

How Do I Create Customized Service Surveys In Email Marketing?

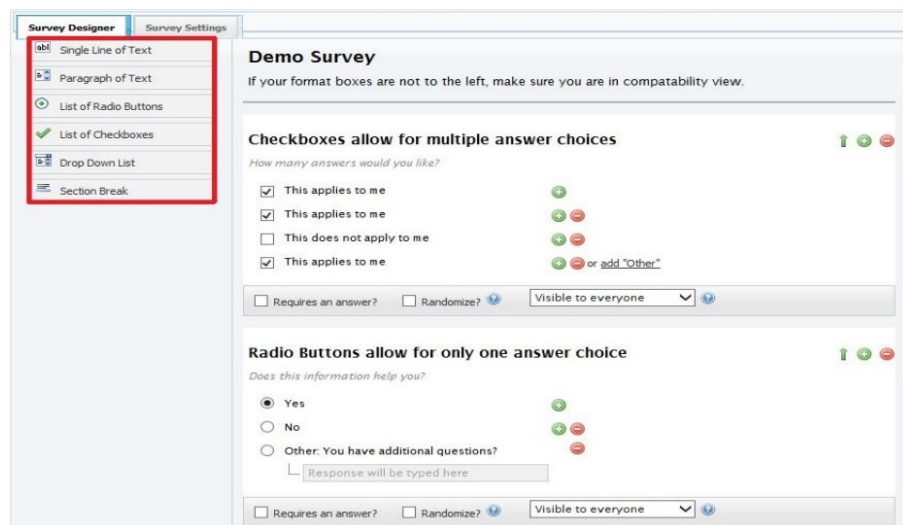
Last Modified on 11/02/2020 2:37 pm CST

Create a Survey

Surveys can be created and used in emails, autopilots, and/or websites to gather information and opinions from your customer base. It is most popularly used for post-service surveys to get customer feedback on their experience at the dealership. The best part is these surveys are completely customizable: it's completely up to you what questions to ask!

To create a survey, think about your target audience to identify questions you'd like to have answered.

1. Inside the Email Marketing system, click the Surveys tab, and then Create a Survey.
2. Click Untitled Survey to enter a title, then add some introductory text, if needed.
3. Now, select Question Formats from the Survey Designer editor by clicking and dragging the desired question type from the left to right. You can allow recipients to type in their unique responses, select from choice "radio buttons", and/or utilize check boxes or drop-down lists. Select the text boxes to fill in the text for your questions and answers. Use " + " and " - " to add and remove answer option.



4. Click "Save & Continue" or "Save & Exit" at the top-left of the page when you are completed. **Created surveys do not automatically save**, so be sure to save early, and save often.
5. You may want to change or view some of the settings particular to the survey you're creating. Click the Survey Settings tab.

Create a Survey

Drag fields from the left to right below to build your survey. You can add a link to your survey when creating an email campaign or autoresponder.

Survey Designer **Survey Settings**

Display & Feedback Options

* Header Text or Logo: Display text at the top of the survey:
 Display my logo at the top of the survey:

* When the Survey is Completed: Display this text as the thank you page:
 Take them to a particular web page:

* Email Survey Responses? Yes, send responses to this email address:

Advanced Options

* Error Message:

* Submit Button Text:

6. Survey Settings allows you to edit some important things, but be aware if you check the box which says “Yes, send responses to this email address”, you’ll need to enter an email address. Only choose this option if you want an email every time someone completes a survey. If you are expecting a large number of responses, you might not want to check this option.

All the survey results and responses are stored within the Email Marketing program, so you can always check for responses periodically.

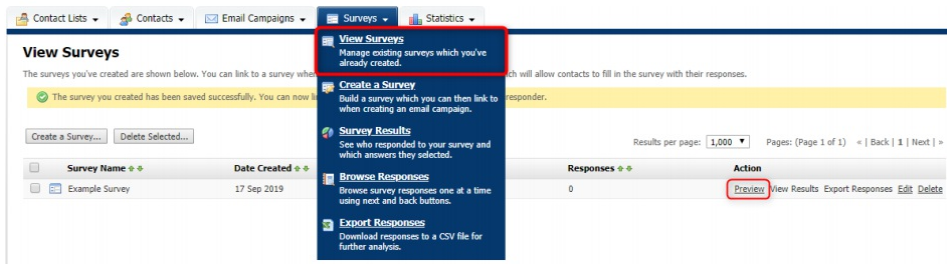
7. If you have changed any of the Survey Settings, make sure you save your survey again.

View Surveys

We recommend previewing a survey before having your customers use it. There are also other options available. Click Surveys, and then View Surveys.

From the View Surveys screen, you can:

- Create a survey
- Delete a survey, if you no longer need it
- Preview a survey, as a customer would see it
- View Results of a survey
- Export Responses of a survey in an Excel format
- Edit a survey, to change the questions and/or answers, or update the survey settings



If you Preview a survey, you will be taken to your survey as the customer sees it. You can even fill in responses, and submit the results. At the top of the page, in your web browser's address bar, you'll see the survey address. Use this URL to link to your survey, such as on your website or within an email.

View Survey Responses

If you click on View Results from the View Surveys page, you will be able to view a tally of all survey responses. You will also have the option to Export Responses or Browse Responses One-by-One.

If you click on "Browse Responses One-by-One"

- You'll be able to Edit Responses by each individual answer
- You'll also be able to Delete Responses in their entirety, if someone submitted irrelevant or incomplete answers which you don't want to be included in the overall results

If you click on "Export Responses", you will be able to download the responses into an Excel file. You can also Export Responses from the View Surveys page.
