Tool Evaluation Deadline

Enter date...

Survey Design & Question Architecture

Crafting unbiased, high-quality questions, selecting appropriate scales (NPS, CSAT, CES), and ensuring logical skip logic/branching.

Primary Satisfaction Metric

- ☐ Net Promoter Score (NPS)
- ☐ Customer Satisfaction Score (CSAT)
- ☐ Customer Effort Score (CES)

Likelihood to Recommend Score

Enter a number...

Features Used Most Frequently

- ☐ Dashboarding
- ☐ Automated Workflows
- ☐ Reporting & Analytics
- ☐ Contact Management

Detailed Feedback on Pain Points

Write something...

Key Driver for Score

Write something...

CRM Integration & Data Mapping

Ensuring feedback responses are automatically mapped to the correct contact, account, and opportunity records within the CRM.

Primary CRM System

- ☐ Salesforce
- ☐ HubSpot
- ☐ Microsoft Dynamics 365
- ☐ Pipedrive
- ☐ Zoho CRM
- ☐ Other

Target Data Objects to Map

- ☐ Contact Records
- ☐ Account/Company Records
- ☐ Deal/Opportunity Records
- ☐ Support Ticket History
- ☐ Activity Logs

API Endpoint/Integration URL

Write something...

Data Mapping Logic Documentation

Write something...

Schema Mapping Documentation

 Upload File

Integration Testing Completion Date

Enter date...

Survey Deployment & Automation

Setting up automated triggers based on CRM lifecycle stages, such as post-support ticket closure or post-purchase milestones.

Primary Deployment Channel

- ☐ Email Survey
- ☐ In-App Pop-up
- ☐ SMS/Mobile
- ☐ Post-Call Automated SMS

Trigger Event Criteria

- ☐ New Lead Created
- ☐ Deal Closed Won
- ☐ Support Ticket Resolved
- ☐ Contract Renewal Milestone

Survey Delay Period (Days)

Enter date...

Automation Workflow Name

Write something...

Automation Logic Documentation

 Upload File

Data Analysis & Insight Extraction

Processes for aggregating qualitative and quantitative data, identifying trends, and performing sentiment analysis.

Primary Analysis Metric

- ☐ Net Promoter Score (NPS)
- ☐ Customer Satisfaction Score (CSAT)
- ☐ Customer Effort Score (CES)

Key Trend Identified

Write something...

Summary of Qualitative Feedback

Write something...

Total Response Volume

Enter a number...

Analysis Completion Date

Enter date...

Identified Pain Points

- ☐ Product Usability
- ☐ Pricing/Billing
- ☐ Customer Support Quality
- ☐ Feature Request
- ☐ Onboarding Experience

Detailed Analysis Report

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Closing the Feedback Loop

Defining workflows for alerting account managers of negative feedback and workflows for rewarding promoters.

Feedback Severity Level

- ☐ Critical (Immediate Action Required)
- ☐ High (Follow-up within 24 hours)
- ☐ Medium (Standard Follow-up)
- ☐ Low (For Information Only)

Assigned Account Manager

Write something...

Follow-up Deadline

Enter date...

Resolution Summary

Write something...

Actions Taken

- ☐ Contacted Customer
- ☐ Logged Bug/Issue
- ☐ Applied Credit/Discount
- ☐ Escalated to Product Team
- ☐ Updated Account Record

Evidence of Resolution

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Reporting & Executive Dashboards

Creating real-time visualizations within the CRM to track customer satisfaction trends over time for stakeholders.

Dashboard Name

Write something...

Reporting Frequency

- ☐ Weekly
- ☐ Monthly
- ☐ Quarterly
- ☐ Annually

Reporting Period Start Date

Enter date...

Key Metrics to Track

- ☐ Net Promoter Score (NPS)
- ☐ Customer Satisfaction Score (CSAT)
- ☐ Customer Effort Score (CES)
- ☐ Churn Rate
- ☐ Customer Lifetime Value (CLV)

Target Audience for Dashboard

Write something...

Dashboard Design Template/Mockup

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Compliance & Data Governance

Ensuring feedback collection adheres to GDPR, CCPA, and internal data privacy policies regarding customer communications.

Applicable Data Privacy Regulations

- ☐ GDPR
- ☐ CCPA
- ☐ HIPAA
- ☐ LGPD
- ☐ Other

Data Retention Period (Months)

- ☐ 3 Months
- ☐ 6 Months
- ☐ 12 Months
- ☐ 24 Months
- ☐ Indefinite

Data Controller Identification

Write something...

Data Processing Impact Assessment Summary

Write something...

Privacy Policy/Consent Documentation

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Compliance Officer Approval

Continuous Improvement & Audit

Periodic review of survey effectiveness, response rates, and the impact of feedback on product/service iterations.

Last Audit Date

Enter date...

Audit Frequency

- ☐ Monthly
- ☐ Quarterly
- ☐ Bi-Annually
- ☐ Annually

Areas Audited

- ☐ Survey Response Rates
- ☐ Data Accuracy
- ☐ Trigger Automation Reliability
- ☐ Closing the Loop Efficiency

Identified Areas for Improvement

Write something...

Next Scheduled Review Date

Write something...

Auditor Approval

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👍 Finish

🔧 Generate Sample Report