Creating a Phone Survey

A Step-by-Step Worksheet Guide

This guide is intended to help you prepare your questions and messages before you begin to assemble a survey. It contains spaces for you to write scripts as well as directions to help walk you through the steps of creating your survey.

There are five basic steps to creating a survey:

1. Plan your messages and questions.
2. Record your messages and questions.
3. Build a Survey Template.
4. Test your survey.
5. Schedule your Survey Job.

Step 1: Plan your messages and questions.

Your survey should have an introductory message, a few questions, and a conclusion, or good-bye message.

Introductory Message: This message is the greeting participants will hear when they answer their phone.

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Questions: Keep in mind that although the questions are labeled numerically, you may want to randomize the order the participants receive them in later on. Also you may select up to nine possible responses, although you can have as few as two. There will be spaces for additional questions to follow. Your questions and possible responses should be simple, clear, and easy to follow. Users can press the star key to repeat a question, but you will need to tell them that in your question.

For example:
"On a scale of one to nine, with nine being the best, how would you rate your survey experience? To repeat this question, press the star key."
"From the following options, what color do you prefer? Press one for red. Press two for yellow. Press three for blue. To repeat this question, press the star key."

Question 1

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Question 2

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Question 3

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Question 4

Question 5

Good-bye Message: This is the message that the participant will hear when they have finished answering all of your questions.

Answering Machine: This is an optional message that participants will receive if their answering machine answers the phone. *Note: If you leave a message on an answering machine, the system will not attempt to call the number again.*

Sample message: "Hello. This is a message from Anytown Elementary. Our system was attempting to reach you to participate in an automated phone survey regarding school uniforms. If you would like to participate please call the school office at (123) 456-7890 to request a survey form to be mailed to you."

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Now that you have finished planning your survey messages and questions, you are ready to move on to the next step.

Step 2: Record your messages and questions.

Messages and questions are recorded as individual phone messages, just like the messages for any job. For this guide, we will use Call Me to Record, but you may use whichever message recording method you prefer.
Note: If you require a multilingual survey, you will need to send separate surveys to each alternate language group.

1. Click the Notifications tab followed by the Messages sub tab.
2. Click the Call Me to Record button on the Message Builder page.
3. Enter a name for your new message and the direct access phone number where you can be reached.
4. Click Call Me to Record.
5. You will receive a call from the system momentarily.
6. Follow the prompts to record your message. To record more than one message, simply follow the prompts.
7. When you are done, your new messages will appear in the Call Me window where you can assign them names. To help you stay

organized, it's a good idea to consistently name your messages with a system such as survey name and survey part. For example, the introduction message for a survey called Parent Opinion might be like this: Parent Opinion-Intro. This will make assembling your survey template much easier later on.

8. Click Save when you are done to save your messages.

Once you have recorded all of your messages and assigned them names, you are ready to assemble your Survey Template.

Step 3: Build a Survey Template

The Survey Template is where you will pull all of your messages together to form the basic structure of your survey. For this guide, we will only be creating a telephone survey. If you would like to add an online component to your survey please refer to the online help for instructions.

Click the Notifications tab followed by the Messages sub tab.
Click the Create New Survey Template button in the My Survey Templates section to go to the Survey Template Editor.

The Survey Template Editor has several fields which you will need to fill out. Since we are creating a phone survey only, we will be primarily concerned with the Settings, Phone, and Questions sections of the page. Below is an explanation of the fields and what needs to be entered in them.

Settings

- **Name:** Enter the name of your Survey Template here.
- **Description:** Enter a description of the Survey Template here.
- **Randomize Question Order:** Click this checkbox to randomize the order of the questions for each recipient. This can help you gather a more complete picture of how people respond to your questions by more evenly spreading out responses. For example, if you created a non-randomized survey with three questions, but several people hung up after responding to the first two, the third question would have less responses and therefore less data to work with in establishing an average response. By randomizing the survey question order, you can avoid skewed results because early hang ups would not always occur on the same question. *Note: You can only use the randomize option if you did not indicate a question number when you recorded your questions.*

Phone

- **Phone Survey:** Check this box for your phone survey.
- **Leave message on answering machines:** Check this and select the message to be delivered to calls that are answered by machines. *Note: If you leave a message on an answering machine, the number will not be retried.*
- **Play introductory message:** Check this and select the introductory message for this survey. You may preview the message you selected by clicking the Play button next to the drop down menu.
- **Play goodbye message:** Check this and select a message that the recipient will hear after responding to the last question in your survey. You may preview the message you selected by clicking the Play button next to the drop down menu.

Questions

- **Report Label:** In this field, enter the name for the question as you would like it to appear in your job report. You may find it easier to use labels indicative of the question's topic.
- **Phone:** Select the phone message that contains the question from the drop down menu. You may click the Play button to preview your question and make sure it's the right one.
- **Response:** Select the response possibilities for your question from the drop down menu. For example, your question is, "From the following colors, please select which is your favorite. Press 1 for red. Press 2 for yellow. Press 3 for green. Press 4 for blue." You would select 1-4 in the Response drop down.
- **Actions:** Click the Add button to add another question to your survey. Click Delete to remove a question from your survey.

Once you have entered all of the information into your Survey Template, you are ready to proceed to testing your survey.

Step 4: Test your survey.

Before you send your survey to your final list of participants, it’s a good idea to test it on yourself. Listen closely to make sure that you have selected the correct recordings and that your messages and questions are clear and easy to understand.

This section will describe how to schedule a test of your survey job. You will need to create a list that contains only your information for testing purposes.

1. Click the Notifications tab followed by the Surveys sub tab.
2. Click the Schedule Survey button in the My Active and Pending Surveys section to access the Survey Scheduler.

The Survey Scheduler has a few fields that you will need to fill out.

- **Survey Name:** Enter a name for your Survey Job here.
- **Description:** Enter an optional description for your survey here.
- **Job Type:** Choose the job type you are sending.
- **Survey Template:** Select the Survey Template you created in the previous steps.
- **List:** Select the test list which contains only your contact information.
- **Start Date:** Enter the date you would like your Survey Job to being running on.
- **Number of days to run:** Select the number of days you would like your job to run.
- **Survey Time Window:** Select the earliest and latest times you would like the system to contact recipients with your survey.
- **Email a report after when the survey completes:** Checking this box will have the system email a report to the email address associated with your account when the job has finished running.
- **Maximum attempts:** Choose the number of times you would like the system to try to call before giving up.
- **Caller ID:** Enter the phone number as you would like it to appear in the caller ID.

When you are finished entering the information into the Survey Scheduler fields, click the Proceed to Confirmation button at the top or bottom of the screen to review and confirm your selections and send the job.

If you complete testing your survey and find that everything sounds great, you are ready to proceed to the next step. If there are any problems, you may go back and edit any part of your Survey Template or messages. If you make any changes, you should test your survey again before sending it.

Step 5: Schedule your Survey Job.

When you have successfully tested your survey, you are ready to send it out to your list of participants. Just follow the steps from Step 4, but instead of using your test list, use your final list of participants. If you need more information on how to create a list, please refer to the online help.