Creating A Survey Worksheet & Guide

A Step-by-Step Worksheet Guide

This guide is intended to help you prepare your messages and questions before you begin to assemble a survey. It contains space for you to write scripts as well as step-by-step directions to walk you through creating your survey.

There are four basic steps to creating a survey:

1. Plan your messages and questions.
2. Create your survey template.
3. Test your survey.
4. Schedule your Survey Job.
Step 1: Plan your messages and questions.

Your survey will be made up of a handful of components; these include:

- **Phone Survey Options** (If you plan to allow recipients to respond via phone)
  - Answering Machine Message (optional)
  - Introduction Message
  - Good-bye Message
- **Web Survey Options** (If you plan to allow recipients to respond electronically)
  - Webpage Title
  - Web Thank You
  - Email Message (If you plan to allow recipients to respond electronically)
- **Questions**

**Phone Survey Options**

**Answering Machine Message**

If a survey call reaches an answering machine, it can either leave a message letting the person know why they received a call, or hang up and try again later. If you elect to leave a message on an answering machine, the system will not attempt to call the number again. If you elect to NOT use this option, the system will continue to call the number until the number of phone attempts has expired.

**Sample:** “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 the district has a valid email address for you, you have been sent a link to participate in the survey electronically. The electronic survey is open to responses through Sunday evening.”
Use the space below to draft your optional Answering Machine Message.

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Introduction Message

It is a best practice to record an introduction message describing the survey process before asking questions. People are more likely to participate in the survey if they know what it is about and why their response is important.

The following are samples of introduction messages; the greeting participants will hear when they answer their phone. The second sample includes instructions on using the optional Web survey.

**Sample:** “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.”

**Sample:** “Hello, this is MR. SMITH, Principal at ANY MIDDLE SCHOOL. I am calling to ask that you participate in a brief, automated, 5 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.”

Use the space below to draft your Introduction Message.

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Good-bye Message

It is a best practice to record a goodbye message thanking the person for their time. People will be more likely to answer future surveys when they know their feedback is appreciated. The Good-Bye Message is the message that participants will hear when they have finished answering all of your questions.

Reply messages are an optional feature that can be used to collect additional information from the person that is not otherwise covered in the survey questions or to provide feedback about the survey. These messages will show up in the Responses tab.

Note: If you allow replies, be sure to mention in your Good-bye Message that this is available by pressing the zero key.

Sample: “Thank you for participating in this survey. Your responses have been noted and your feedback is appreciated. Good-bye.”

Sample: “Thank you for participating in this survey. Your responses have been noted and your feedback is appreciated. If you would like to record any additional comments, please press zero. Good-bye.”

Use the space below to draft your Good-bye Message.

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Web Survey Options

Webpage Title

When creating a web survey it is a good idea to create a title page, this will show up in large text on the web survey form.
Web Thank You

Entering a Good-bye Message thanking the person for their time and responses is highly recommended. People are more likely to participate in future surveys if they have been thanked for their time.

Email Message

This is the message you will use to allow recipients to participate electronically. Be sure to introduce yourself and give some information about the survey and why their response is important.

Note: A link to the survey will be appended to the end of this message. You should direct participants to click the link at the bottom of the email. It is also a good idea to inform recipients how long the survey will be open.

Sample: Dear Parents,

This is a message from ANY SCHOOL 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. The link will be active through Sunday evening.

Thank you,

MR. SMITH
Principal

Sample: Dear Parents,

I am writing to ask that you participate in a brief 5 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
Use the space below to draft your Email Message.

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Questions

Keep in mind that although the questions are labeled numerically in this document, you may want to randomize the order in which the survey participants receive them. Also, you may select up to nine possible responses, although you can have as few as two. Your questions and possible responses should be simple, clear, and easy to follow. Users can press the star key to repeat a question, remind them of that function after each question.

Sample: “On a scale of one to five, with five being the best, and one being the worst - how would you rate your survey experience? To repeat this question, press the star key.”

Sample: “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.”

Use the space below to draft your Questions. Questions are not limited to those spaces listed.

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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Now that you have finished planning your survey messages and questions, you are ready to move on to the next step.
**Step 2: Create your survey template.**

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.

**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 Surveys sub tab.

2. Click the Create New Survey Template button.

3. Follow the Guide help in the page to complete your survey. To turn on Guide help, simply click the Guide button on the right side of your screen. By clicking the arrows it will move you through each step of the process. Be sure that you are available for the system to call you to record the phone messages.
Step 3: 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 your messages and questions are clear and easy to understand.

1. 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. Click the Notifications tab followed by the Surveys sub tab.

2. Click the Schedule Survey button in the My Surveys section to access the Survey Scheduler.

The Survey Scheduler fields you need to complete:

- **Survey Name:** Enter a name for your Survey Job here.
- **Description:** Enter an optional description for your survey here.
- **Job Type:** Choose “Survey”.
- **Survey Template:** Select the Survey Template you created in the previous steps.
- **List:** Select your Test List which contains only your contact information.
- **Start Date:** Enter the date you would like your Survey Job to begin running.
- **Number of days to run:** Select the number of days you would like your job to run. If you select 1 day, the link to participate electronically will expire at midnight of the Start Date. If you select 2, the link is active until midnight of the day after the Start Date.
- **Survey Time Window:** Select the earliest and latest times you would like the system to contact recipients.
- **Email a report 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 attempt 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 4: 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 3, 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.

![Survey Scheduler](image-url)