

Service Cloud Persona Survey

Survey Questions

Which of the following responsibilities are part of your role? Please select all that apply.

1. Provide direct customer support through email, chat, phone, social, or other means
 - a. Several times per day or more (20 points)
 - b. About once per day (17 points)
 - c. Several times per week (15 points)
 - d. Several times per month (3 points)
 - e. A few times per year (2 points)
2. Solve customer support issues that are escalated to me by other service agents
 - a. Several times per day or more (20 points)
 - b. About once per day (17 points)
 - c. Several times per week (15 points)
 - d. Several times per month (3 points)
 - e. A few times per year (2 points)
3. Provide supervision/management of service center agents (e.g., scheduling, coaching, performance management)
 - a. Several times per day or more (20 points)
 - b. About once per day (17 points)
 - c. Several times per week (15 points)
 - d. Several times per month (3 points)
 - e. A few times per year (2 points)
4. Administer and maintain Salesforce
 - a. Several times per day or more (20 points)
 - b. About once per day (17 points)
 - c. Several times per week (15 points)
 - d. Several times per month (3 points)
 - e. A few times per year (2 points)
5. Create or update articles for the Knowledge Base
 - a. Several times per day or more (20 points)
 - b. About once per day (17 points)
 - c. Several times per week (15 points)
 - d. Several times per month (3 points)
 - e. A few times per year (2 points)
6. Create reports
 - a. Several times per day or more (20 points)
 - b. About once per day (17 points)
 - c. Several times per week (15 points)
 - d. Several times per month (3 points)
 - e. A few times per year (2 points)
7. Other: please list

How to Analyze the Survey

How to Score

1. Average the points for the tasks listed under each persona below.
2. Assign the persona to a participant based on which category has the highest number of points.

Personas

Case Solver

- Provide direct customer support through email, chat, phone, social, or other means

Expert Agent

- Solve customer support issues that are escalated to me by other service agents
- Create or update articles for the Knowledge Base

Team Leader

- Provide supervision/management of service center agents (e.g., scheduling, coaching, performance management)

Service Admin

- Administer and maintain Salesforce
- Create reports