

Getting Started with Your First Survey





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About this Manual

Once your Constant Contact account is established, this manual will guide you through an overview to creating a survey. Although Constant Contact has many features, this manual discusses **creating a survey**.

The Navigation Tabs

Upon logging in to your Constant Contact account, you will see the navigation tabs along the top of the page. These tabs include the:

- Home tab
- Emails tab
- Surveys tab
- Contacts Tab
- Images tab
- My Settings tab

Note

This manual only discusses the **Surveys** tab.

The Surveys Tab

The Surveys tab is where you will create and manage your surveys and polls. Here you can create new surveys and polls, check the status, and quickly view how many responses have been received.

Survey Name and Template

With ListenUp!sm Survey, you'll make better decisions because you'll have feedback from more of your customers – instead of just the most vocal ones. You'll get ideas for new products and services – along with a deeper understanding of what it takes to satisfy and keep your valued customers.

Creating surveys is easy. The survey creation wizard will guide you through the following steps:

1. Name the survey
2. Select a survey template (provide a business reason for the survey and Constant Contact will suggest survey templates for you)
3. Customize the layout of the survey with your logo and fonts and colors for the background, title and questions
4. Create a greeting page
5. Create a closing page
6. Set your survey status to Live and distribute the link

The My Surveys Page

In order to create surveys, you must be on the **My Surveys page** of your Constant Contact account. Access your **My Surveys** page by:

1. Clicking the **Surveys** tab from the navigation bar
2. Clicking the **Create New Survey** link under the tabs on the navigation bar

Surveys: Name & Title

In this screen, you will name your survey, and select how you want to create it.

- The **Survey Name** is how you will identify your survey within your Constant Contact account – it is not seen by your recipients

You may elect to create your survey using a template that will help you get started, based on the type of survey you are creating. You may also elect to start without the aid of a template, by starting with a blank survey.

To give your survey a name:

1. Type a survey name in the **Survey Name** text field

Select a Template

Like email templates, survey templates offer a basic structure to work from when you are creating your surveys.

Survey templates include text blocks with relevant text to help you get started quickly. In many cases, you will only have to change a few words within each question – customizing it for your particular needs.

If you want to browse all templates, make the selection to start with a template and click the **Next** button to continue. If you want to start with a blank survey and add all of your own questions, make the selection and click the **Next** button to continue.

If you need help getting started, click the link in the highlighted box. The new screen will allow you to choose a business reason for the survey, such as learning about your audience. When you select a reason and click “Find Templates” you will be shown a list of suggested templates. If none of the suggested templates appeal to you, you can go back and choose a different business reason, you can browse the most popular templates, or you can click the link to browse all templates.

Select a survey template by following these steps:

1. Choose a **Survey Template Category** by clicking one of the category links
2. Choose a survey template by clicking in the radio button next to the template name
3. Click the **Next** button to continue

General Layout

Once you set your survey name and choose a template, you are ready to create your survey.

This section describes the general layout of the *Survey Layout* page.

Getting Help

No matter where you are within your survey, you can quickly get help the way you need it:

- Click the **Get Help** link in the upper right-hand corner to open the *Resource Center*
- Click the question-mark icon (?) for context-specific help
- Click the more information icon (i) to open a topic-specific help window
- Click the tutorial icon to view (?) an interactive tutorial on a specific feature

The Exit, Save and Save & Continue Buttons

The **Exit** button will allow you exit from creating your survey. If you choose this button, you will be prompted to save

your work first.

Both the **Save** and **Save & Continue** buttons allow you to save your work.

The **Save** button will save your work and allow you to continue working on the survey, or to exit using the **Exit** button described above.

The **Save & Continue** button will save your work, and will take you to the next step in creating your survey.

Add/Edit Skip Logic link

The **Add/Edit Skip Logic** link will allow you to apply Skip Logic to your survey. It is important to note that applying Skip Logic should not be done until after you have entered and formatted all of your questions. Once Skip Logic is applied to your survey, you will have limited editing ability; being limited to editing question text and answer option text only.


The Preview and Spellcheck Buttons

- The **Preview** button allows you to take your survey without actually changing the status to “live”, and without skewing your data. Previewing your survey is a good way to gauge the order of the questions, the flow of skip logic, and so on.
- The **Spellcheck** button lets you check for spelling errors on your survey.

The Properties and Global Colors and Fonts Links

Located under the **Preview** and **Spellcheck** buttons are two links: **Properties** and **Global Colors & Fonts**.

The *Properties* section allows you to turn question-numbering on or off. If you have used skip logic in your survey, numbering will be automatically turned off. This is a requirement for skip logic.

You can also format the question separator bar () by making a selection from the drop-down box. You may leave the default, choose a 1 pixel thin line, or choose no line at all.

The *Global Colors & Fonts* link lets you customize your survey to match your own look and feel. You may change the background color of the survey as well as the font style, size and color for the survey title, questions and answer options text.

Survey Header and Title

The survey header will display at the top of each page on your survey. If you have designated an organization logo in the “My Settings” tab, that logo will automatically display here. You can change the logo if you like, or delete it by using the **Change image** or **Delete image** links above the logo. Deleting the logo here will only delete it from this survey, and not from your account.

The title text of the survey will default to the name of your organization and the word “Survey.” You can change the text by clicking the **Edit title** link, making your change, and clicking **Save**.

Questions and Layout

You may wish to add additional questions in your survey; adding questions is accomplished by clicking the **Question** button next to the words “Add here.”

Inserting **Text** allows you to enter a block of text that can serve as additional instructions or clarification for the page, question type, and so on.

Page breaks limit the number of questions a respondent can see on each page of your survey by creating a new page. To add a page break, click the **Page Break** button above the question block where you'd like the break to appear.

Question Types

Question types are available in the following question formats:

- Single-Select, Multiple Choice
- Multi-Select, Multiple Choice
- Open-Ended Text
- Rate Items on a Scale
- Rate One Item on a Scale
- Rank Items Numerically
- Collect Personal Information

When choosing question types, consider what type of information you need (one answer, many answers, open-ended, ratings, or personal information). If you've already written your survey questions and answers, you may want to rephrase them into a more appropriate question format.

Inserting Questions


Insert additional questions by following the steps below:

1. Click the **Question** button followed by the words Add here
2. Choose the question type by clicking the question-type link
3. Type your questions and answers (if applicable)
4. Click the **Save** button

Editing Questions

Editing questions is a way for you to edit the question and possible responses, as well as change the question from one type to another.

To edit a question, follow these steps:

1. Click the **Edit** icon () for the question you wish to edit
2. Highlight the text in the *Question Text* text field
3. Type new text in the *Question Text* text field
4. Select the *Number of answer options* drop-down box* and select the number of possible responses
5. Highlight the responses in the *Answers* to be selected text fields*
6. Type new text in the *Answers* to be selected text fields
7. Click the **Add an image** link, if you wish to add a graphical image next to the response*
8. Click the **Save** button

Note

*Depends on question type...not all questions types will have this option.


Inserting Images

Some question types allow you to include images next to your answer options. This is especially helpful for

questions where describing an answer might not be clear.

For example, if a dance teacher wanted to find out which costume is the most popular among respondents, a picture will allow the respondents to quickly and accurately make their decision.


To insert an image:

1. Click the **Edit** icon () for the question you wish to add the image to
2. Click the **Add an image** link below the answer option
3. Select an image from the image library or reference an image URL
4. Resize the image if necessary
5. Click the **Insert Image** button insert the image

Changing Question Type

When you choose a question type, you have the option to later go back and change the question type, without losing your previously-entered text.

To change the question type:

1. Click the **Edit** icon () for the question you wish to edit
2. Click the **Change Question Type** link at the top of the box
3. Select the new question type by clicking the question-type link – or – to keep the question type as-is, click the **Continue editing / No change** link
4. Click the **Save** button to save changes to question and close the question type box

Single-Select, Multiple Choice

The Single-Select, Multiple Choice question type allows you to create an “either/or” question – meaning, your respondents can only select one option from your list of possible responses.

“Yes/No” questions are an example of the Single-Select, Multiple Choice question type.

This question type gives you the following additional options:

- *Include “Other” as a possible answer, so respondents can enter their own text.* Clicking this check box will include an option called “Other”, with a text field where respondents can enter their comments.
- *Allow respondents to add a comment.* Checking this check box adds a text field where respondents can add additional comments.
- *This question is required for the respondent.* Clicking this option makes this question required in order for the respondent to continue with the survey. Required questions are annotated by a red asterisk next to the question.

Multi-Select, Multiple Choice

The Multi-Select, Multiple Choice question type allows you to create a question where respondents can select one or more options from your list of possible answers.

This question type gives you the following additional options:

- *Include “Other” as a possible answer.*
- *Allow respondents to add a comment.*

- *This question is required for the respondent.*

Open-Ended Text

The Open-Ended Text question type allows you to create a question where no answer options are provided and respondents can enter their own text for the answer.

- *Answers are limited to:*

One line of text with 50 characters

Seven lines of text with 350 characters

Ten lines of text with 500 characters

This question type gives you the following additional option:

- *This question is required for the respondent.*

Rate Items on a Scale

The Rate Items on a Scale question type allows you to create a question where respondents can rate items based on a scale you create.

For example, if you use the question: *How do we rate on the following attributes?* You could define the attributes, then define a scale from *Well Below Average* to *Well Above Average* and respondents could rate each attribute.

This question type gives you the following additional options:

- *Allow respondents to add a comment.*
- *This question is required for the respondent.*

Rate One Item on a Scale

Similar to the *Rate Items on a Scale* question type, the Rate One Item on a Scale allows you to create a question where respondents can rate one item based on a scale you create.

For example, if you use the question: *How likely are you to use our services in the future?* You could define the scale from *Least Likely* to *Most Definitely* and respondents could make the appropriate choice.

This question type gives you the following additional options:

- *Allow respondents to add a comment.*
- *This question is required for the respondent.*

Rank Items Numerically

The *Rank Items Numerically* question type allows you to create a question where respondents can rank from 2-10 items on a numeric scale.

For example, if you use the question: *Please rank the following resorts in your order of preference.* You could then define the Ranking scale so that *1= Least*, and respondents could rank the resorts according to their preference.

This question type gives you the following additional options:

- *Allow respondents to add a comment.*
- *This question is required for the respondent.*

Collect Personal Information

This question type allows you to gather information about respondents, and is limited to one occurrence per survey. You can use this information for later follow-up, or to mail out rewards for survey participation. This question type is also a great way to help build and maintain your contact list. If you choose to make the results data available for importing into your contacts, the following text will be included on the survey:

"By entering my personal information, I consent to receive email communications from the survey author's organization based on the information collected."

If you choose to make the question required, then you may not declare that you will import the contact information to your account, as it is not recommended to require survey respondents to join your contact list. If the question is marked required, the respondent will need to complete all of the fields you selected, in order to submit the survey.

You may choose the following fields to include in this question type:

First Name	Address 1
Middle Name	Address 2
Last Name	Address 3
Job Title	City
Company Name	State/Province
Work Phone	Postal Code
Home Phone	Country

See page 13 for information about importing the results for this question into your contacts.

Greeting Page

Create a Greeting Page

This is where you can choose whether or not to include a greeting page. If included, the greeting page is the first page that respondents will see when they take your survey. If you plan on placing the survey link on your website, you may want to create a greeting page explaining what the survey is about.

If you wish to include a greeting page you will have the option of adding an image and using the same background color and font selections used in your survey. You may also edit or replace the text in the text field. If a logo displays when you choose the option to include a greeting page, it is the image that you set as your organization logo in the "My Settings" tab. You can change the image, or delete it by using the links above the image.

Closing Page

Create a Closing Page, include view Survey Results link

You have the choice of directing respondents who complete your survey to a URL of your choice, such as a page on your web site, or creating a custom page thanking respondents for their participation.

If you wish to include a closing page you will have the option of adding an image and using the same background color and font selections used in your survey. As with the greeting page, you may change or delete the image from

the closing page. You may also edit or replace the text in the text field.

You can choose to include a link to survey results on the closing page by clicking in the check box. When you click in the check box, an additional field displays where the text for the link can be edited.

Please note that survey results can be delayed up to one hour. When a respondent completes a survey and clicks the link to view survey results, their own answers will not be included in the results shown.

Survey Status

Going Live and Distributing Your Survey

Once you have successfully created your survey, you will have three options:

You can...

- Make your survey live and create an invitation email to distribute the link

When you distribute the survey link using a Constant Contact invitation email, you will be able to view detailed results including respondent email addresses and other details.

- Make your survey live, but do not create an invitation email

The link can be placed on your web site or delivered by email; however, no respondent details will be available. Results will show respondents who access the survey via this link, as anonymous.

- Keep the survey in draft status

You can choose to keep the survey in draft status. All of the elements of the survey can be modified when it is in draft status. You may make your survey live at any time.

Create an Invitation Email

You can choose to create an invitation email when making your survey live or you can click the link on the Survey Details page.


To create your invitation email:

1. Enter a name for your invitation email. This is for your use and will not be seen by your respondents.
2. Click **Next**.
3. Enter Email Message Settings such as the Subject Line, From Name, From Email Address and Reply Email Address.
4. Click **Next**.
5. Edit and format the layout of your invitation email; including logo, organization name, introduction and closing.

Hint

Use the *Add Blocks* and *Global Colors & Fonts* links to customize the layout of your invitation email.

6. Preview the invitation and send a test to yourself (optional).
 - Click the **Preview** button.
 - Enter up to five email addresses in the "Email Addresses" field.
 - Add a personal note if you like, letting the recipient know that this is a test email and any survey results will not be saved.
 - Click **Send**.

7. Click **Save and Continue**.
8. Choose the list(s) you would like to send the survey invitation to. Contacts that exist in more than one list will only receive one email.
9. Click **Next**.
10. Select a status for your email invitation.
 - Choose Draft if you are not ready to send or schedule the invitation at this time.
 - Choose Send Now if you are ready to send the email invitation now.
 - Click the calendar icon () if you wish to schedule the invitation to be sent on a specific date.
11. Click **Finish**.

The Invitation Results page will display. At any time, you can check the progress of your invitation from this page. You can also review the progress of your invitation from this page.

Survey Details

Survey Status

This is where you can set the status of your draft survey to Live or choose to Close a Live survey. When a survey is closed, it will no longer be able to be taken. To close a live survey, click the button labeled **Close Survey**. You can also schedule your survey to close automatically by clicking the *close automatically when...* link in this screen and setting the conditions for the close. You have the option of having the survey close when a defined number of responses has been received or on a specific date. If you choose both options, your survey will close when the first condition is met. You may edit the close conditions as often as necessary, or close the survey immediately by clicking the **Close Survey** button at any time.

Distribution

As long as your survey is in draft status, you will see the link **Test Survey**. When you select this link, you will see a URL link which can be sent to others to test the survey before making it live. When you send out this link for people to test the survey, they do not need to have access to your Constant Contact account in order for the link to work. Answer and response information is not saved during this testing process.

If your survey is in Live status, the URL link for the survey will be shown here. This link can be placed on a web site or distributed via email to collect feedback anonymously. Remember, when you distribute the link using email such as Microsoft Outlook or Yahoo! for example, the responses will show as anonymous in the Individual Results screen. The only way to view personal data about your respondents is to distribute the survey using a Constant Contact invitation email.

Resending an Invitation Email

You may want to send survey invitation reminder emails to those who have not yet taken your survey. To resend an invitation email:

1. Access the Survey Details page for the appropriate survey.
2. Click the Invitation Results link.
3. Click on the appropriate invitation name to access the summary page for this email.
4. Click the **Resend Options** button.
5. Select how you want to resend the email:

- Enter email addresses directly into your Constant Contact account
 - Send only to new contacts that have been added to the list since the original email was sent
 - Send to contacts who originally received the email invitation but have not yet responded to the survey
6. Click **Next**
 7. Depending on which resend option you selected, you will either enter email addresses into the field provided, or decide whether to send the email now, or schedule for a specific date and time.
 8. Click **Finish**

Note

If your survey is in Live status, *Invitation Results* will show how many invitations were sent for the survey and allows you to create additional invitation emails by clicking the *Create an Invitation Email* link.

Share Survey Results

This is where you can decide to share the results of your survey with respondents after they have completed it. A choice of **Yes** in this field will generate a URL link that can be placed on a web site or within the closing page of your survey. To include the link on the closing page, click the *closing page link* and check the box.

Note

Recently submitted results will be delayed up to one hour after the respondent completes the survey before they are included on this page.

Responses

In the responses section, you will see the breakdown of contacts and anonymous responses to your survey.

Responses will only be anonymous if the respondent accesses the survey via the link. Respondents who access the survey via the invitation email are not anonymous.

Edit Survey Properties

This section allows you to edit properties of the survey. For Questions/Layout, you have full editing ability if the survey is in Draft status, however, if your survey is Live, editing is limited to question text and answer option text.

You can use the links provided to *Create a Greeting Page, Edit Closing Page and Edit Survey Header Logo*.

You can edit the **Name** of your survey as well as the **Title** on this page.

You can also choose whether to allow multiple responses from the same computer.

If you choose not to allow multiple responses from the same computer, this would prevent the respondent from taking the survey over and over again from the same computer. If this is a one-time survey, you might want to select this option. But if this is a survey that you plan to send out each time someone makes a purchase from you, then you would not want to select this option.

If you choose to allow multiple responses from the same computer, this will allow a responded to take the survey over and over from the same computer. This is a good option if you were at an expo, and have your survey set up in a kiosk.

Reporting and Survey Results

It's easy to see the results for any survey.

In order to view the reports, locate the survey on the *My Surveys* tab and click on the name of the survey you wish to view results for. This will bring you to the *Survey Details* page.

Results links

As you can see there are three different types of reporting in Survey, the **Overall Results** which is a graphical report of all the Survey Data, **Individual Results** and **Invitation Results**.

The **Overall Results** screen shows the total number of responses and the response ratio for each question. These results can be exported to a Microsoft Excel file, a .pdf file, or a comma separated value (.csv) file. If you export to Excel or .pdf the resulting document will show each question with the total number of responses and the response ratio; the report will not show any comments or text answers from the survey. If you export to a .csv file, you will have the raw data including how each respondent answered the questions as well as any comments and text answers.

The **Individual Results** screen shows a list of respondents that includes email addresses for contacts that responded to the survey, as well as anonymous respondents that accessed the survey from a link on a web site, or in an external email client such as Microsoft Outlook. You may click the link *Survey Responses* to see how a specific respondent answered questions on the survey. You also have the option to delete survey responses in this screen, however, deleted responses will still count toward the total number of responses for your billing plan. The Individual Results can be exported to .csv format, which will include how each respondent answered questions, as well as any comments or text answers on the survey.

If you distributed your survey using an Invitation Email, the **Invitation Results** screen will show statistics about the email including:

- number sent
- bounces
- spam reports
- opens
- clicks
- forwards

Importing results from “Collect Personal Information” question type

To individually import results into your contact list, view the results in the **Individual Results** screen and click on the *Survey Responses* link. Choose the responses you want to add to your contact list by clicking the *Add to Contacts* link for that response. You will be prompted to select which list you would like to add the contact information to, or you can click the link to *create a new list*. In the next screen, you will be prompted to check off the items on the Permission Confirmation Checklist, indicating that you have permission to add the contact's information.

Click the *Activity* link to view the status of the imported file. When the screen shows the status as “Complete” you will be able to see the contact information in your contact list.

To import all of the results from this question into your contacts, view the results in the **Overall Results** screen and click either the *View the Answers*, or, *View Answers* link. In the next screen, click the *Add these responses to my contacts* link and select which list you would like to add the contact information to, or create a new list. Check off the items on the Permission Confirmation Checklist to begin the process.

Click the *Activity* link to view the status of the imported file. When the screen shows the status as “Complete” you will be able to see the contact information in your contact list.

Note

Contacts are identified by email address in Constant Contact. If a survey respondent updates their profile information, such as name and address, but leaves a field blank, such as the phone number, the blank field will not override existing information for that contact. In this scenario, the contact's name and address would be updated, but their phone number would stay intact.

Create a Poll

Create a Poll

To begin, click the link **Create Poll** on the *Surveys* tab.

1. In the field labeled *Poll Name*, type a name for your poll. This name is for your internal use and will not be seen by poll takers.
2. You can modify the body background color and the font style, size and color for your question and answer options by clicking in the *Fonts and Colors* section. Make modifications to the poll, so that the colors match the web page where the poll will be displayed.
3. Enter your poll question in the space provided.
4. Choose how many answer options you wish to include; 2-5, by clicking in the drop-down box.
5. Enter your answer options in the spaces provided.
6. Click **Update Preview** to see how the poll will look to voters.
7. Click **Save and Finish** if you are ready to make your poll live.

When you click **Save and Finish**, the Poll Details page will display. Here, you can test the poll by choosing an answer option and clicking **Vote**. You may test the poll again by clicking **Test Again**.

The percentages shown when testing the poll are simulated data to see how the results will look when viewers submit their vote, and will not be included in your actual poll result numbers when the poll is live.

8. Click **Save** if you wish to save your poll, but are not ready to go live.

Set the Poll Live

Access the *Poll Details* page and click **Go Live Now**.

You will see a confirmation message, letting you know that you have made the poll live.

You will also see the HTML code for the poll in the field labeled **Poll HTML**. You can copy and paste the code to a page in your web site so that visitors can begin voting.

A URL link for the poll is also provided in this screen, which can be inserted into an email, blog, or social networking site.

You may also edit the question and answer options from this page by clicking on the *Edit Questions/Answers link*. However, once the poll is live, you will not be able to add or delete answer options. You will only be able to edit the text when the poll is in *live* status.

Note

The maximum number of Live polls you may have in Constant Contact is ten.

View Poll Results

From the *My Surveys/Polls* page, click the name of the poll for which you wish to view results.

On the *Poll Details* page, you will be able to see how many responses there are for the poll.

Click the link labeled *Poll Results* to see the number of responses and percentage ratios for the answer options.

Note

Once a poll has received 10,000 responses, it will no longer accept votes. Visitors to your site will see the results of the poll, but will not be able to cast a vote.

Close a Poll

From the *My Surveys/Polls* page, click the name of the poll for which you wish to close.




On the *Poll Details* page, click the **Close Poll** button.

A closed poll will no longer accept votes from visitors to your web site. Visitors will see the results of the poll, but will not be able to vote. The poll will stay on your web page until you remove the HTML code.

If you delete a poll from your Constant Contact account without removing the code from your web page, only the *Constant Contact* poll banner will display on your site.

Getting Help

No matter where you are within your survey, you can quickly get help the way you need it:

- Click the **Get Help** link in the upper right-hand corner to open the *Resource Center*
- Click the question-mark icon () for context-specific help
- Click the more information icon () to open a topic-specific help window
- Click the tutorial icon to view () an interactive tutorial on a specific feature