



MIGRATION EVALUATION FRAMEWORK

9 Critical Features to Validate Before You Switch from **Delighted**

Field-tested checklist built from real Delighted migration from 2025–2026

About This Framework

Built from Real Migration Experience

Every question, criterion, and capability listed here emerged from teams who migrated off Delighted in 2025–2026.

It's designed to help you skip the common pitfalls and focus on the features that actually matter when your team is using the new platform every day.

How to Use It

Each section gives you a structured way to evaluate a vendor:

- 1 **Validation questions** to ask vendors during demos and discovery calls.
- 2 **Common implementation patterns** to watch for as red flags.
- 3 **Expected capabilities** based on real migration outcomes.

Clear answers indicate vendor readiness and product maturity.

9 Categories That Decide Your Migration

01 **Survey design**
Brand control, logic, languages

02 **Multi-channel distribution**
Email, SMS, WhatsApp, in-app, offline

03 **AI feedback analysis**
Themes, sentiment, impact scoring

04 **CRM integration depth**
Bidirectional, event-triggered, mapped

05 **Closed-loop automation**
Tickets, alerts, escalation, tracking

06 **Compliance & security**
HIPAA, SOC 2, ISO 27001, GDPR

07 **Advanced analytics**
Multi-filter, role-based, exports

08 **Migration support**
Historical data, surveys, integrations

09 **Pricing transparency**
No hidden fees, contract credits

01

Survey Design & Customization

Build surveys that match your brand and needs.

REQUIRED CAPABILITIES

- ✓ Custom branding — logos, colors, fonts match your brand.
- ✓ Question logic & conditional branching (show Q3 only if Q2 = Yes).
- ✓ Multilingual surveys with automatic translation.
- ✓ Full question type library — NPS, CSAT, CES, Likert, matrix, open-ended, multi-choice.
- ✓ White-label capability (remove vendor branding entirely).
- ✓ Survey templates you can customize — don't start from scratch.

ASK THE VENDOR

- › Can I replicate my current Delighted survey design exactly?
- › Do I need a developer to add conditional logic, or is it drag-and-drop?
- › How many languages are supported natively? Auto-detect user language?
- › Can I remove all vendor branding for client-facing surveys?

WATCH FOR

- Branding limited to logo only
- Conditional logic requires custom code or developer
- Only 5–10 languages supported
- White-labeling locked behind enterprise tier
- Template library is just 3-4 basic examples

WHAT TO LOOK FOR

- Full brand control over colors, fonts, logos
- Drag-and-drop logic builder
- 40+ languages with auto-translation
- White-label included in growth tier
- 50+ pre-built templates you can customize

02

Multi-Channel Distribution

Reach customers where they are.

REQUIRED CAPABILITIES

- ✓ Email surveys (table stakes).
- ✓ SMS with two-way reply capability — not just link-based.
- ✓ WhatsApp surveys — critical for international customers.
- ✓ In-app and in-product widgets.
- ✓ Offline mode — iPad / Android kiosks for retail and field teams.
- ✓ QR codes for print materials and physical locations.

ASK THE VENDOR

- › Show me a two-way SMS survey. What if someone replies with text instead of clicking?
- › If my iPad loses internet mid-survey at an event, what happens to responses?
- › Can I trigger the same survey across email AND in-app based on user behavior?

WATCH FOR

- SMS discontinued or marked 'coming soon'
- Offline mode requires constant internet check-ins
- Each channel needs a separate survey setup with no unified distribution

WHAT TO LOOK FOR

- One survey, multiple channels
- Customer behavior chooses the channel — mobile users get in-app, email lists get email
- All responses consolidate into one dashboard

03

AI-Powered Feedback Analysis

Turn comments into actionable themes.

REQUIRED CAPABILITIES

- ✓ Automatic sentiment detection — positive, negative, neutral.
- ✓ Thematic grouping — clusters similar comments without manual tagging.
- ✓ Emotion detection — frustration, urgency, satisfaction.
- ✓ Impact scoring — which themes correlate with NPS changes.
- ✓ Natural-language queries — "What are detractors saying about pricing?"

ASK THE VENDOR

- › Show me your AI grouping 500 comments into themes. How long does it take?
- › Do I need to train the model on my industry terminology, or does it work immediately?
- › Can I query feedback in plain English and get answers with supporting quotes?

WATCH FOR

- AI requires a 'training period' or custom setup
- Sentiment-only with no thematic grouping
- Manual tagging still required for meaningful insights

WHAT TO LOOK FOR

- Upload 500 comments
- AI returns 5–7 themes in under 60 seconds
- Click a theme, see all related comments
- Filter themes by promoter/passive/detractor to find what drives scores

04

CRM Integration Depth

Bidirectional sync that actually works.

REQUIRED CAPABILITIES

- ✓ Survey responses write back to CRM contact records.
- ✓ NPS / CSAT scores update CRM custom fields automatically.
- ✓ Surveys trigger from CRM workflow events — not just time-based.
- ✓ Contact lists sync automatically — no manual CSV uploads.
- ✓ Churned customers removed from survey lists within 24 hours.

ASK THE VENDOR

- › Walk me through a Salesforce case closure triggering a CSAT — does the response write back to the case?
- › If a customer churns in HubSpot today, when do they stop receiving surveys?
- › Can I map custom CRM fields like 'Account Tier' or 'Renewal Date' to your system?

WATCH FOR

- One-way sync only — responses push to CRM, but CRM can't trigger surveys
- Manual CSV uploads required to keep contact lists current
- Custom fields don't map, so segmentation is lost

WHAT TO LOOK FOR

- CRM event triggers survey → response captured → score writes back to CRM record
- Customer data stays in sync without manual exports
- Custom fields map 1:1

05

Closed-Loop Automation & Workflows

Turn feedback into action automatically.

REQUIRED CAPABILITIES

- ✓ Detractor responses auto-route to assigned team members.
- ✓ Automatic ticket creation in Zendesk / Intercom / Freshdesk.
- ✓ Slack and Teams alerts when scores drop below threshold.
- ✓ Task assignment with due dates for follow-up.
- ✓ Case status tracking — open, in-progress, closed.

ASK THE VENDOR

- › Show me what happens when a detractor (NPS 0–6) submits a response. Who gets notified, and how?
- › Can I create a Zendesk ticket automatically and assign it to the account owner?
- › If someone doesn't follow up within 48 hours, can I escalate the case?

WATCH FOR

- Automation limited to email notifications
- No ticket creation capability
- Follow-up tracked in spreadsheets outside the platform
- Routing rules too basic to combine region + score + customer tier

WHAT TO LOOK FOR

- Detractor submits feedback → Zendesk ticket auto-created → assigned to account owner → Slack alert sent → manager sees case in dashboard → follow-up logged in platform

06

Compliance & Data Security

Non-negotiable for regulated industries.

REQUIRED CAPABILITIES

- ✓ HIPAA compliant with BAA included (healthcare).
- ✓ ISO 27001 certification (information security).
- ✓ GDPR compliance for EU customers.
- ✓ SOC 2 Type II — enterprise requirement.
- ✓ Data residency options — US, EU, APAC.

ASK THE VENDOR

- › Is your BAA included in the contract or charged extra?
- › Where is customer data stored? Can I choose my data region?
- › Show me your SOC 2 report. When was it last audited?
- › How do you handle GDPR right-to-erasure requests?

WATCH FOR

- HIPAA marked 'in progress' or 'on roadmap'
- Single data-center location with no regional choice
- Audit logs not available — and they're required for compliance reporting

WHAT TO LOOK FOR

- ISO 27001 certified
- HIPAA compliant with BAA included
- Data stored in your chosen region (US/EU/APAC)
- Full audit trails for compliance reporting

07

Advanced Analytics & Segmentation

Multi-dimensional insights, not just basic filters.

REQUIRED CAPABILITIES

- ✓ Filter by multiple criteria simultaneously — not one at a time.
- ✓ Custom dashboards per role, team, or location.
- ✓ Scheduled reports with automated delivery.
- ✓ Export to CSV, Excel, PDF.
- ✓ Location-level rollups — compare performance across branches.
- ✓ Cohort analysis — track how customer groups perform over time.

ASK THE VENDOR

- › Show me filtering for 'Enterprise customers in healthcare with NPS below 7 in Q4.' Can I save it as a segment?
- › Can regional managers see only their location's data while executives see consolidated views?
- › Can I export raw data with timestamps for analysis in Tableau or Power BI?

WATCH FOR

- Only one filter at a time — can't combine region + plan type + time period
- Dashboards identical for all users with no role-based views
- Export limited to 1,000 rows
- No way to save frequently-used segments

WHAT TO LOOK FOR

- Apply 3–5 filters simultaneously
- Save as custom segment
- Each team sees relevant data without manual filtering
- Unlimited exports for BI tools

08

Migration Support & Data Continuity

Preserve your historical NPS trends.

REQUIRED CAPABILITIES

- ✓ Historical responses import with original timestamps intact.
- ✓ NPS trend line continues without gaps.
- ✓ Contact lists migrate with all custom properties.
- ✓ Survey templates replicated — not rebuilt from scratch.
- ✓ Integration settings transferred — API keys, webhook URLs.

ASK THE VENDOR

- › Will my Jan–May 2026 Delighted data import dated correctly so my YoY trend line is accurate?
- › Do you replicate my existing surveys, or do I rebuild them manually?
- › How long does migration take for 10,000 contacts and 50,000 historical responses?
- › Is migration support included, or does it cost extra?

WATCH FOR

- Migration is 'self-service' — you do all the work
- Historical data imports without timestamps, breaking trend lines
- Survey replication needs screenshots and manual rebuild
- Timeline quoted as '4–6 weeks'

WHAT TO LOOK FOR

- Free white-glove migration
- Historical data imported with original dates
- Surveys replicated exactly
- Integration credentials transferred securely
- Live in 24-48 hours for simple setups

09

Pricing Transparency & Contract Flexibility

No surprises, no hidden fees.

REQUIRED CAPABILITIES

- ✓ Ballpark pricing or quotation examples provided upfront.
- ✓ Overage charges clearly defined for response-limit breaches.
- ✓ Migration support included — not a separate professional-services line.
- ✓ Integration connectors included — not per-integration fees.
- ✓ Remaining Delighted contract credited toward new platform.

ASK THE VENDOR

- › Total cost for 5 users, 10,000 responses/month, and the core features we need?
- › Are there usage caps? What happens if I exceed my response limit?
- › If I have 4 months left on Delighted, will you credit that toward my subscription?
- › What's included in the base price vs. add-on features?

WATCH FOR

- Heavy integration fees for enterprise CRMs (Salesforce, Microsoft Dynamics) charged separately
- Migration quoted as a professional-services fee
- No contract buyout or credit for Delighted users

WHAT TO LOOK FOR

- Core integrations included in base plan
- Enterprise integrations (Salesforce, Dynamics) clearly disclosed upfront if extra
- Free migration support
- Delighted contract months credited to new subscription

SCORING

Migration Decision Matrix

Score each vendor across the 9 categories to make the right decision for your need.

FEATURE CATEGORY	MUST-HAVE	BONUS	NOT CRITICAL
1. Survey design & customization	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2. Multi-channel distribution	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3. AI feedback analysis	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4. CRM integration depth	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5. Closed-loop automation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6. Compliance & security	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7. Advanced analytics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
8. Migration support	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
9. Pricing transparency	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

HOW TO SCORE

Must-have Critical features for this category. Disqualifying if missing.

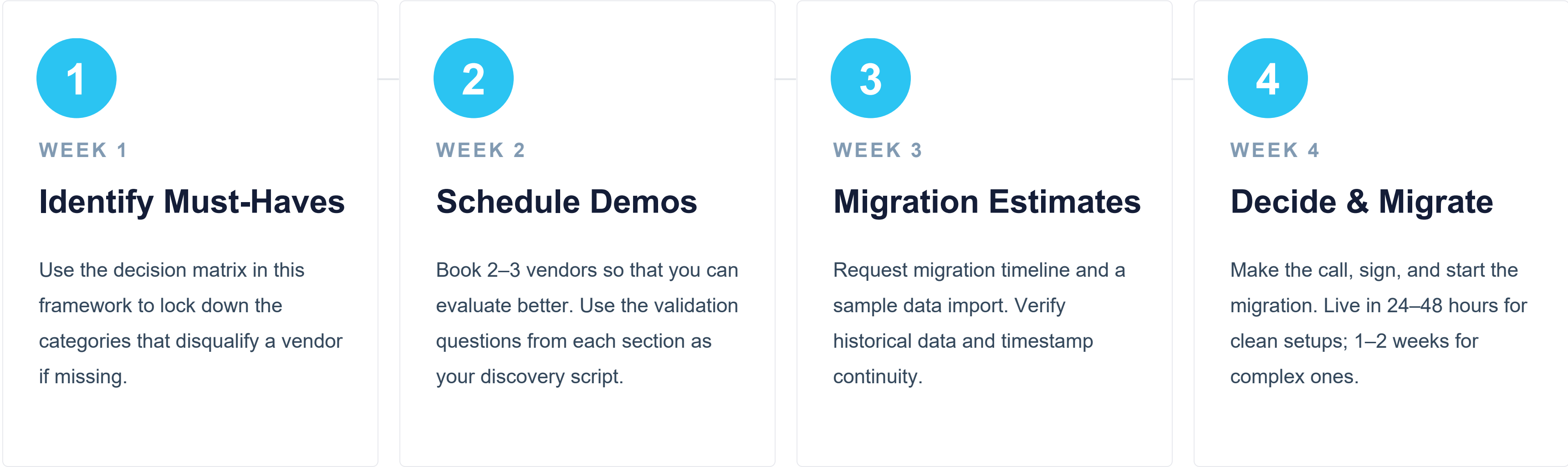
Bonus Valuable additions. Tie-breakers when vendors match on must-haves.

Not critical Evaluate only if multiple vendors tie on everything else.

EXECUTION

4 Week Migration Timeline

Your path from evaluation to go-live before Delighted shuts down



TIMELINE MATTERS Delighted shuts down June 30, 2026. Late-May or June starts leave no room for testing or unexpected delays.



Ready to See How **Zonka Feedback** Handles Migration?

Schedule a demo to walk through your current Delighted setup, review data-import options, and get a personalized migration timeline.

[Schedule a Demo](#)