

Survey Invite Channels

Overview

Alchemer Survey Invite Channels gives you the power to reach people through the channels that work best for them. Send survey invites, reminders, and personalized messages via SMS, WhatsApp, Facebook Messenger, email, and more, all from within Alchemer.

And it goes beyond just reaching people. With Alchemer, you can deliver composed, personalized messages directly into the business systems your teams already use, like Salesforce, Zendesk, and Slack, so feedback flows where it can make the most impact.

How It Works

Survey Invite Channels is built around two capabilities:

Compose: Alchemer lets you build dynamic, personalized messages using merge codes that pull in live data from your surveys and workflows. Write a message once and it is automatically personalized for every recipient.

Deliver: Alchemer can send messages through a wide range of channels, including email, SMS, WhatsApp, Facebook Messenger, and most connected integrations. Alchemer provides native sending for email and SMS, so no additional setup is required for those channels. For other channels, you can connect your own provider account, giving you greater flexibility and control over how messages are sent.

Available Channels

Sent directly by Alchemer

- Email
- SMS

Sent using your own provider account

- Email
- SMS
- WhatsApp
- Facebook Messenger

Delivered into connected business systems

Any message you compose in Alchemer can also be delivered directly into connected platforms like Salesforce, Zendesk, Slack, and more. See the full list of supported integrations below.

Common Use Cases

Boost survey response rates with the right channel

Send survey invitations and reminders through the channels where your customers are most responsive. SMS, WhatsApp, and Facebook Messenger offer high open rates and feel natural to recipients. With Alchemer, you can automate multi-channel sequences that follow up with respondents automatically.

Close the loop inside your support platform

After a support ticket is resolved, Alchemer can automatically add a personalized message to the Zendesk ticket inviting the customer to share their feedback. Your support agents see it too, keeping everyone informed without any additional steps.

Put feedback data where your sales team can act on it

When a prospect completes a survey, Alchemer can compose a personalized summary of their responses and add it directly as a note on their Salesforce record, giving your sales rep the context they need before their next conversation, without leaving their CRM.

Orchestrate campaigns across multiple channels

Use your existing provider account to run a survey campaign across email, SMS, and WhatsApp, all composed and triggered from a single Alchemer workflow, with every message personalized using merge codes.

Integration-Based Delivery

One of the most powerful aspects of Survey Invite Channels is the ability to deliver composed messages directly into the business systems your teams already work in every day.

Because Alchemer messages are built with merge codes and live survey or workflow data, they can be routed to any connected system that accepts text. Your feedback data flows into the context where it is most actionable, whether that is a CRM record, a support ticket, or a team chat channel.

For sales and revenue teams: Salesforce, HubSpot, Microsoft Dynamics 365, Zoho CRM, SugarCRM

For customer support teams: Zendesk, ServiceNow, Gladly, Gorgias, Kustomer

For internal teams: Slack, Microsoft Teams, Asana, Microsoft Office 365

Supported Integrations

CRM & Sales

Integration	Message Delivery Example
Salesforce	Add a note to a lead, contact, opportunity, or account
HubSpot	Add a note to a contact, deal, or company record
Microsoft Dynamics 365	Update a contact or opportunity with survey data
Zoho CRM	Post a note or update to a contact or deal
SugarCRM	Add a note or activity to a contact or account

Customer Support & Service

Integration	Message Delivery Example
Zendesk	Add a comment to a ticket (visible to agent or customer)
ServiceNow	Post an update to an incident, request, or case
Gladly	Add a conversation note to a customer record
Gorgias	Add a note or message to a support ticket
Kustomer	Post a note to a customer conversation

Internal Communication & Collaboration

Integration	Message Delivery Example
Slack	Send a composed message to a channel or user
Microsoft Teams	Post a message to a channel or chat
Asana	Add a comment or task note based on survey results
Microsoft Office 365	Send a message or update via Office 365

Extensible / Custom

Integration	Message Delivery Example
Twilio	Send SMS or WhatsApp messages using your own Twilio account
Custom Webhooks	Deliver composed messages to any system that accepts a webhook

