

A Step-by-Step Guide to Survey Success



Table of Contents

Why VerticalResponse?	3
Quickstart Guide	4
Step 1: Setup Your Account	4
Step 2: Create Your Survey	6
Step 3. Access Your Dashboard and Reports	12

Why VerticalResponse?

If you're looking to grow your business by marketing to your customers, but you're short on time and resources, VerticalResponse is the perfect solution. At VerticalResponse we strive to make small businesses look like giants (and who doesn't want their business to be giant?).

Small businesses today increasingly rely on the ease and affordability of tools like those VerticalResponse provides. In just a few minutes you can easily create professional looking e-newsletters, direct mail postcards, and online surveys to engage your customers, learn more about them, and increase sales. You've got a few minutes to increase your sales don't you?

Simply put, we are an online (Software-as-a-Service) provider that allows anyone, regardless of technical experience, to create and send emails, surveys, and postcards from any web browser.

As a company, we pride ourselves on being experts in marketing and the products we build, sell and support. This guide is one of many ways that we practice what we preach.

Why Surveys?

In a perfect world, you'd know exactly what your customers want and could serve it right up to them without hesitation. Unfortunately, things don't quite work this way, so you've got to use the tools you have available to find out more about your customers. And there's no better tool for this purpose than a survey.

A well-written and formatted survey will generate high response rates and provide you with quality information to help improve just about any aspect of your business.

Use Surveys:

- ✓ *To ask customers about your products or service.*
- ✓ *To manage an event or ask people about their experiences at the same.*
- ✓ *To gather market research.*

Quickstart Guide

There is a lot of great, detailed information to be found throughout this guidebook. But what if you need to get a Survey out right now and don't have time to read through everything first? Just follow the 8 easy steps below:

Open Your Free VerticalResponse Account – If you don't already have an account, you'll need one before you can do anything else. Sign-up from our homepage at <http://www.verticalresponse.com/guidebook> and your account will be ready to go in a few minutes.

Start Building Your Survey – You'll find a New Survey link on both the Home and Survey sections of your account. Click this link and you'll be on your way.

Choose Your Survey Settings – Select whether you want to build your survey from scratch or using one of our 18 pre-made templates, whether you want to run a traditional or blindfold survey and whether you just want to invite people to the survey via VerticalResponse email or also place a link to the survey on your website (or anywhere else).

Step 1: Setup Your Account

Before you reap all the benefits that VerticalResponse has to offer you must first create an account from our website. Creating an account is easy to do:

1. Visit our website at <http://www.verticalresponse.com/guidebook>.
2. Fill out the form that can be found on the right side of this page.
3. Activate your account by clicking on the activation link in the confirmation you receive after submitting the sign-up form.
4. You're done! You can now go back to www.verticalresponse.com and log into your account.
5. At no point in this process do we ask for your credit card or payment information – that's because the account itself is free. All the steps described in this guide (aside from actually receiving live responses to your survey), can be performed without any payment. We'll take a look at how pricing works a bit further down in this section.

Now that you have an account, go ahead and take a few minutes to look over all the different tools that are available to you. These tools are sorted into a number of sections listed across the top of every part of the account. You'll need to use two of these sections in order to create a survey and invite people to fill it out:

Surveys – The Surveys section is where you build your survey and examine the reporting you get back after you get responses to your questions.

Lists – The Lists section is where you upload, manage and build the lists that you'll use to invite people to take your survey. Note that sending an invite through VerticalResponse is optional and not a required part of the survey creation process.

This guide will examine both these sections in detail.

How Does Pricing Work?

Survey pricing is based on monthly subscriptions. There are four subscription tiers, and each provides a different number of total responses.

Response Tier	Monthly	Prepay	
		6 Months	12 Months
1,000 Responses per month	\$13.50	\$72.90 Save \$8.10	\$137.76 Save \$24.24
4,000 Responses per month	\$27.00	\$145.80 Save \$16.20	\$275.40 Save \$48.60
7,500 Responses per month	\$45.00	\$243.00 Save \$27.00	\$459.00 Save \$81.00
15,000 Responses per month	\$67.50	\$364.50 Save \$40.50	\$688.56 Save \$121.44

To take a closer look at Survey prices, visit the Pricing page on our website:

<http://www.verticalresponse.com/pricing/surveys>

Also note that 501c3 non-profit organizations within the US, and similar organizations in other countries, get 15% off all survey purchases. Take a look at the aforementioned Pricing page on our website for details on how to sign-up for our non-profit program.

Now that we've setup your account, let's walk through the steps for building your first survey. (See page 4 for a quick start.)

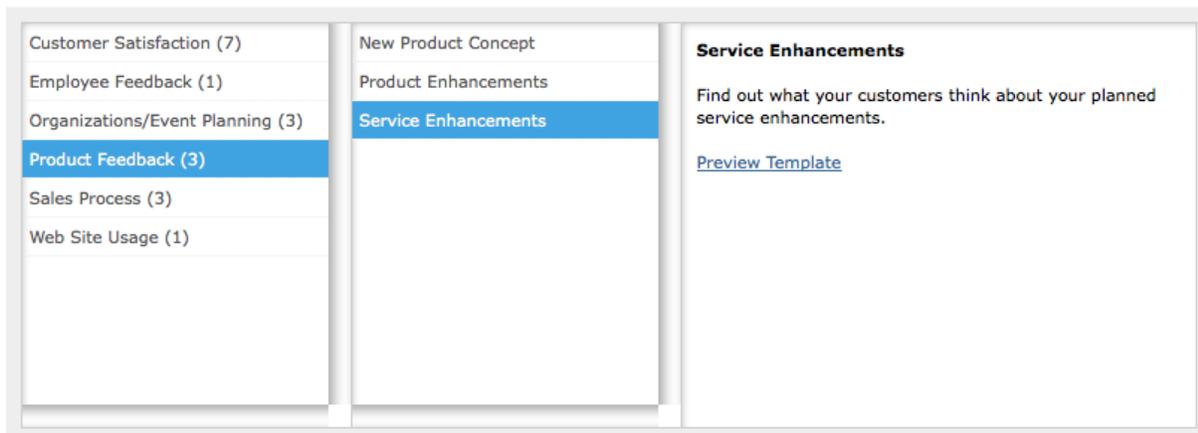
Step 2: Create Your Survey

When you're ready to build a survey, go to *Surveys > New Survey*.

This will open the Survey "Get Started" page, where you create the basic settings for your survey. The important sections are:

Template

You have the option to build a survey from scratch or to start with a pre-made template. There are a number of templates sorted into categories like Customer Satisfaction, Event Planning and Web Site Usage. While the templates may not be perfectly written for your goals or audience, they are excellent guides on how to write good questions on the topic you select.



Survey Type

There are two "types" of surveys:

6. **Traditional** – In a traditional survey you can see the name and contact info for each of your individual respondents. This allows you to follow-up with certain groups or individuals following the survey.
7. **Blindfold** – In a blindfold survey all respondents are anonymous. Individual responses can still be viewed, but everyone is marked as being anonymous. This may potentially lead to more honest responses, particularly if you are asking questions of a personal nature.

Who Can Participate?

It's up to you to decide:

An invite only survey is one that may only be taken by those people you directly invite through a VerticalResponse email. A survey that's open to everyone (both invitees and non-invitees) will enable you to post links to your survey on a website or blog so that anyone can access it.

Survey Type: Traditional
 Blindfold

Traditional surveys allow you to see your participants' contact information (e.g. name, email address).

Who Can Participate? Both invited & anonymous participants (e.g. those visiting from a website link)
 Only invited participants (i.e. those invited via an email)

If you choose to create a traditional survey that is open to everyone then your survey will include a form so that any non-invited respondents can provide you with their contact info (since you have no other way of knowing who they are). Invited respondents would not see this form, as you know who they are already.

Send Notifications

You can receive notifications on an hourly, daily or weekly basis that detail how many people have taken your survey.

These notifications can also be used for alerts. Answers to questions can be set with alerts and if someone provides an alerted answer, this will be shown as part of each notification. Then you are able to see who provided the alerted answer and follow-up with them if needed.

Exit Redirect

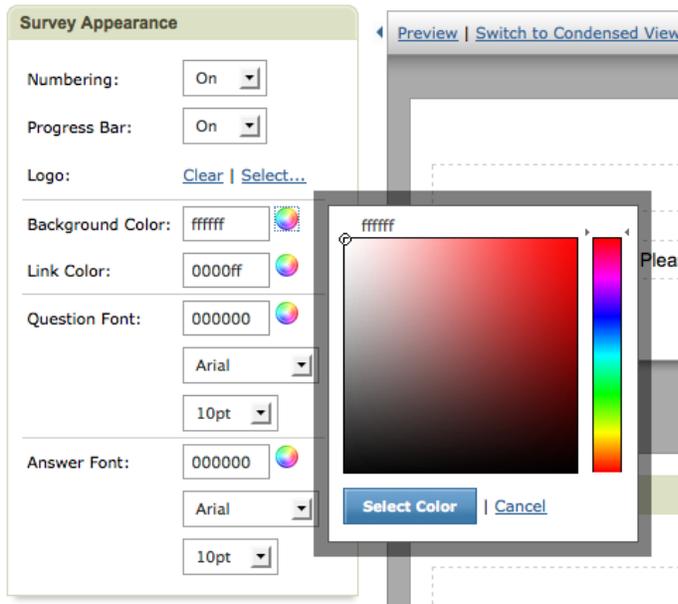
The web address you enter here is where respondents will be redirected when they finish your survey. If you don't enter an address here, then they won't be redirected anywhere.

When you're finished with the Get Started page, click *Next Step*.

Customize It

This will bring you to the **Customize It** page, where you create the content for your survey. This **Customize It** page is broken into three sections:

Survey Appearance



As you might guess, this section enables you to edit the appearance of your survey. You can alter background, link and font colors by entering the appropriate HTML color code (if you happen to know exactly what you want to use) or by clicking the color wheel to the right of each field.

You can also change both the question and answer font faces and sizes by using the provided drop down menus, add a company logo to the top of every survey page, and turn question numbering off if you prefer a numberless look.

List Data Collection

This section lets you select what contact info you'd like to request from people who take the survey. Email Address, First Name and Last Name are selected by default, but you can choose any of our provided standard fields and enter your own custom fields.

Note that this box is only available in a traditional survey that is open to both invitees and non-invitees. You won't need to ask respondents for their contact info in any other setup.

Questionnaire

This section takes up the most space as it's where you add / create / edit all the actual content for your survey. If you've chosen a template to get started, then you'll see a lot of template content that's ready to be edited. If you've chosen to start from scratch, then you'll see a lot of places where you can start adding content.

Either way, there are three types of editable content in a survey:

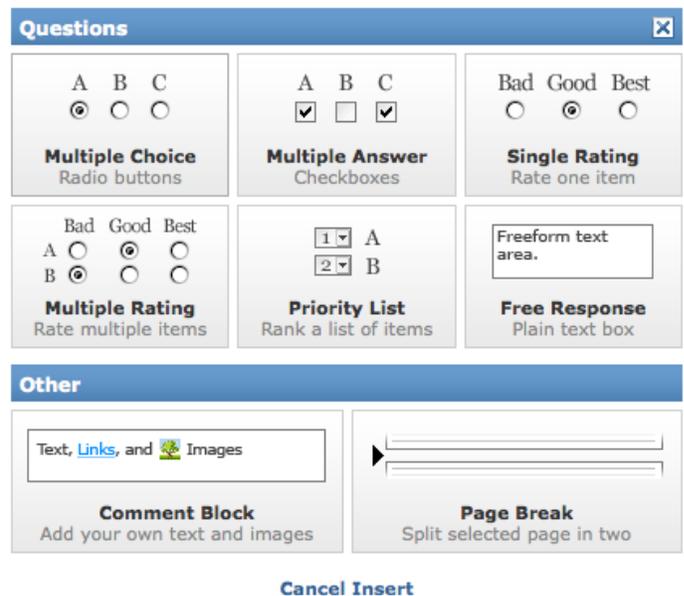
Titles – Every page has a title. Simply click a title to edit it.

Headers – Every page also includes a header that you can either fill in or leave blank. Edit text, images and links within a header section.

Comment Blocks may be added anywhere in the survey by using the *Insert Here* buttons throughout. A Comment Block works in the exact same way as a Header.

Questions – There are six different kinds of questions:

- Multiple Choice** – A question that provides a list of answers from which the respondent may make one selection.
- Multiple Answer** – A question that includes a list of answers from which the respondent may make multiple selections.
- Single Rating** – A question in which you create a rating scale that is used to rate a single item.
- Multiple Rating** – A question in which you create a rating scale that is used to rate multiple items.
- Priority List** – A question in which a list of items are ranked 1 though however many items are listed.
- Free Response** – A question in which the respondent is presented with an empty box within which they can enter any answer they like.





These questions can be created using the same *Insert Here* button that is used to create Comment Blocks.

Any question in your survey can be:



Moved – Click the top of a question to “grab” it and move it a different spot within the questionnaire.



Copied – Any question can be copied and used as a template for another question.



Deleted – Push this button and it’ll be like your question never existed.



Edited – As you might expect, you can edit everything about your question.

Editing Questions

You can, of course, edit both the questions and answers associated with any of your questions. Clearly labeled text boxes are provided for both, as seen here:

Question:

How far are you traveling to attend the event?

Answers:

I'm a local!

I live one state away.

I live in another part of the country.

I'm an international traveler.

I'll be visiting from my home on the moon.

Other (please specify):

[Add new answer](#)

Aside from simply typing in your answers, you can move answers up / down in relation to each other, make answers invisible and set them with alerts. If you set an answer with an alert, then you will be alerted via an email notification every time a respondent provides this answer.

Scroll over an individual answer to access the above referenced options for that answer.



You can also allow people to provide an “other” answer (meaning an answer other than those you’ve listed) and to leave text comments about the question.

After you’ve created / edited your questions, you can move on to *Next*. This will save your work and bring up the **Test It** page.

Test It

This section allows you to test the survey. You can take a single test yourself or email a seed list of people with a link to the survey so they can test it as well. Tests are completely free and you can send out as many of them as you need.

Note that you must test the survey at least once before clicking *Next* and moving on to the **Go Live!** page.

Go Live!

As you might expect, this section enables you to take your survey live so that you can start getting responses to your questions. You have two options on this page:

Take me to my survey dashboard – This takes you straight to the dashboard, where you access reports, do more testing and invite people to take your survey.

Invite participants – This lets you create an email invite with one of our email tools. There is no need to choose this option unless you really, really want to send an invite right this second since you may also send as many invites as you like from the dashboard.

Select the option you like and click the **Go Live!** button.

Step 3. Access Your Dashboard and Reports

Now that your survey is complete, it's time to market it and see what kind of responses you get back. You can do both (along with a number of other options) from your **Survey Dashboard**. Let's take a look at the four sections of the dashboard.

The Dashboard Page

The screenshot shows the VerticalResponse Survey Dashboard for a survey titled "Final Test (VR Certification)". At the top, there are navigation tabs for "Dashboard", "Customize", "Invitations", and "Reporting". Below the tabs, the survey title and a URL are displayed, along with a "Live" status indicator. The dashboard is divided into several sections:

- Survey Actions:** A list of actions including "Preview Survey", "Test it Out", "Invite Participants", "Copy Survey", "Close Survey", and "Revert to Draft".
- How Far They Got:** A pie chart showing the distribution of responses across 11 pages. The legend indicates: Page 1 (4), Page 2 (0), Page 3 (0), Page 4 (0), Page 5 (1), Page 6 (0), Page 7 (1), Page 8 (0), Page 9 (0), Page 10 (1), and Page 11 (29).
- Survey Statistics:** A table showing the number of responses for different categories:

	Sent	Viewed	Started	Completed	Alerts
Invited	0	0	0	0	0
Anonymous	-	10	1	29	0
Test (Clear)	-	4	0	0	0

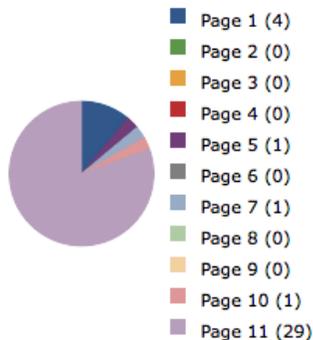
Below the statistics table, there are links for "View All Responses" and "Since Launch" (with a dropdown arrow). The "Most Recent Alerts" section shows "No recent alerts." and a link for "View All Alerts".

As the name implies, this is the main page for the dashboard. From here you can:

- ✓ **Copy the Survey Link** – There is a link at the very top of the dashboard page. You should use this link for your website, blog or emails outside of VerticalResponse. You should not, however, use it for emails sent out through VerticalResponse. There is a better way to link to your survey for invitations like those.
- ✓ **Preview Survey** – Just what it sounds like, a full preview of your survey.
- ✓ **Test It Out** – You can continue to test the survey yourself or send out free tests to other people.
- ✓ **Copy Survey** – Make a copy and use it as a template for a new survey.
- ✓ **Close Survey** – Close your survey so people can no longer respond to it (don't do this until you've received enough responses).
- ✓ **Revert to Draft** – This will take your survey back to draft status as if you never launched it. This option will erase your reporting, so only do it if you haven't yet received any responses to your questionnaire.

You can also see how far respondents get within the survey (do most people make it to the end? Do a lot of people drop off on page 4?) and see exactly how many responses you've received.

How Far They Got



Customize

This section provides access to the same tools you used to build the survey. Everything works in the exact same way as before, except you can't delete content from a live survey. If you want to get rid of a question or an answer, edit the question and either hide the answer (using the visibility icon that appears next to the answer when you scroll over it) or hide the entire question by unchecking the question visibility box.

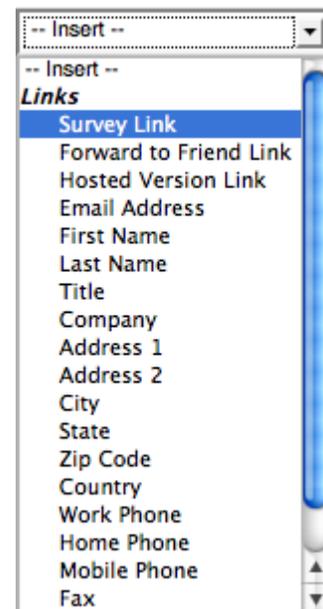
Invitations

From here you can build and send email invitations for your survey. Any of our four email tools (the Wizard, Canvas, Freeform or Plain Text options) can be used to build invitations, so use any tool with which you're already comfortable.

If you've never used our email tools before, take a look at our [Step-by-Step Guide to Email Success](#) or the email section of our [help site](#).

The only notable difference between an invitation and a regular email is that you need to include links to your survey in the invitation. You do this by using the Insert drop-down menus found within each tool and selecting the survey option:

This will bring up a dialog box from where you select the survey to which you'd like to link. Creating the link in this way ensures your reporting data will automatically display the name and contact info of every invitee who responds to your survey. If you were to instead simply copy and paste the link provided on the dashboard page, you'll have to request this information from the respondent.



Reporting

Your survey reporting provides detailed information on how everyone responded to the questions in your survey. There are five different reports that can be sorted into two categories: Standard Reports and Comparison Reports.

Standard Reports

There are three standard reports:

Summary – This report provides a summary of how all respondents answered all the questions in your survey.

List – This is a list of all the people who responded to the survey. If you did a Blindfold style survey, everyone in this list will be marked as anonymous.

Individual – This report shows how each individual person answered your questions. Clicking on a name (or anonymous id number) in your list report will pull up the individual report for that person.

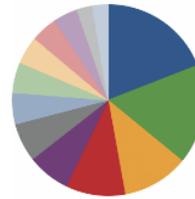
These reports can be printed out, exported to a spreadsheet file or saved as a PDF. The members of the list can also be turned into a mailing list for use with an email.

In addition, these reports include a filtering option that can be used to drill down to specific groups of people based on how they responded to your questions. The filter box on the left-hand side of the screen enables you to *Edit Questions* in order to select the questions and answers you'd like to use to filter the data. This will cause all the reports to show only those people who provided the answers you selected.

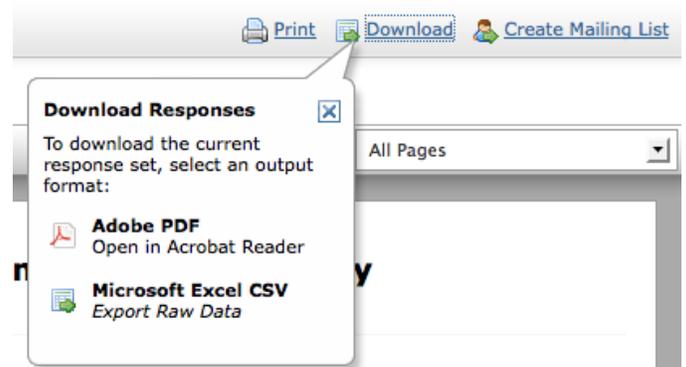
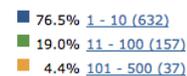
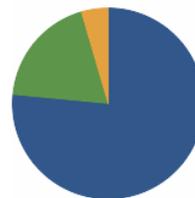
Another easy way to create a simple filter is to click on an answer within the summary report (each answer is linked). This will filter all results in your standard reporting to people who provided that answer.

State of Small Business Survey

1. Which industry is your business in?



2. How many employees does your business have?



When a filter is in place, only the filtered results are printed, exported to a spreadsheet, saved as a PDF or turned into a list should you select to export your data.

Comparison Reports

There are two comparison reports:

Side-by-Side – Use this report to compare two summary reports side-by-side. You filter each summary report down to only see the responses from people who provided a specific answer to one question, so you can compare how the two separate groups answered the rest of the questions in your survey.

Crosstab – This directly compares the answers to two questions, allowing you to see if the answers your respondents provided to one question had a direct correlation to the answers they provided to another question. This is useful for comparing demographic questions to other questions – i.e. *did the respondent's age affect their answer to this question* (for example).

Print out the comparison reports to take them offline or use them to decorate the walls of your home.

Thus concludes our tour of the survey application. Ready to get started? Login to your account at VerticalResponse.com and setup your first survey! You get 25 free survey responses to give it a spin.