

Investment Firm Integrates Salesforce Into Qualtrics for Better Reporting

Synced Salesforce data within Qualtrics platform

This investment firm had partnered with Walker for their first Qualtrics integration before coming back with the need for a Salesforce integration. The team at Walker pulled in data from Salesforce to be shown in the Qualtrics dashboard, making it easier and more efficient for them to report results.

Established survey build and ticketing processes

The firm and Walker discussed the best way to design quarterly relationship distributions to maximize the usefulness of their dashboard and reduce the workload involved in adding a new data source. The team is closing the loop by triggering a transactional survey via Salesforce and sending ticket information back to Salesforce once closed.

Educated team on Qualtrics platform and capabilities

Learning about and understanding the Qualtrics platform became a big focus for the firm. The team has become very proficient in Qualtrics and now takes on most of the maintenance and build work themselves. They like to stay up to date on the newest features, and a strong professional relationship with Walker gives them the confidence to ask questions and build upon their own skills.

RESULTS

improved
survey result insights

trained
Cetera team in survey and
dashboard builds

improved
breakdown of data