Creating a Web 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. Create an Email Message invitation.
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.

Email Message: This is the email participants will receive inviting them to take your survey. The system will automatically create a link to your survey at the bottom of your email. You should make sure to tell participants to click the link at the bottom of the email.

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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. Make sure to define the numeric values of the responses.
> **For example:**
> "From the following options, what color do you prefer? Select 1 for red, 2 for blue, or 3 for green."

Question 1

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Question 2

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Question 3

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Question 4

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Question 5

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Web Thank You Message: This is the message that the participant will see when they have finished answering all of your questions.

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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: Create an Email Message invitation.

Create your Email Message just like you would for any notification job.
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 Create New Email Message button on the Message Builder page.
3. Enter a name for your new message.
4. Fill out the Email Message Builder form. If you need additional information, please see the online help.
5. Click Save when you are done to save your messages.

Once you have created your Email Message, you are ready to assemble your Survey Template.

Step 3: Build a Survey Template

The Survey Template is where you will form the basic structure of your survey. For this guide, we will only be creating a web survey. If you would like to add a phone 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 gave 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. *Note: You can only use the randomize option if you did not indicate a question number when you created your questions.*

Web

- **Web Survey:** Check this box for your phone survey.
- **Email Message:** Select the email message you created to invite participants to your survey.
- **Web Page Title:** Enter the title for your survey's web page.
- **Web thank you message:** Type a thank you message that participants will see when they complete your survey.
- **Use HTML in Web Survey:** Click this is you would like to use HTML in your survey questions or messages.

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.
- **Web:** Type your question. Make sure to define the possible responses.
- **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. Select 1 for red, 2 for blue, or 3 for green." You would select 1-3 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. Look closely to make sure that you have entered everything correctly 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 type of job 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 looks 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.