Creating a Phone Survey

A Step-by-Step Worksheet Guide

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

1. Plan your messages and questions.
2. Build a Survey Template.
3. Test your survey.
4. Schedule your Survey Job.

Step 1: Plan your messages and questions.

Your survey should have an introductory message, a few questions, and a conclusion, or good-bye message.

Introductory Message: This message is the greeting participants will hear when they answer their phone.

_____

_____

_____

_____

_____

_____

_____

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. Also you may select up to nine possible responses, although you can have as few as two. There will be spaces for additional questions to follow. Your questions and possible responses should be simple, clear, and easy to follow. Users can press the star key to repeat a question, but you will need to tell them that in your question.

For example:

"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."

Question 1

_____

_____

_____

_____

_____

_____

_____

Question 2

_____

_____

_____

_____

_____

_____

Question 3

_____

_____

_____

_____

_____

_____

_____

Question 4

_____

_____

_____

_____

_____

_____

_____

Question 5

_____

_____

_____

_____

_____

_____

_____

Good-bye Message: This is the message that the participant will hear when they have finished answering all of your questions.

_____

_____

_____

_____

_____

_____

_____

Answering Machine: This is an optional message that participants will receive if their answering machine answers the phone. *Note: If you leave a message on an answering machine, the system will not attempt to call the number again.*

Sample message: "Hello. This is a message from Anytown Elementary. Our system was 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."

_____

_____

_____

_____

_____

_____

_____

Now that you have finished planning your survey messages and questions, you are ready to move on to the next step.

Step 2: Record your messages and questions.

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 subtab.
2. Click the Create New Survey Template button.
3. Follow the Guide help in the page to complete your survey. 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.

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.

1. Click the Notifications tab followed by the Surveys sub tab.
2. Click the Schedule Survey button in the My Active and Pending Surveys section to access the Survey Scheduler.

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

- **Survey Name:** Enter a name for your Survey Job here.
- **Description:** Enter an optional description for your survey here.
- **Job Type:** Choose the job type you are sending.
- **Survey Template:** Select the Survey Template you created in the previous steps.
- **List:** Select the test list which contains only your contact information.
- **Start Date:** Enter the date you would like your Survey Job to being running on.
- **Number of days to run:** Select the number of days you would like your job to run.
- **Survey Time Window:** Select the earliest and latest times you would like the system to contact recipients with your survey.
- **Email a report after 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 try 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.