



# Creating a Survey Guide

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## Introduction

This guide is intended to help you prepare your questions and messages before you begin to assemble a survey in Communicate. 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 four basic steps to creating a survey:

- Plan your messages and questions.
- Build a Survey Template.
- Test your survey.
- Schedule your survey.

## Plan Your Messages and Questions

There are two possible types of surveys, phone and web (email). Your survey can have one or the other, or both if you like.

In general, a phone survey may have a recorded introductory message, an answering machine message, and a good-bye message.

In general, a web (email) survey may have a **Web Page Title**, **Web Thank You**, and an **Email Message**.

### Introductory Message (Phone)

This message is the greeting participants will hear first when they answer their phone.

#### Examples

*Hello, this is SCHOOL DISTRICT. We are calling to ask that you participate in a brief automated survey regarding school uniforms. To participate in the survey, please stay on the line.*

*Hello, this is MR. SMITH, Principal at ANY MIDDLE SCHOOL. I am calling to ask that you participate in a brief, automated, 10 question survey to gather information that may be used to improve the quality of our school. If you prefer to take the survey electronically and we have a valid email address for you, a link has been sent via email allowing you to respond online. To participate via phone, please stay on the line.*

### Answering Machine Message (Phone)

This is an optional message that participants will receive if their answering machine answers the phone.

 **Note:** If you elect to leave a message on an answering machine, the system will not attempt to call the number again.

#### Example

*Hello. This is a message from SCHOOL DISTRICT. We are 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.*

## Web Page Title (Web/Email)

This is the title of the survey, which will show up in large text on the web form of the survey. This field has a limit of 50 characters.

### Example

*School District Uniform Survey*

## Email Message (Web/Email)

This is the message you will use to allow recipients to participate electronically. They will receive it via email.

 **Note:** Your message does not need to contain a link to your survey, as Communicate will automatically generate one and append it to the end of the email. You should, however, direct participants to click the link at the bottom of the email.

### Examples

*Dear Parents,*

*This is a message from SCHOOL DISTRICT inviting you to participate in our online survey about school uniforms. It should only take about two minutes to complete.*

*Your opinion matters to us and we would greatly appreciate your participation. Please click the link below to proceed to our survey.*

*Thank you,*

*MR. SMITH*

*Principal*

*Dear Parents,*

*I am writing to ask that you participate in a brief TEN question survey so that we can gather information that may be used to improve the quality of our school.*

*Your opinion matters to us and we would greatly appreciate your participation. Please click the link below to proceed to our survey. The link will be active through Sunday evening.*

*Thank you,*

*MRS. SMITH*

*ANY SCHOOL Principal*

## Goodbye Message (Phone) / Web Thank You Message (Web/Email)

This is the message that the participant will hear when they have finished answering all of your questions if it is a phone survey, or what they will see at the end if it is a web (email) survey.

 **Note:** If you are going to allow replies when creating the survey, be sure to mention in your Goodbye Message or Web Thank You Message that this is available by pressing the zero key.

### Examples

*Thank you for participating in this survey. Your responses have been noted and your feedback is appreciated. Goodbye.*

## 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.

While you may have as many questions as you like, you may only select **up to nine possible responses**, although you can have as few as two. There will be spaces for additional questions in the section to follow.

Your questions and possible responses should be **simple, clear, and easy to follow**.

For phone surveys, users can press the star key (asterisk) to repeat a question, but you will need to tell them that in the introductory message and/or question itself so that they are aware of this.

### Examples

*[The introductory message plays, then...] To repeat any question if you'd like to hear it again, press the star key at any time during or after the question.*

*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.*

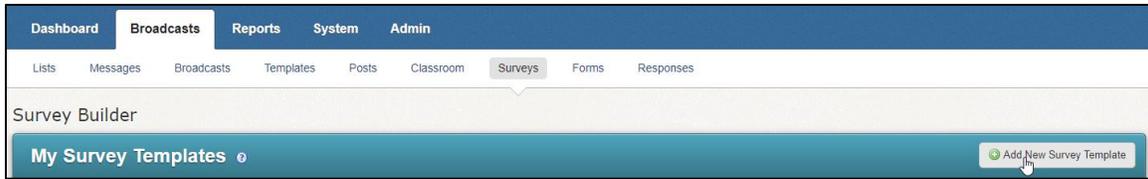
## Record Your Messages and Questions

The messages and questions mentioned earlier are created and compiled in a **Survey Template** before being scheduled to be sent to participants. The **Survey Template Editor** will guide you through the process of building your survey. You will be able to use the **Call Me to Record** feature for your phone questions.

**Guide** help is available throughout the Survey Template Editor to explain each step. If you use the Guide, a description of each step will appear, but in case you need the steps directly, they are below.

 **Note:** If you require a multilingual survey, you will need to send separate surveys to each alternate language group.

Click the **Broadcasts** tab, then click the **Surveys**.



Click **Add New Survey Template**.

Fill in the following information:

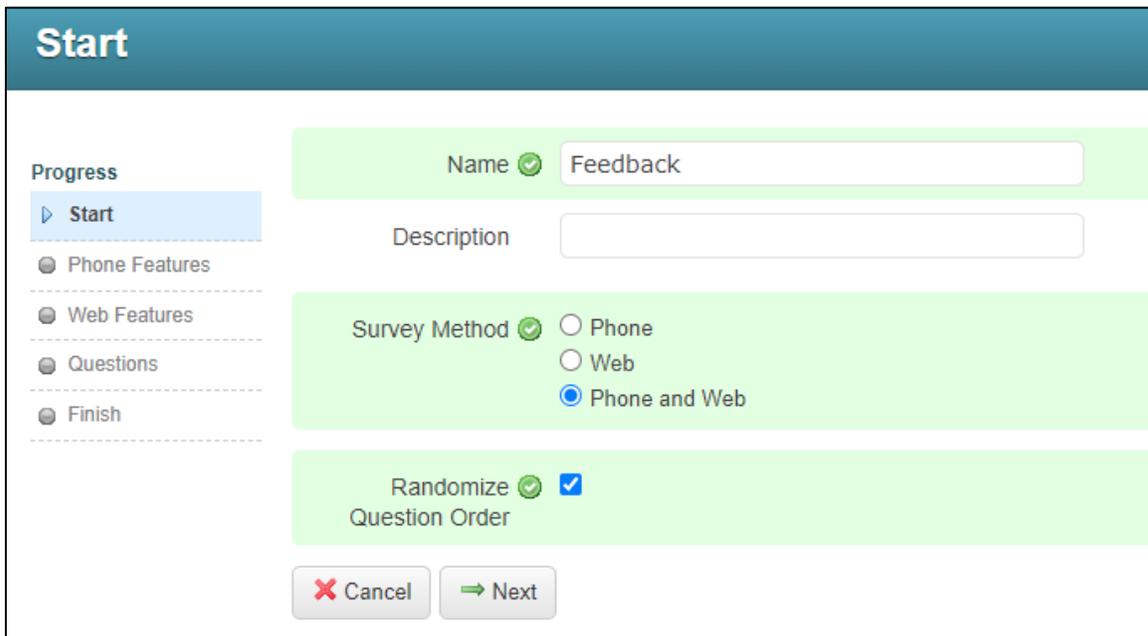
**Name:** Enter the name of your Survey Template here.

**Description:** Optionally, enter a description of the Survey Template here.

**Survey Method:** Select whether your survey will be sent by **Phone**, **Web** or both **Phone and Web**.

**Randomize Question Order:** Click this checkbox to randomize the order of the questions for each recipient. By randomizing the survey question order, early hang ups will not always occur on the same question, avoiding skewed results and helping you gather a more complete picture of responses.

 **Note:** You should only use the randomize option if you do not indicate a question order when you record your questions. If you specified an order to the questions in the Introductory message, the questions will appear out of order to the participant.



After configuring your settings, click **Next**.

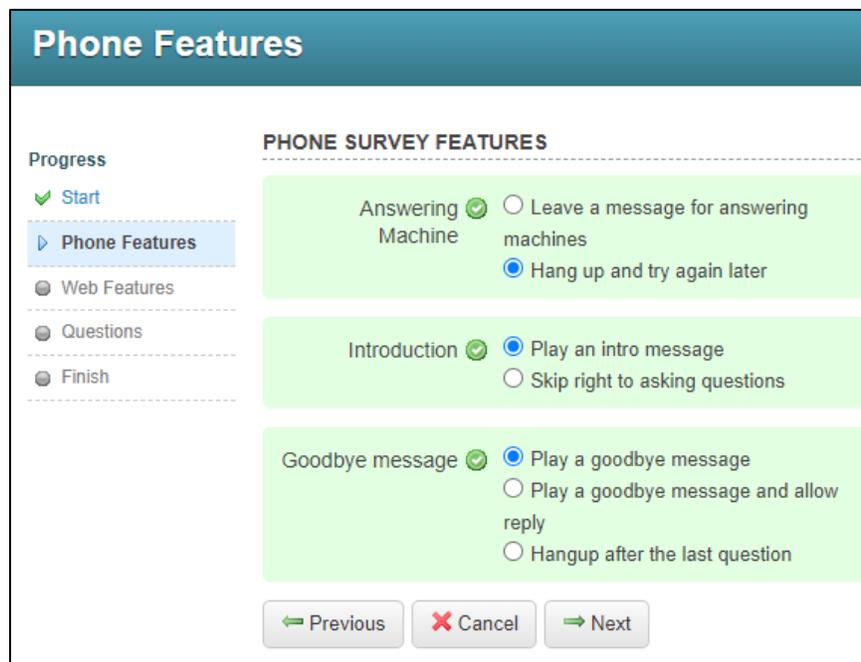
## Configuring Phone Settings

If you chose **Phone** or **Phone and Web** you will be directed to the **Phone Features** section to configure the following:

**Answering Machine:** With this choice, you can choose to **Leave a message for answering machines** or **Hang up and try again later**. If you choose to leave a message for answering machines, then the number will not be attempted to be contacted again, it will simply leave a message.

**Introduction:** With this choice, you can choose to **Play an intro message**, or **Skip right to asking questions**.

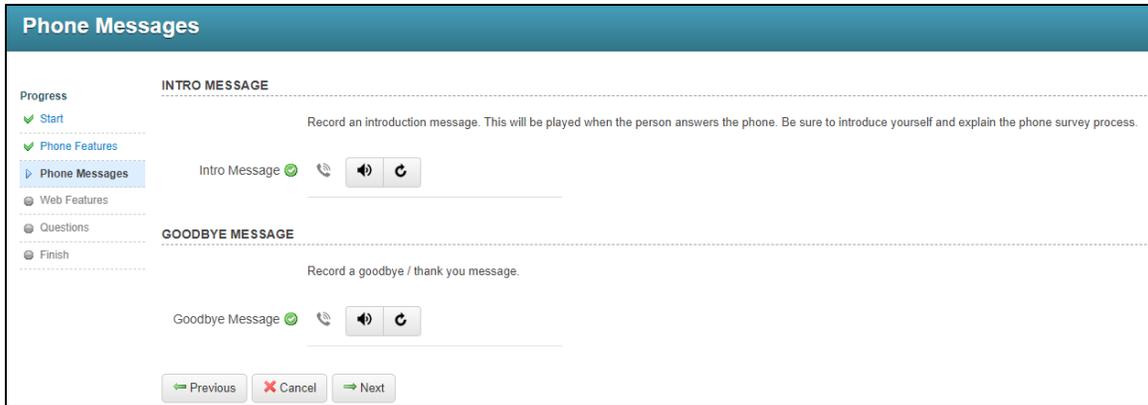
**Goodbye Message:** With this choice, you can choose to **Play a goodbye message**, **To play a goodbye message and allow reply**, or **Hang up after the last question**. If you choose **Play a goodbye message and allow reply**, be sure to include that the participant needs to press the zero key to reply in your recorded goodbye message.



Click **Next**.

If you chose to **Play an intro message** or one of the **Play a goodbye message** options, you will be directed to the **Phone Messages** section to record your messages.

For each of the **Intro Message** or **Goodbye Message** fields, fill in your phone number and click **Call Now to Record**.



After recording your message(s), click **Next**.

## Configuring Web Settings

If you chose **Web** or **Phone and Web**, you will be prompted to configure your web settings.

**Web Page Title:** Enter a title for the survey's web page in the field.

**Web Thank You Message:** Type a thank you message into the field. This is the message participants will see when they have completed your survey.

**Use HTML in Web Survey:** Click the checkbox for if you would like to use HTML code in your questions or messages, including the Web Thank You Message.

**Email Link** is the section where you will enter your email message. This is what the participant will see in the initial email that contains the link to your survey (the link is added automatically, no need to put it here).

 **Note:** *In the fields below that require email addresses, it must be a valid, approved domain. You can use the system default of [broadcasts@schoolmessengermail.com](mailto:broadcasts@schoolmessengermail.com) if you don't have one in mind.*

**From Name:** Enter the name that you want the email to show it is from.

**From Email:** Enter the email address that you want the email to be from.

**Reply to Email:** Enter the email address that you want to populate when they click "reply".

**Subject:** Enter the subject of the email, perhaps the title of the survey for instance.

**Email Message:** The actual body of the email.

**EMAIL LINK**

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From Name  SchoolMessenger

From Email  broadcasts@schoolmessengermail.com

Reply To Email  cdanner@ourexampledistrict.edu

Subject  Web Survey for Andor School District

Email Message  This is a web survey from Andor School District.  
  
 Your responses are important to us. To participate in the survey please follow the link below or copy and paste the link into your web browser.  
  
 Thank you,  
 Andor School District

← Previous
✖ Cancel
Next →

When finished, click **Next** to proceed to the setup of the questions.

## Adding Questions

After setting up your phone and/or web settings, you will be prompted to set up the questions for your survey.

For each question, fill out the following information:

**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.

**Valid Response:** Choose the range of options that will be offered to respondents. This ranges from **1-2** up to **1-9**. This allows you to decide the range of answers or ratings you want to provide the client.

**For Phone Surveys:** If you have chosen to include the **Phone** option, enter your phone number and click **Call Me to Record** to record the question for the respondent. Be sure to include information on the range of ratings the respondent can choose. For example: Please enter a number between 1 and 5 where 1 means strongly disagree and 5 means strongly agree.

**For Web Surveys:** If you have chosen to include the **Web** option, enter the **Web Question Text** for the question. Be sure to include information on the range of ratings the respondent can choose. For example: Please enter a number between 1 and 5 where 1 means strongly disagree and 5 means strongly agree.

**QUESTION 1**

Report Label  School Site Usability?

Valid Response  1-5

Phone Question    

Web Question Text  On a scale of 1 to 5, how would you rate our website on ease of use. If you find it very difficult to use, choose 1. If you find it very easy to use, choose 5.

Tools

Add Question

After setting up your question, repeat this process by clicking **Add Another Question button** to add another question to your survey. Continue adding questions until you have added all the questions you wish to include in your survey.

If you decide you wish to remove a question from your survey, click **Remove Question** button for the given question.

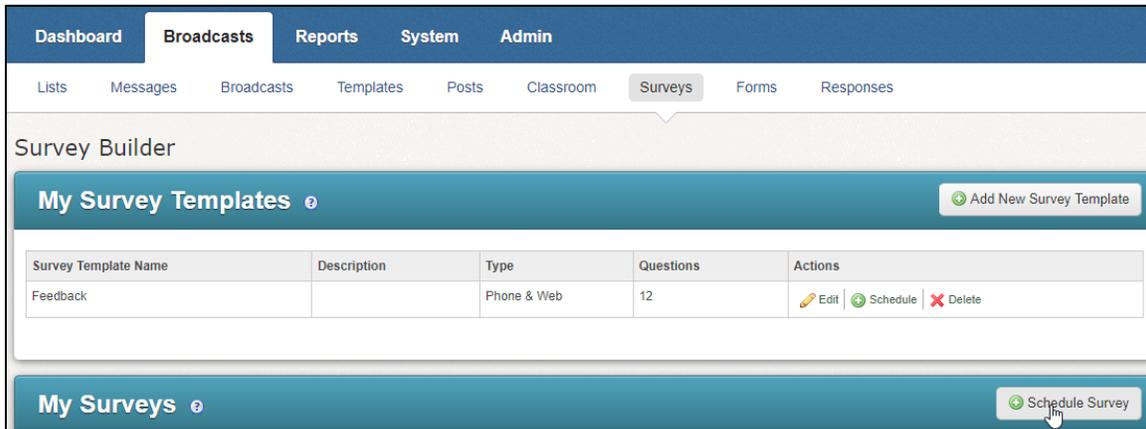
Once you have entered all of your questions, click **Next** and then click **Done**.

## Testing your Survey

Before you send your survey to your final list of participants, it is a good idea to test it on yourself. Listen closely to make sure 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 have created a list that contains **only your information** for these testing purposes.

Click the **Broadcasts** tab, then click the **Surveys** sub-tab.



Click **Schedule Survey** in the **My Surveys** section.

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

**Note:** You may notice that this is similar to a manual broadcast or a repeating broadcast, but there are some important differences, all described below.

**Survey Name:** The name of your survey.

**Description:** An optional description for your survey.

**Type/Category:** Broadcast Type that you would like to use for your survey. Be sure to select one that has the proper **Phone** and **Email** fields for your survey. For example, a Broadcast Type that only has email fields selected should not be used for a phone survey.

**Start Date:** The date that you would like your survey to begin running on.

**Days to Run:** Number of days that the survey notification will run if it does not finish sending in one day. This is commonly set to 1, but for exceptionally large contact lists, it can be increased if needed.

**Start Time and End Time:** The earliest and latest times of the day(s) (selected in **Days to Run**) that the survey notification will be sent.

**List(s):** The list(s) of contacts that the survey will be sent to. You will need at least one saved list for this step. For testing purposes to send to only yourself, make sure to select the list that has only you selected.

**Template:** Survey Template that you wish to send.

**Auto Report:** When checked, this will send a report to the email address on your user account when the survey notification is completed.

**Max Attempts:** The number of times the system will attempt to send the survey before giving up.

**Personal Caller ID:** Enter a specific phone number if you want something besides the default Caller ID number to appear in the participants' caller ID. This field is optional; based on account settings, you may or may not see this.

### LIST(S)

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Lists ✔  Testing List  
 District Guardians

List Name	Count
Testing List	1
<b>Total</b>	<b>1</b>

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### TEMPLATE

Template ✔ Feedback ▼

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### ADVANCED OPTIONS

Auto Report ✔

Personal Caller ID ✔ (888) 742-7702

Max Attempts ✔ 4 ▼

✔ Save
➔ Proceed To Confirmation
✖ Cancel

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

If you complete testing your survey by sending to yourself, and you find that everything looks and/or sounds great, you are ready to proceed to the next step, which is scheduling your survey to be sent out to participants. 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 then test your survey again by sending just to yourself.

## Scheduling your Survey

When you have successfully tested your survey and are happy with the results, you are ready to send it out to your list of participants. Just follow the steps from *Testing your Survey*, but instead of using your test list, use a List that contains your actual participants. If you need more information on how to create a list, please refer to the online help.

## Questions?

If you have any questions regarding the above, please contact support.

## SchoolMessenger Solutions Support

**Phone:** 800-920-3897

**Email:** [support@schoolmessenger.com](mailto:support@schoolmessenger.com)