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Survey Campaign Training Manual

The LeadMaster Survey Campaign feature [1] is designed to help you get feedback from the contacts in your LeadMaster CRM. This document contains step-by-step instructions to show you how. Should you need assistance your LeadMaster representative will be happy to help you.

Contents

Creating your Survey Form

1. First step is to create a Survey Form that you will use for the Survey Campaign. By adding a new form, you can add your survey questions on any types of Forms.

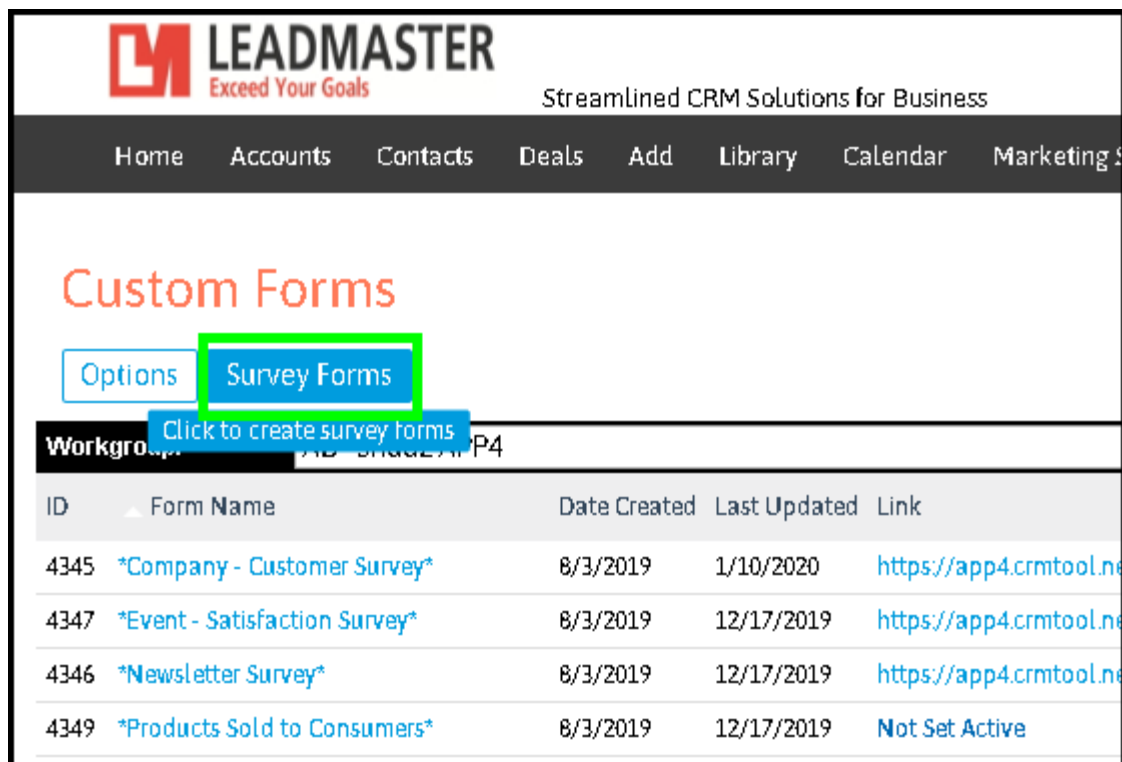   - Go to (1) **Admin**, select (2) **Custom & Web Forms**

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[1] Note: Survey Campaign feature is available only in APP4 https://app4.leadmastercrm.com/index_logon.asp

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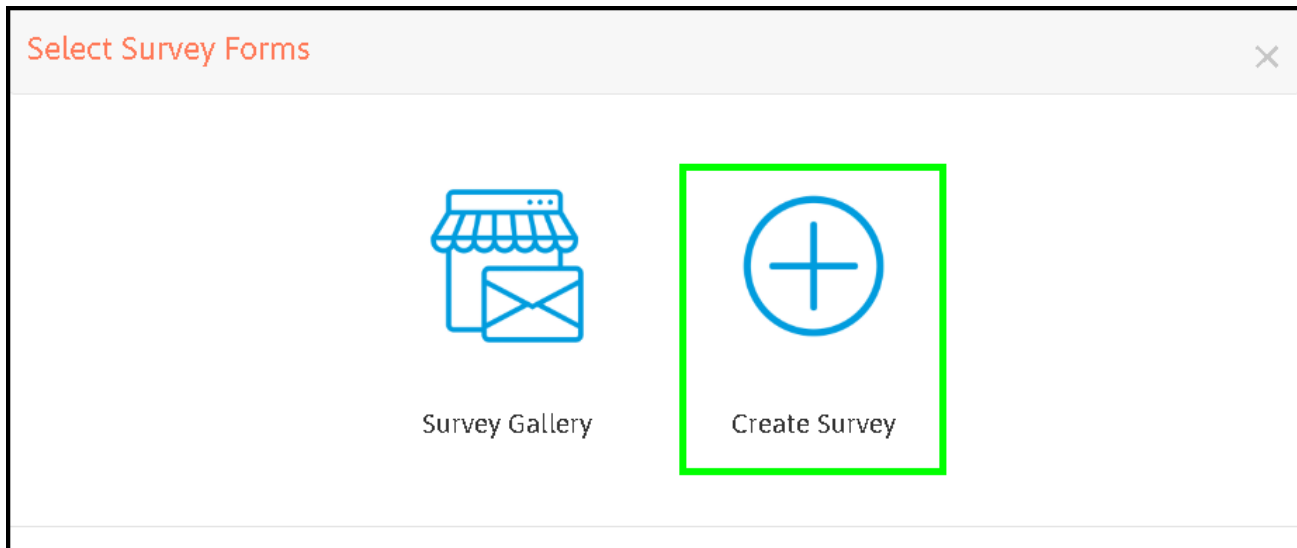by LeadMaster

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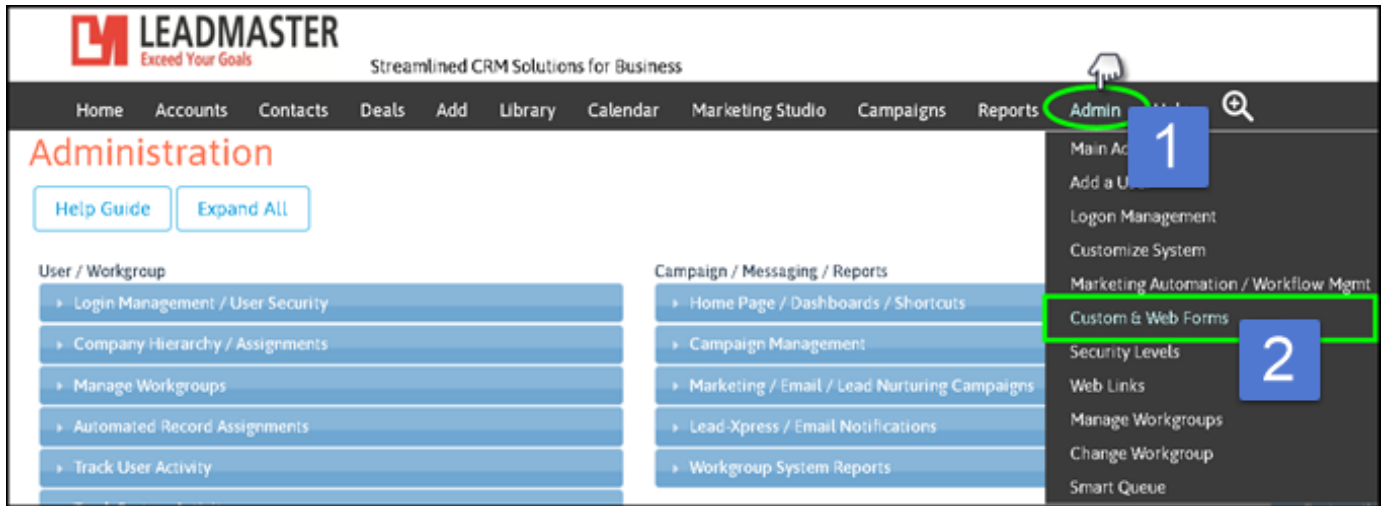
Add New Form

- This brings you to the Custom Forms list page. Click on **Survey Forms.**

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- A modal window to Select Survey form opens that gives you option to select a ready template from the Survey Gallery and option to Create Survey. **Click on Create Survey.**

- Another way of Creating a Survey Campaign - Mouse-over on the (3) **Options** button, then select (4) **Add New Custom Form**
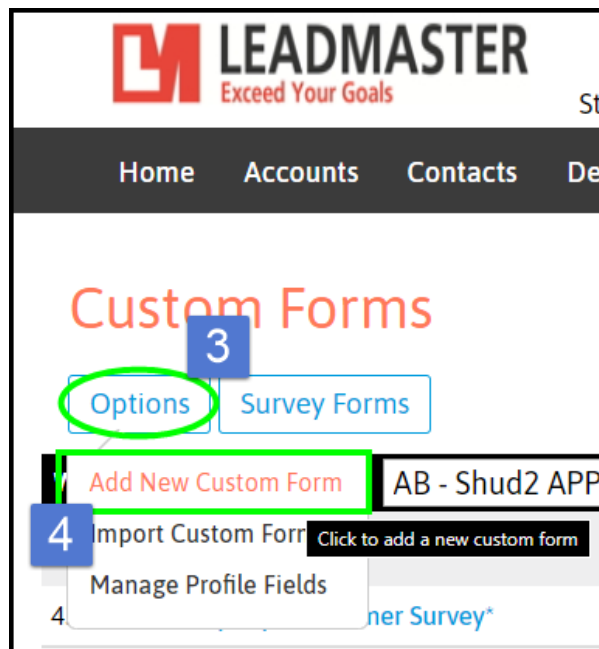
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- Once in the Add Custom Form page, (5) give your Form a Name and it is important to (6) **select "YES" for Survey Forms option**, then Click (7) **SUBMIT**

Add Custom Form

Custom Forms List

5 Form Name: Suggest Test Form   max. 35 characters

Response Page: displayed after custom form is submitted

Available as an Attached Form: ● Yes ○ No

Required when Adding New Records: ○ Yes ● No

Automatic Numbering: ○ Yes ● No

Update General Comm **6** ○ Yes ● No

Survey Forms: ● Yes ○ No

Custom Form Theme: Classic ⬍

Theme Style: --None-- ⬍

Date Format: mm/dd/yyyy ⬍   Applies to web-enabled forms only

Form Type: Web ⬍

7 SUBMIT CANCEL

The other options here are available to customize your Custom Form, please click on the links below to learn more about setting up Custom Forms

Knowledge Base http://162.208.91.34/kbbase/index.php?View=entry&EntryID=62
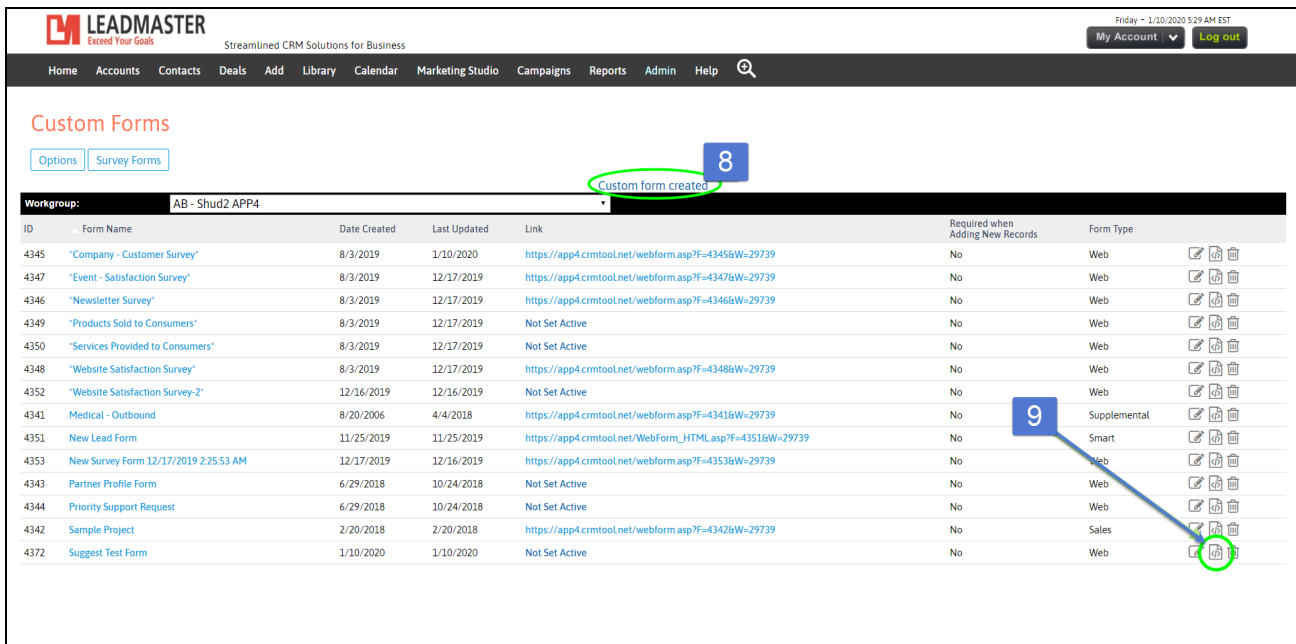
Video tutorial: Custom Forms Part 1

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- After submitting the new custom form, it will bring you back to the Custom Forms list and notify you that the (8) **form has been created**.

  Notice that the form does not have a Link and is not set active, that comes in after compiling the new form.

- Click on the (9) **Design Form icon** to add the questions in the form.

Add Survey Questions

- In the Design page, add questions by clicking on the (10) ✚ icon.

Choose the type of question you want to add. All the types of questions can be added in to your form, the **critical part of a Survey form is the Rating an Item question**.

- Click on (11) the **Rating an Item** [2] box, it will bring you to the details of this question type.

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[2]Note: The "Rating an Item" question contains multiple responses and cannot be mapped to any other fields.

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In general, the other Question Types here are also used for creating any types of Custom Forms. To learn more about it, please visit the links:

KB for Custom Forms Design page:
http://162.208.91.34/kbbase/index.php?View=entry&EntryID=63

KB for Adding New Questions:
http://162.208.91.34/kbbase/index.php?View=entry&EntryID=65

Video URL: Custom Forms Part 2

When adding the Rating an Item question, there are 3 required parts:

- **Questionnaire** (green)
- **Rating Scale** (blue)
- **Rating Items** (red)

- **Questionnaire** - Type in (12) the Question in this field;

- **Rating Scale** [3] - Select (13) the number of ratings – this represents the number of Rating Scale options – type in the options on each boxes;

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[3]Note: Most Special characters are not allowed to be entered in the Rating Scale and Rating Items. The only allowed special characters are spaces ^ tilde ? question mark

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- **Rating Items** [4] - Select (14) the number of items to rate – this represents the number of items to be rated – type in the items or categories to be rated.
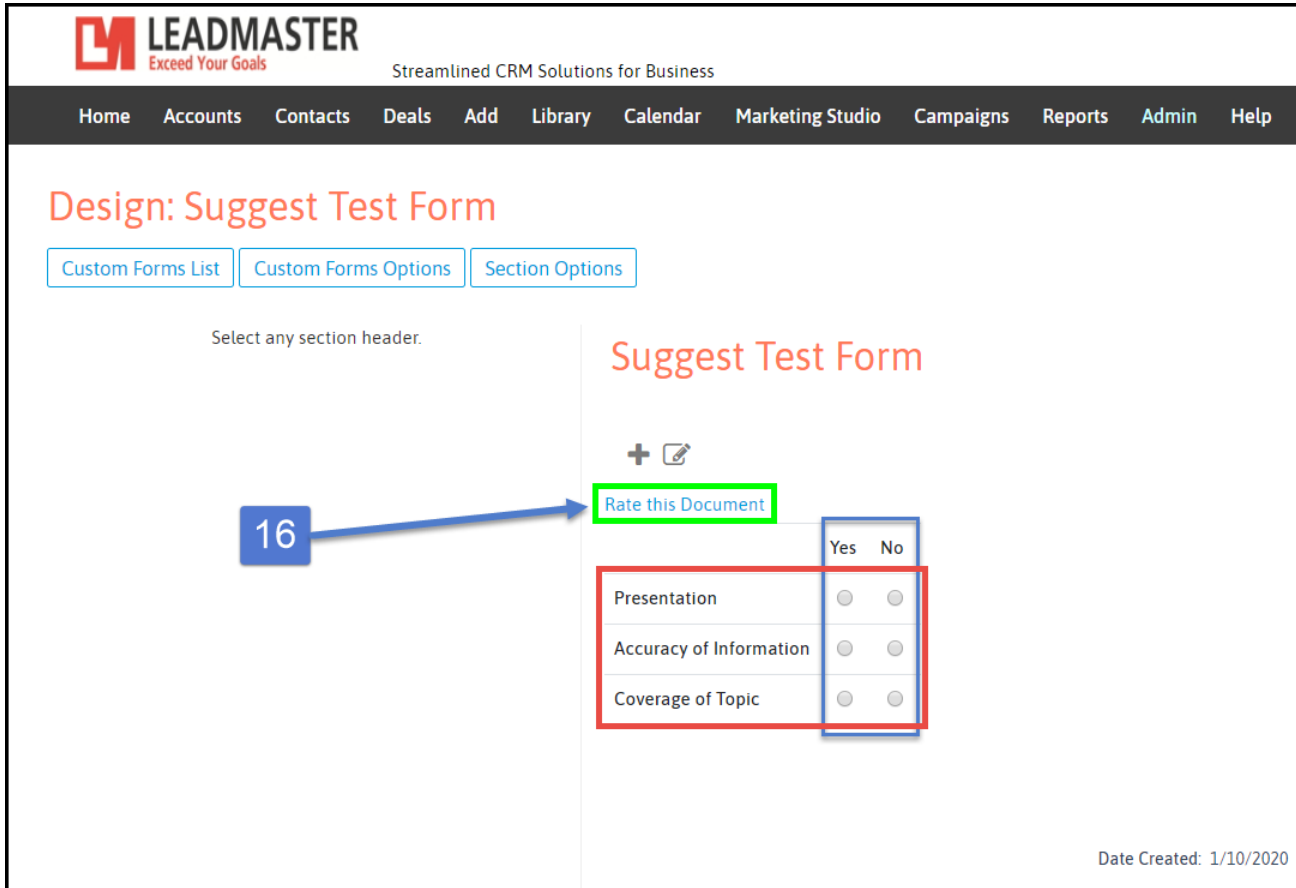
In this example, I have set **2** for **Number of Ratings** under **Rating Scale (Yes, No)**, and **3** for **Number of items to Rate** under **Rating Items (Presentation, Accuracy, Rating items)**.

The next image is the result.

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[4]Note: --same as 3

Editing the Form

- You can always **edit the question** to add more options or change the scale by (16) **clicking on the Questionnaire**

  - It allows you to retype the Question;

  - add/remove Rating scale or Rating items (17) by **selecting the dropdown beside the "Number of Ratings / Items to Rate"**;

  - <mark>edit the options</mark>.

  - remove some options by (18) **clicking on the Trash bin icon** beside each item.
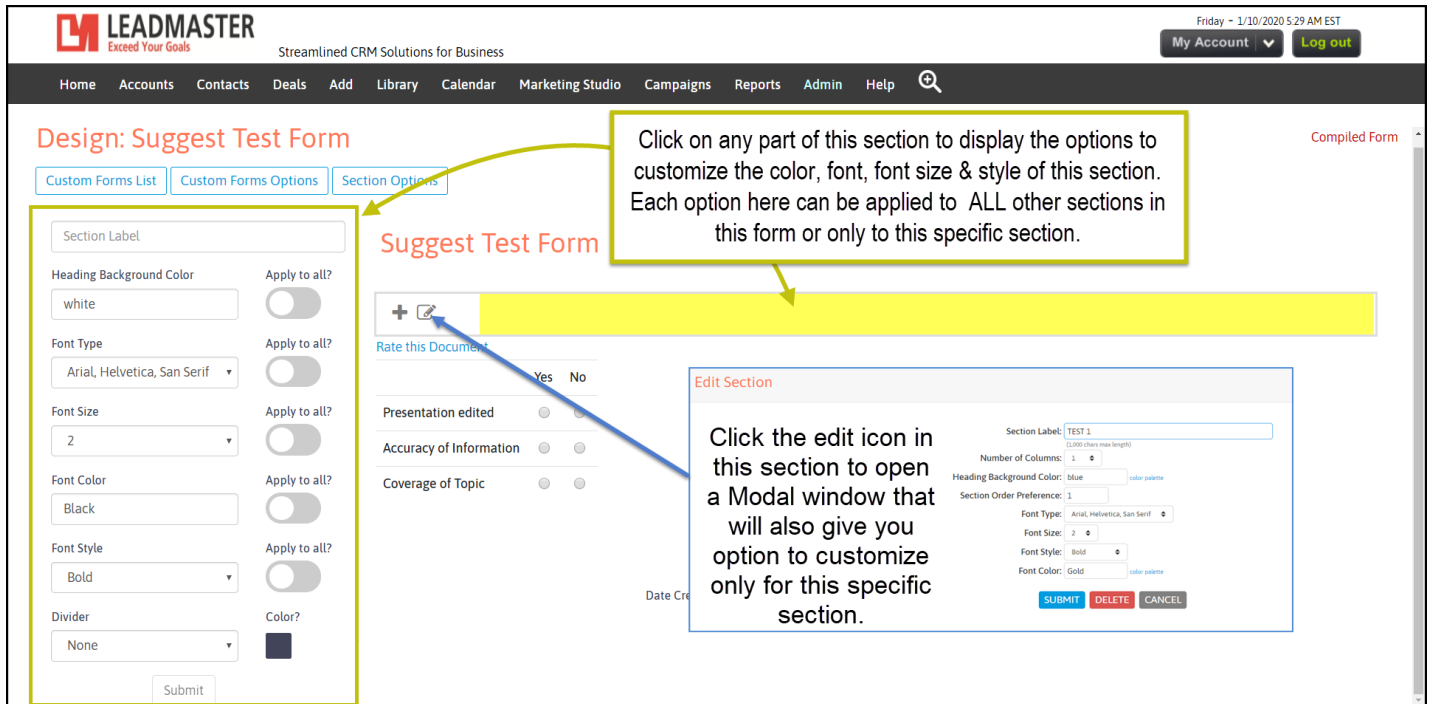
- Click **SUBMIT** when done editing.
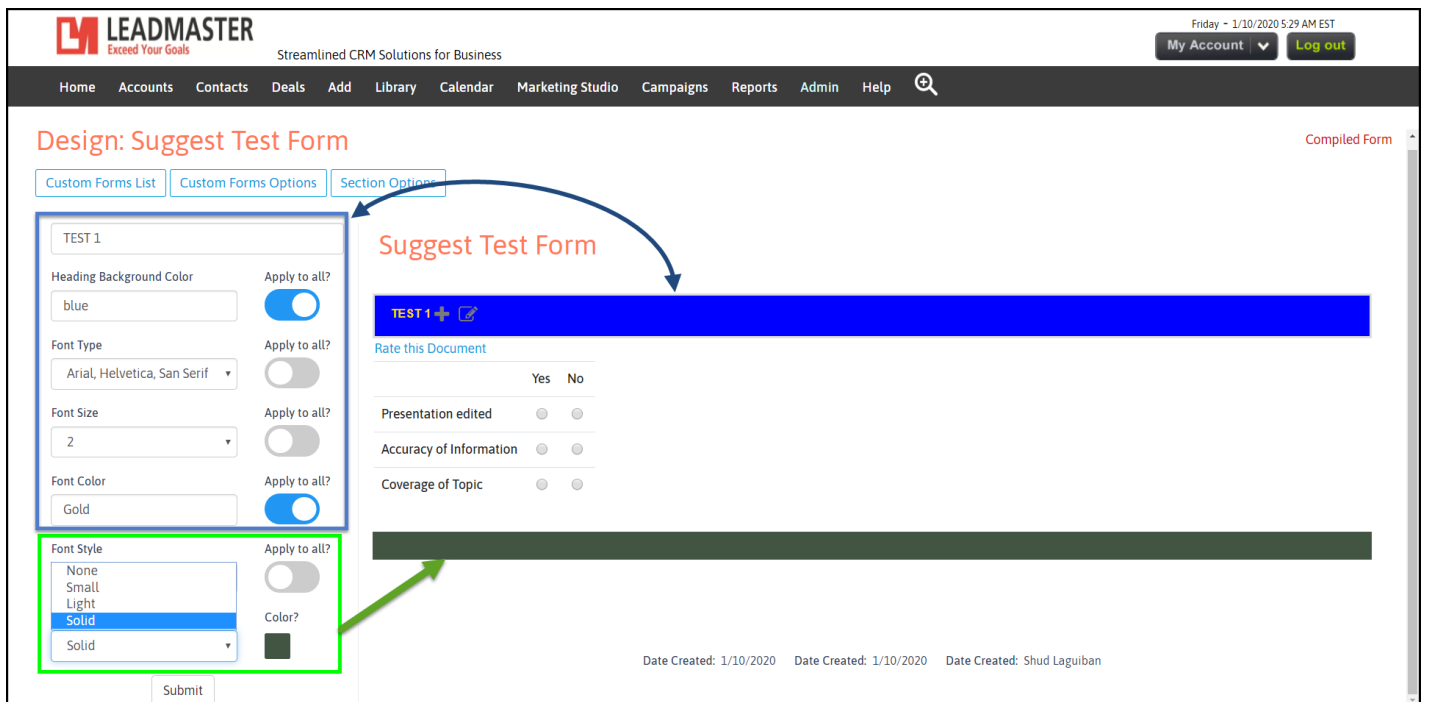
Customizing sections

When designing the Survey form, clicking on the section part (yellow) will give you more options on how you want your section to look like. You can adjust the Heading Background color and apply it to All sections or only to this section; make adjustments to the Fonts; also add a divider on each section.

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Click on any part of this section to display the options to customize the color, font, font size & style of this section. Each option here can be applied to ALL other sections in this form or only to this specific section.

Click the edit icon in this section to open a Modal window that will also give you option to customize only for this specific section.

Below is the outcome of the customization.
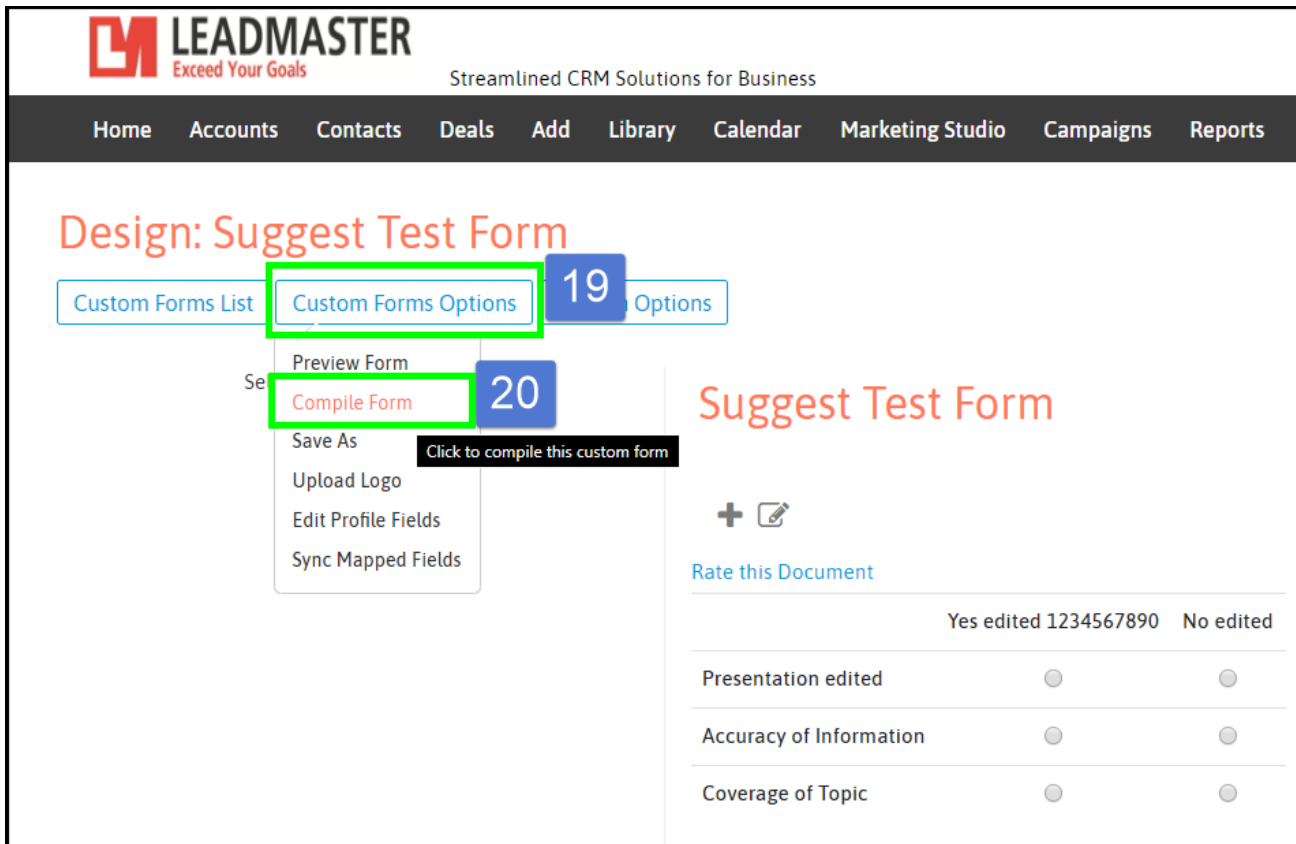
Compiling Form

Your Survey Form is almost ready; you will need to COMPILE FORM to generate a URL which can be inserted when creating a Survey Campaign.

- On the Design Form Page, **mouse-over (19) Custom Form Options**, then click (20) **Compile Form** [5]

- **Click OK to Proceed**.

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[5] Note: You can always edit your Custom Form / Survey Form even if the form has already been compiled
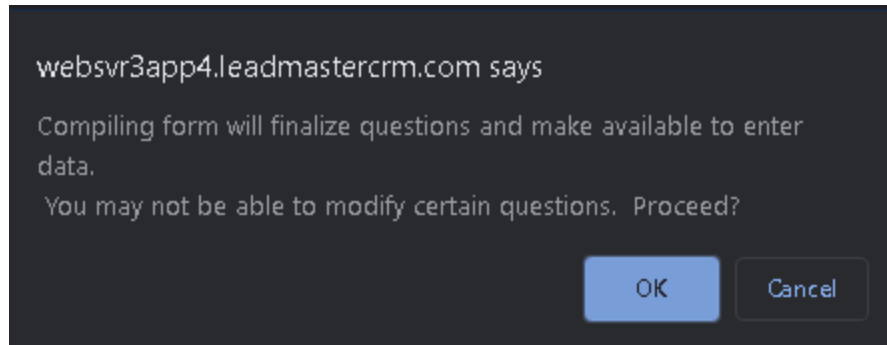
After compiling the form, you will then be redirected to the Custom Forms list along with the created link ready for your Survey Campaign.

In the Custom forms list, even though it is a Survey form, it is going to display as **WEB** Form type, editing is the same as any forms but you do have to **set it to YES on Survey Form Options** to make it available as a Survey form when launching Survey Campaigns.

This also applies to the following types of Forms.
- Supplementary
- Smart
- Case

Launching Survey Campaigns

2. On to our 2nd step, you can now send a Survey Campaign. Similar to Email Campaigns, you can select your audience from Leads or Contacts and include contents in the Email, though this specifically is for the Survey Form/s you have available in your Custom Forms list.

• From the Banner Menu, click on (21) **Marketing Studio**. The menus will display and we want
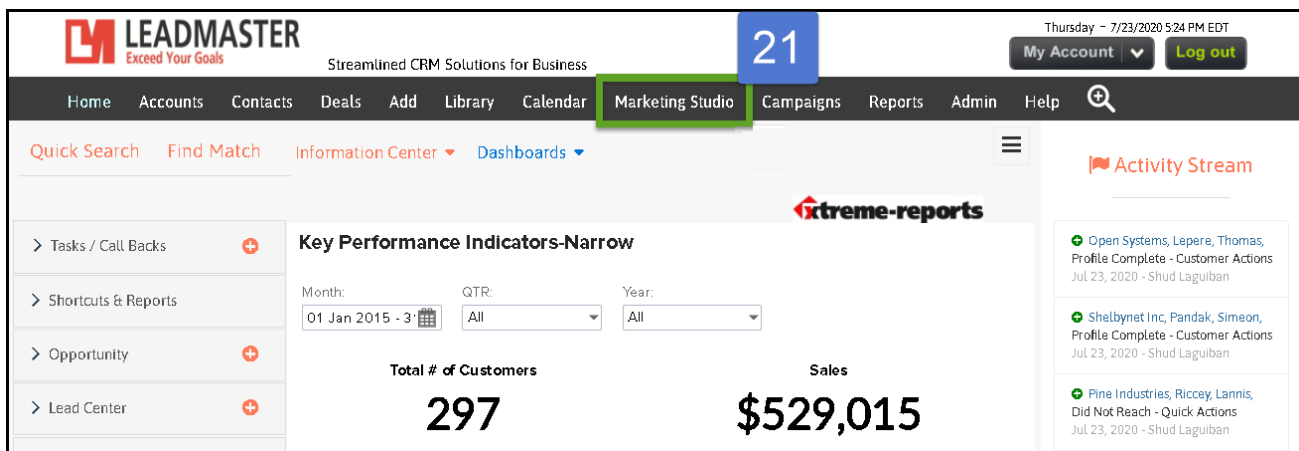
the **Campaign Survey Wizard**. Add a new Survey Campaign, click on the (22) **Add New** Icon for a new Survey Campaign.
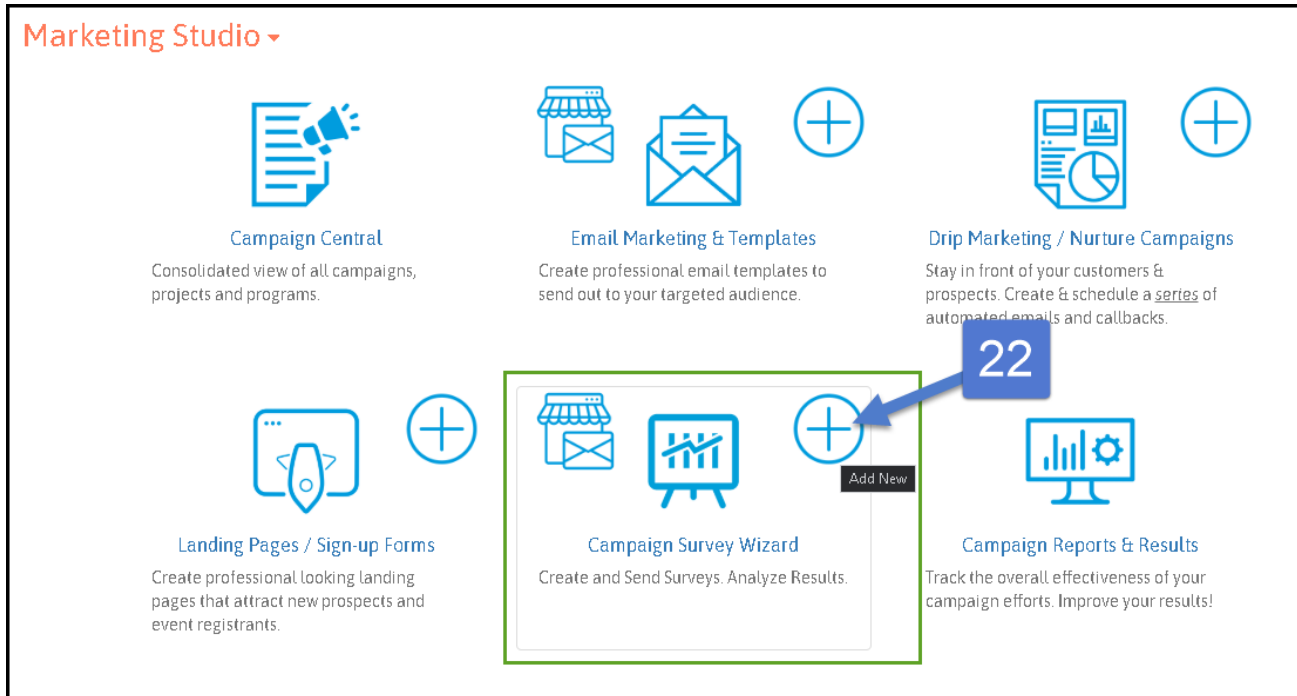
There is another way to access the Survey Campaigns by clicking on (23) **Campaigns** along the Banner menus, (a) **drop-down arrow**, then select (b) **Survey Campaigns.**

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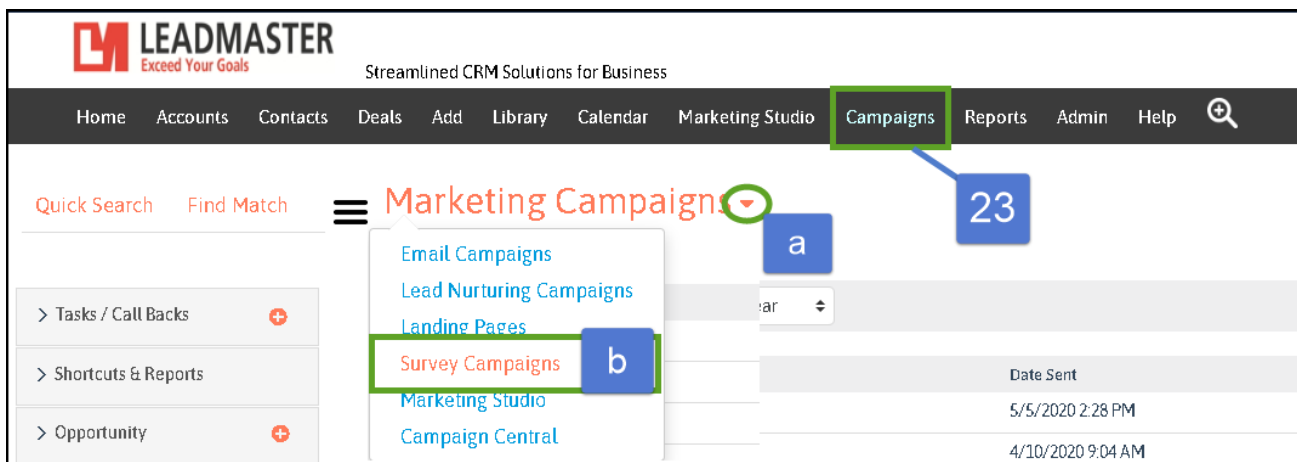
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When in the Survey Campaign, click on (24) **Options**, then (25)**Launch a Survey Campaign**
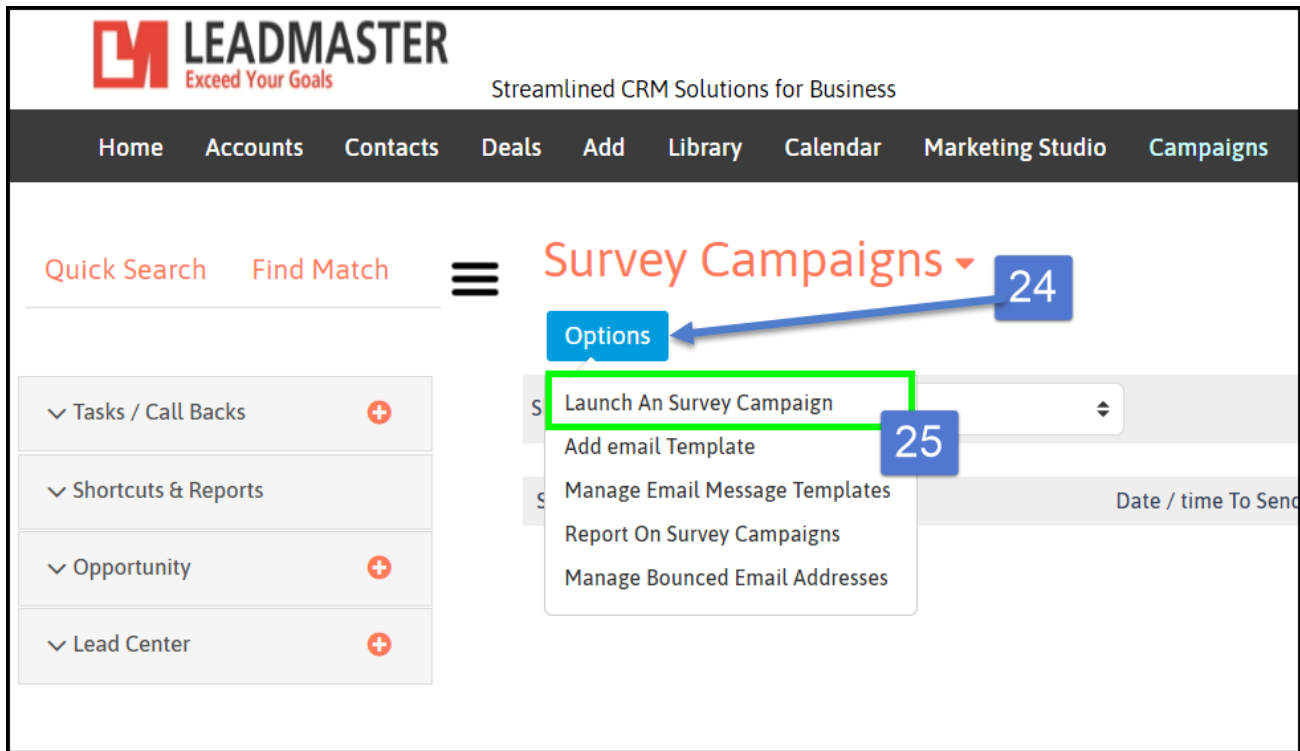
Details of a Survey Campaign

- Then on the Launch Survey Campaign page, fill in the details just like in launching Email Campaigns but instead of inserting Custom Forms, the option to insert the Survey Form will only be available in Launch Survey Campaigns.

  (26) **Name your Campaign** – Unique name for each Survey Campaign helps in choosing the correct campaign for reporting.
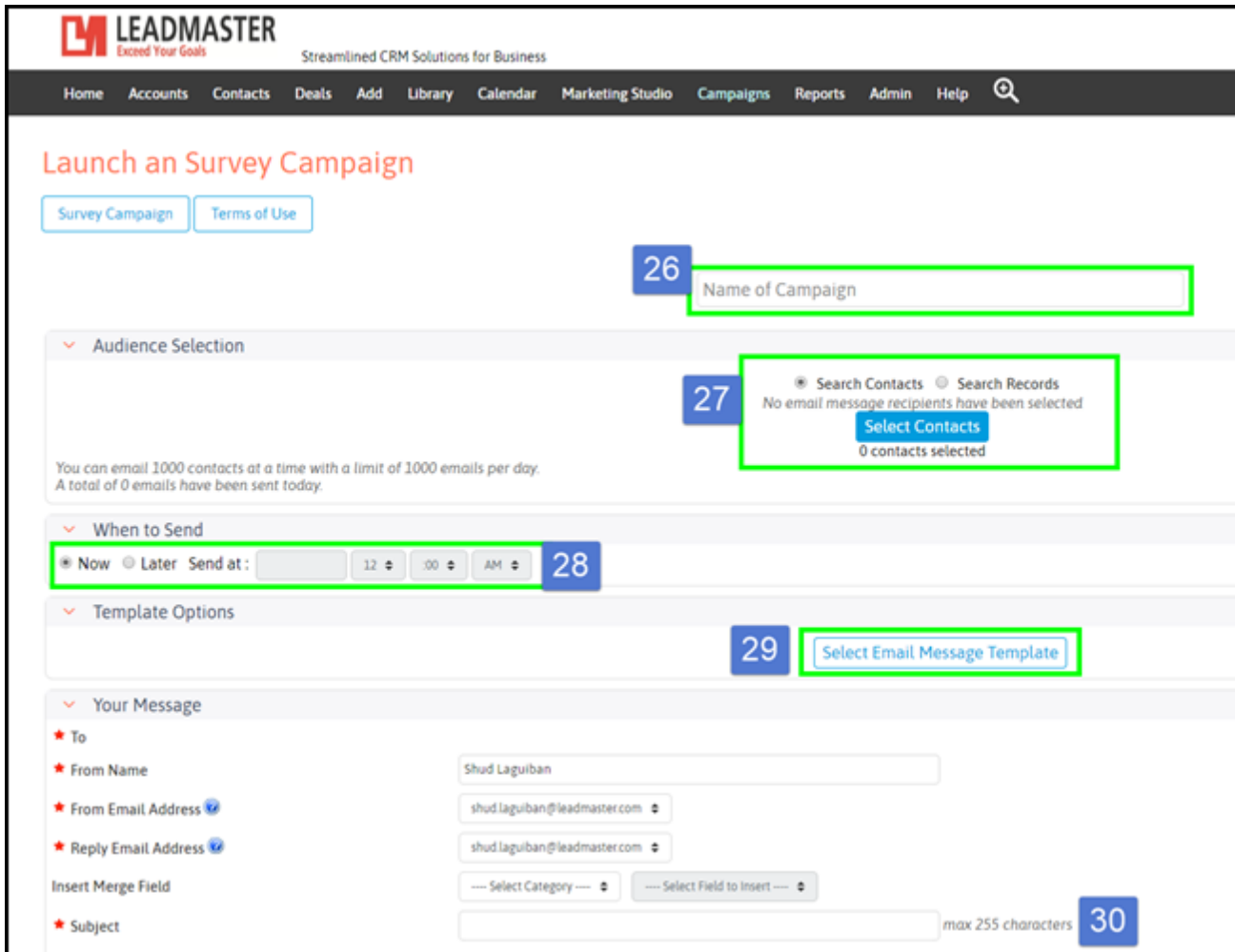
  (27) **Select your Audience (Filter Contacts / Records)** - it is important when selecting audience - that there is a valid Email address in the email address field for each contacts.

  (28) **When to Send** – choose to select send now or at a later date/time. You can edit your Survey Campaign if it is set to send at least 1 hour ahead of current PC time. If within an hour before it the send time, the option to edit will not be available.

(29) **Template Options** – you can select any specific template; this will be in the content of your email.

(30) **Your Message** – This is where you can (a) Insert the Survey Form and contents of your email by clicking on the drop-down, selecting the Survey Form you have available.

Fill in the fields that are mandatory to proceed. In the Subject line, (b) **make sure to have a unique Subject** for each Survey Campaign as you might send the same Survey to the previous recipients, otherwise, you will be notified of the same Subject line though it will still send.

(31) **Signature** – this can be included in the email to be sent out; this is either set manually by entering details in the fields or tick the box for "Include Signature" (this is edited in My Account settings)

(32) **Final Options –** Enter your email address for testing and Send a sample email of the Survey Campaign your recipients would also receive

(33) **Send your Email Message** – if you are ready to Send to your respondents, click **SEND** (this button will be available if you have selected "Now" on the section When to Send); If on a later Date/Time, it will display as **SAVE.**

When sending the Survey Now, notification pops up when you click SEND, click OK to Proceed.
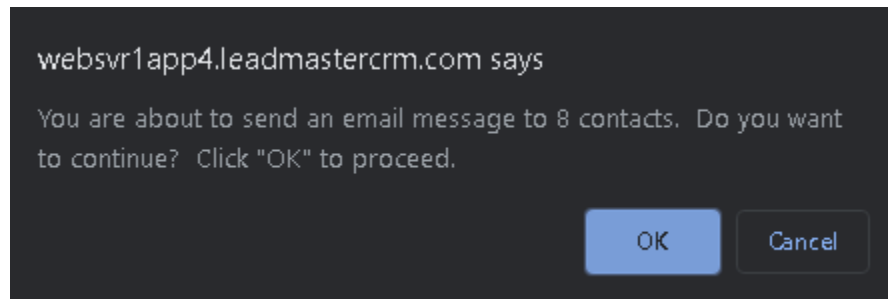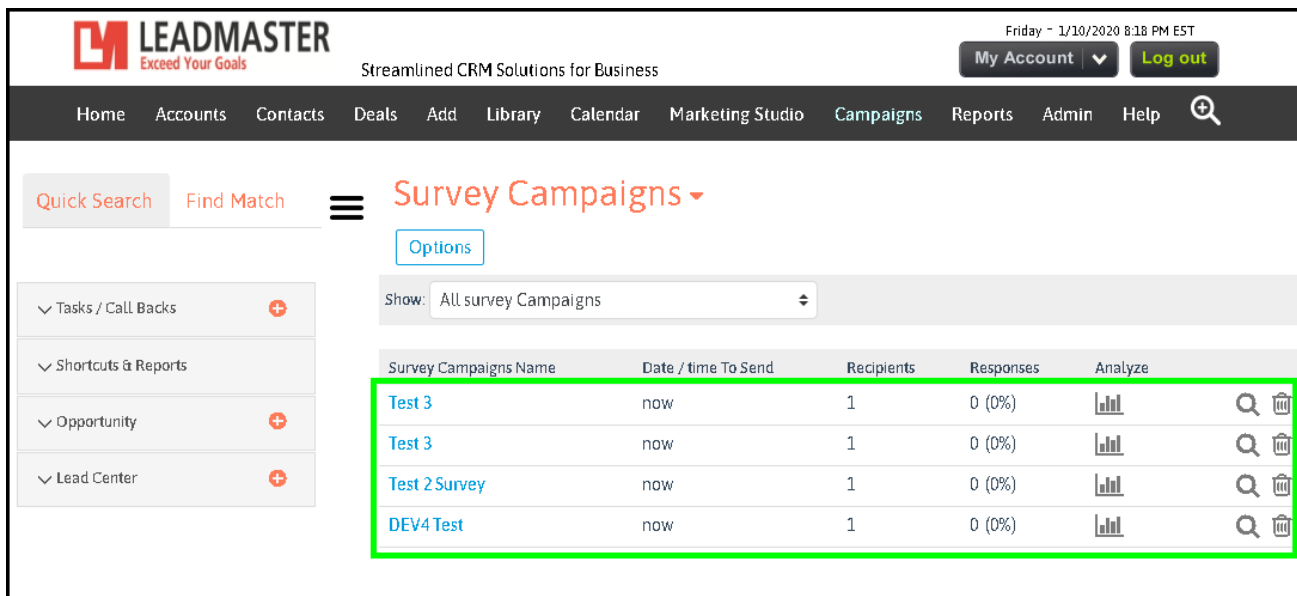
If you will be sending on a later Date/Time have already sent a Survey Campaign with the same Subject line (b). You might want to Cancel and edit your Subject line, otherwise, Click OK to proceed.

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websvr1app4.leadmastercrm.com says

You are about to save an email message to be sent on 7/25/2020 at 10:00:00 AM to 8 contacts. Do you want to continue? Click "OK" to proceed.

OK   Cancel
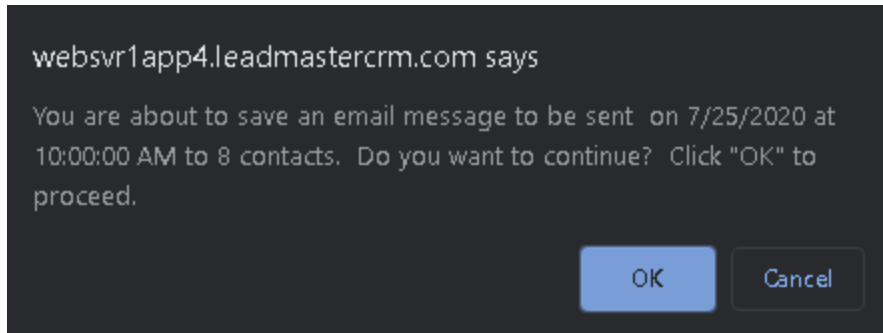
Survey Campaigns List

• Afterwards, you will be redirected back to the Survey Campaigns list and Campaigns that were sent will be displayed on the list.

If you have a long list of Campaigns launched within the past 4 weeks timeline, you can filter out the latest by **clicking on the Show field** to select which to display.

On this list, you can click on the name and icons to access relative information regarding the Survey Campaign.

- **Survey Campaign Name**
  Access to the reports related to this Campaign

- **Analyze**
  Brings you to the Analysis page for drill down analytics

- **Preview**
  Let's you see the preview of the actual email that the respondent has received

- **Delete**
  Deletes the Survey Campaign and will also delete the Analytics Data. Popup notification will ask to confirm - Note that email messages sent via this campaign are not deleted.

Reporting and Analysis

Once you've setup LeadMaster to track your Survey campaign you'll be able to see:

- How many recipients have received and responded to the Survey form.

- How much responses have been generated over time.

- The details of the Responses per Questions.

- The details of the Responses per Individuals.

- And the details of the Report on Survey Campaign.

Analyzing the data will be easy with the help of real-time charts from Question Summaries and Individual Responses of the Survey Campaign.

Reports on Survey Campaigns

This is similar to Email Campaign Reports, however, this is specific to Survey Campaigns instead. To learn more about it, please watch our video: https://www.youtube.com/embed/fPrXYMjNNjA?rel=0;vq=hd720&autohide=1

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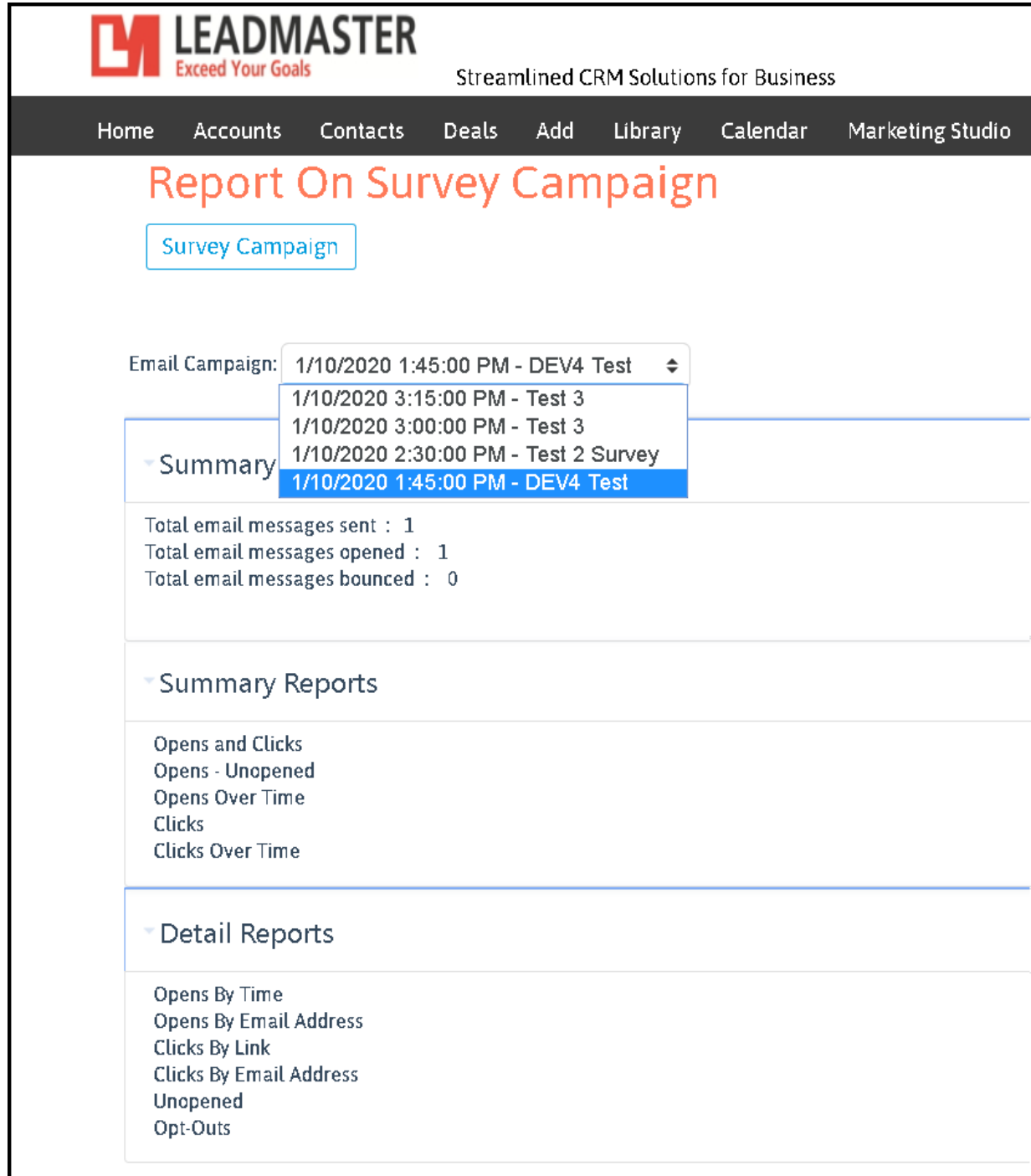
There are 2 ways to access the reports on a Survey Campaign (1) is by **clicking on the Survey Campaign Name**, (2) is by **mouse-over on (a) Options**, then (b) **Report on Survey Campaigns.**

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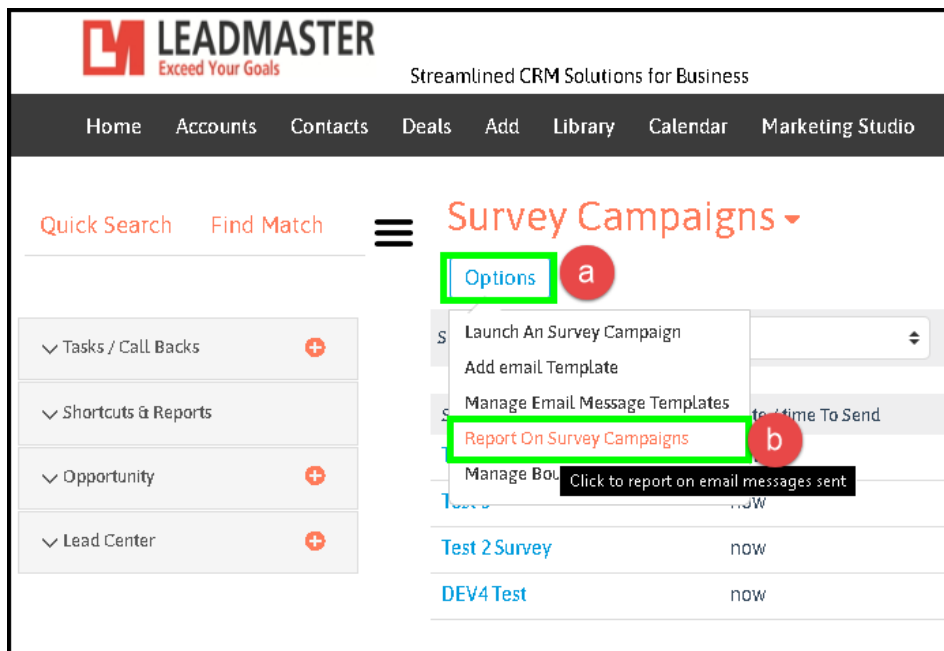
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Details of Reports on Survey Campaign

The Reports on Survey Campaign page has 4 main components.

- **Email Campaign field** – lets you select a Survey Campaign and displays Date and time when the campaign has been sent

- **Summary section** – provides count of Emails **sent, opened and bounced** by Survey Campaign

- **Summary Reports section** – provides details on each report for

  - Opens and Clicks
  - Opens - Unopened
  - Opens Over Time
  - Clicks
  - Clicks Over Time

- **Detail Reports section –** provides details on each report for

  - Opens By Time
  - Opens By Email Address
  - Clicks By Link
  - Clicks By Email Address
  - Unopened
  - Opt-Outs

Granular details that you can view for drill down of data, one sample is for **Opens and Clicks** – you can see here that this Company – Leadmaster with Shud as the contact person with email address of slaguiban@outlook.com has opened the email 4 times and clicked twice at 1:51 PM on 10 January 2020.

Clicking on the **Contact name** brings you to the record page of this account; and clicking on the Menus:

Reports (brings you back to the Reports on Campaign);

Survey Campaigns (jumps to the list of Campaign);

Options (Download / Print the Report)

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Here is another great sample Report by LeadMaster, **Opens Over Time** provides the report in Chart form and lets you choose the timeline when the Emails were opened.
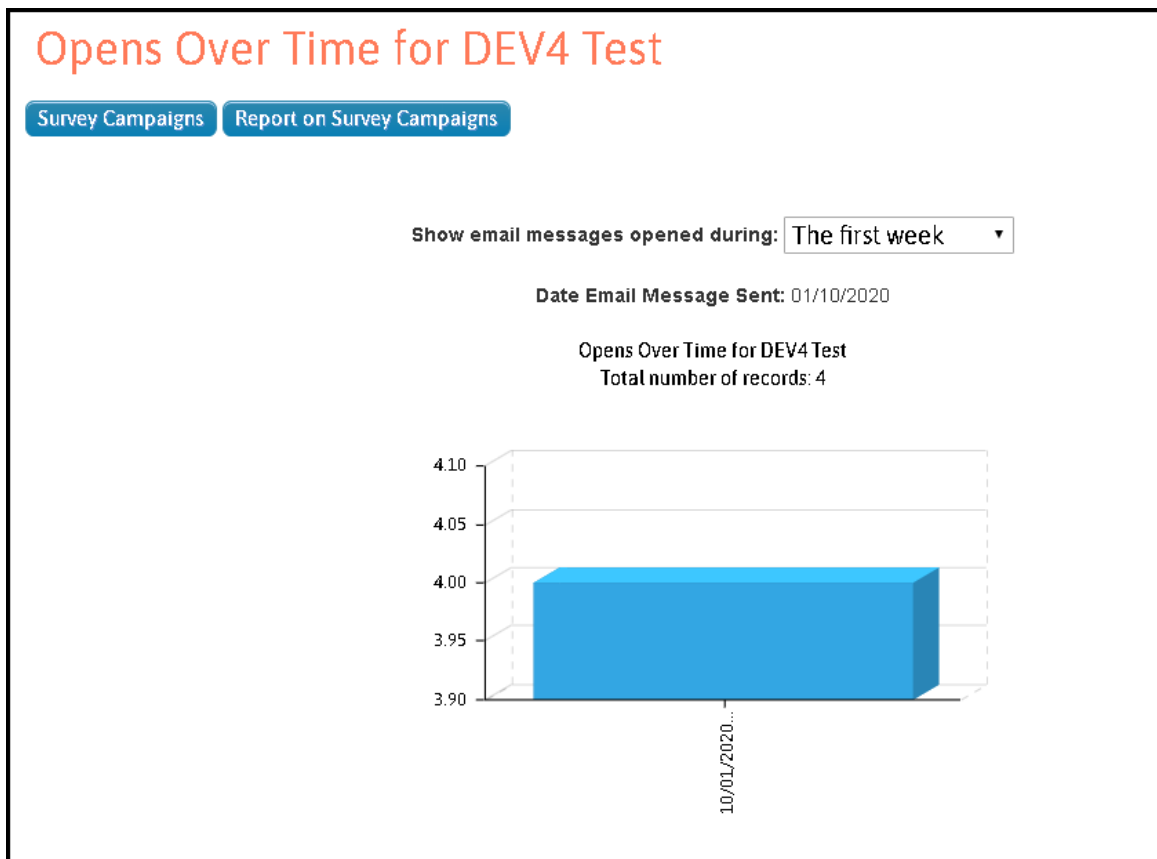
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When you are done with the Reports, you can go back to the Survey Campaigns list by clicking on Survey Campaigns button
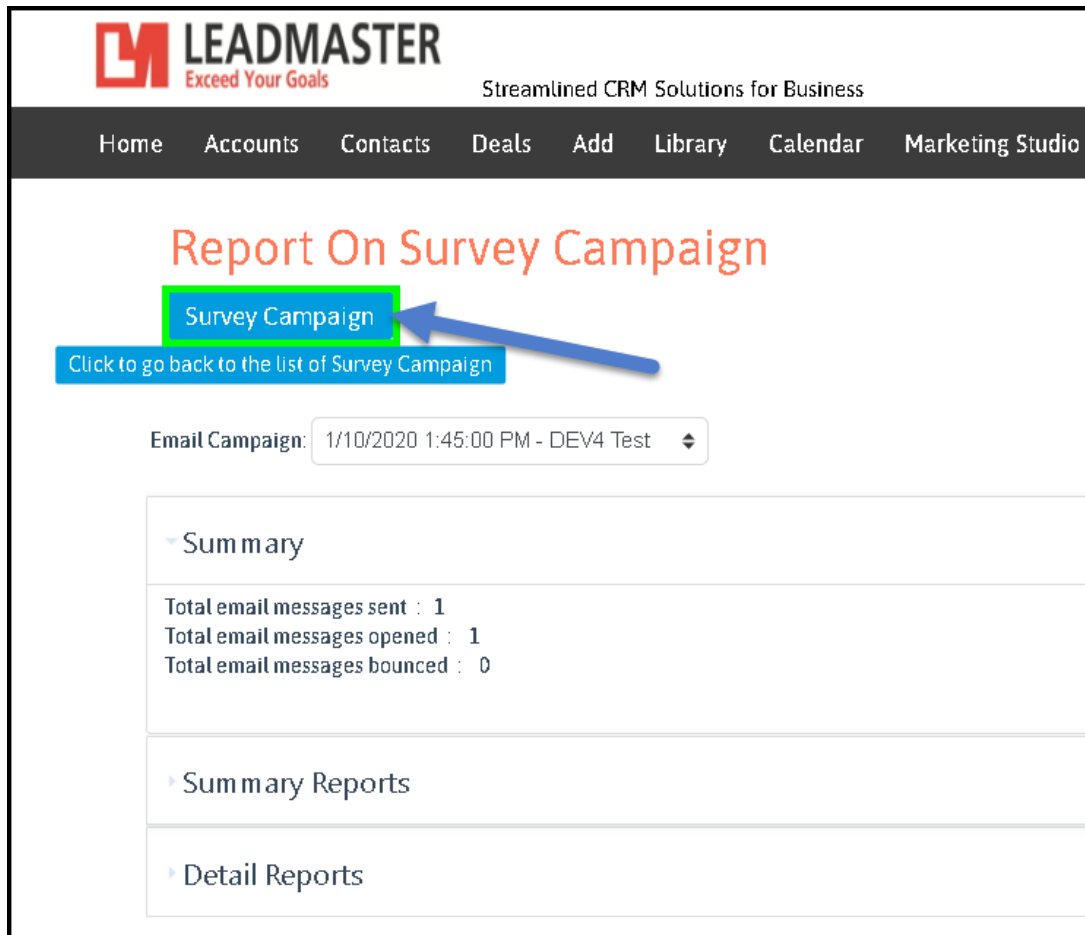
Analysis – Responses and Status

- On this page you will be able to view the Analysis report of the Survey Campaign by clicking on (34) the Analyze button. To access this page, Go to Campaigns, then select the drop-down beside Marketing Campaigns

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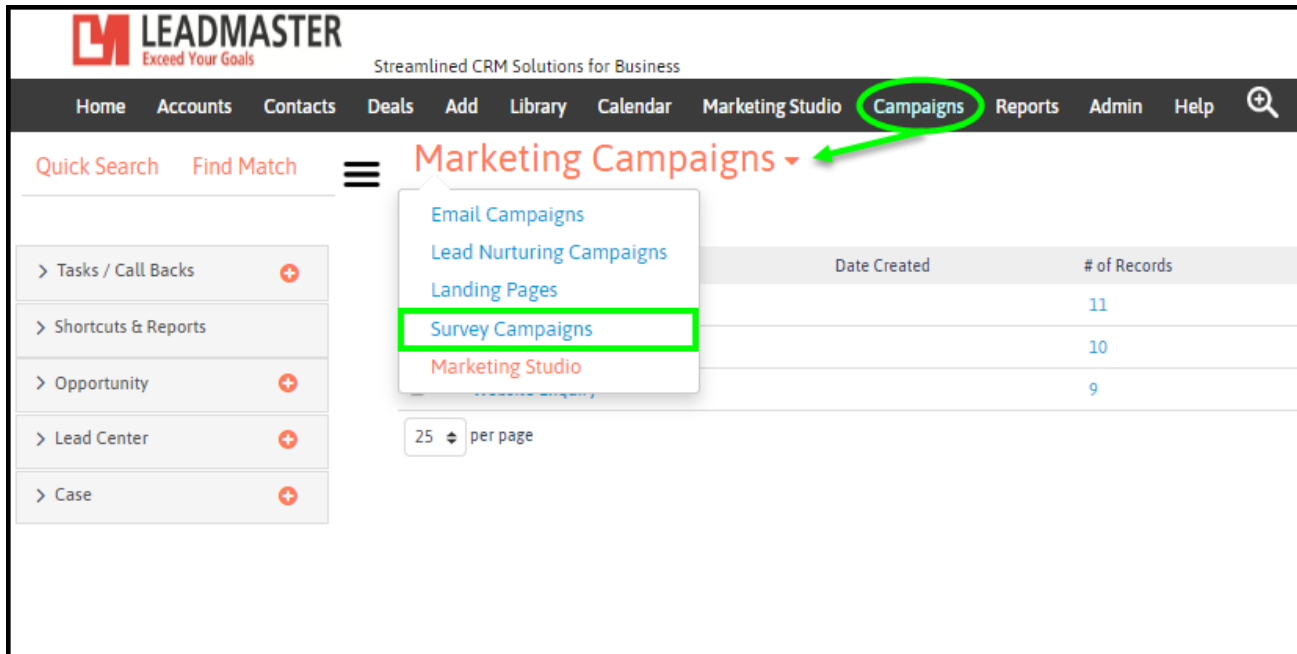
- The list of Survey Campaigns that were launched is displayed on this page, click on the Analysis icon (34) to bring you to the detailed report of the selected Survey Campaign.
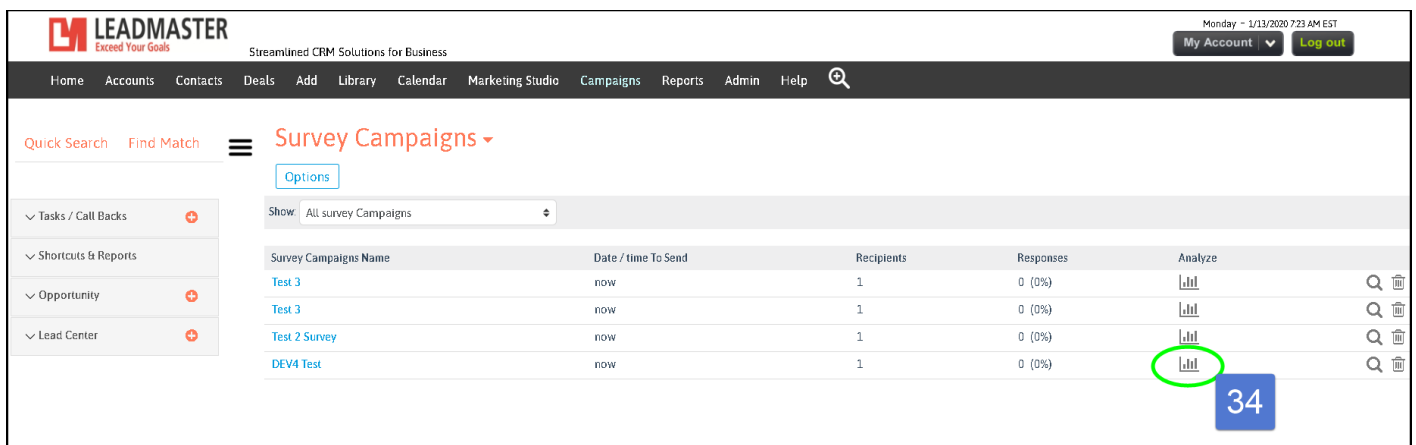
- Next, you will see the Survey Analysis Dashboard and it consists of the following sections:
  - **Responses and Status** section – there are 3 boxes that displays how many responses were Sent, how many have responded to the survey, and the Overall status

o **Total sent** is the number of Recipientswho received the Email with the Survey form.

o **Total Responses** is the number of Recipients who has responded on the Surveyand has submitted the for; and this is also represented by percentage of who has responded back over the Total number of recipients.

o **Overall Survey Status** is currently set static as OPEN. This might change in the future after determinant is set on when status is CLOSED.
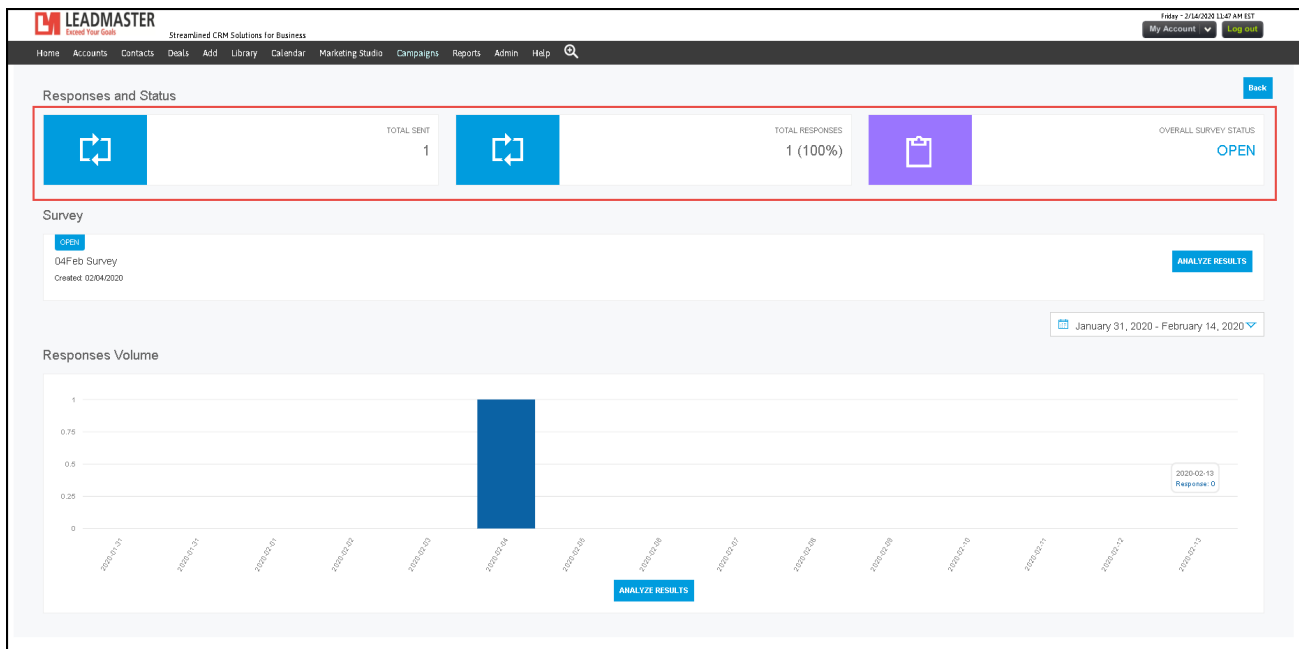
- **Survey Details** section – gives you the Status, Name of the Survey Campaign, Date it was created and the Analyze button (35) that you can click for drill-down results.

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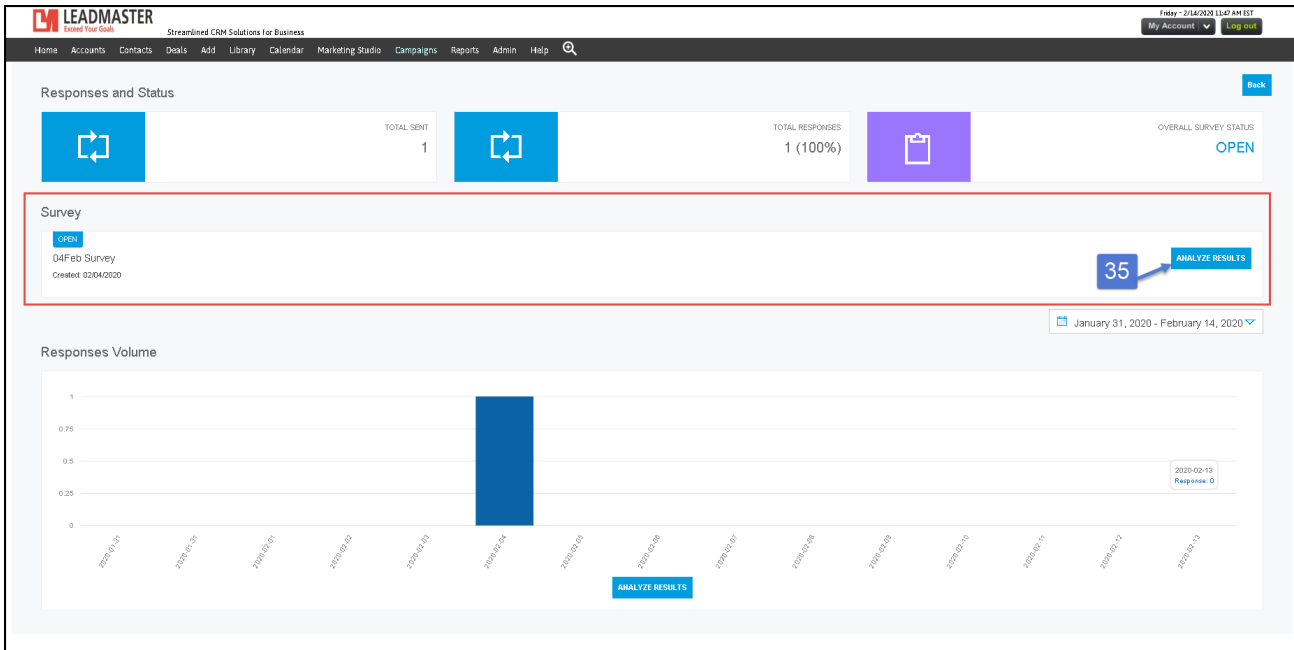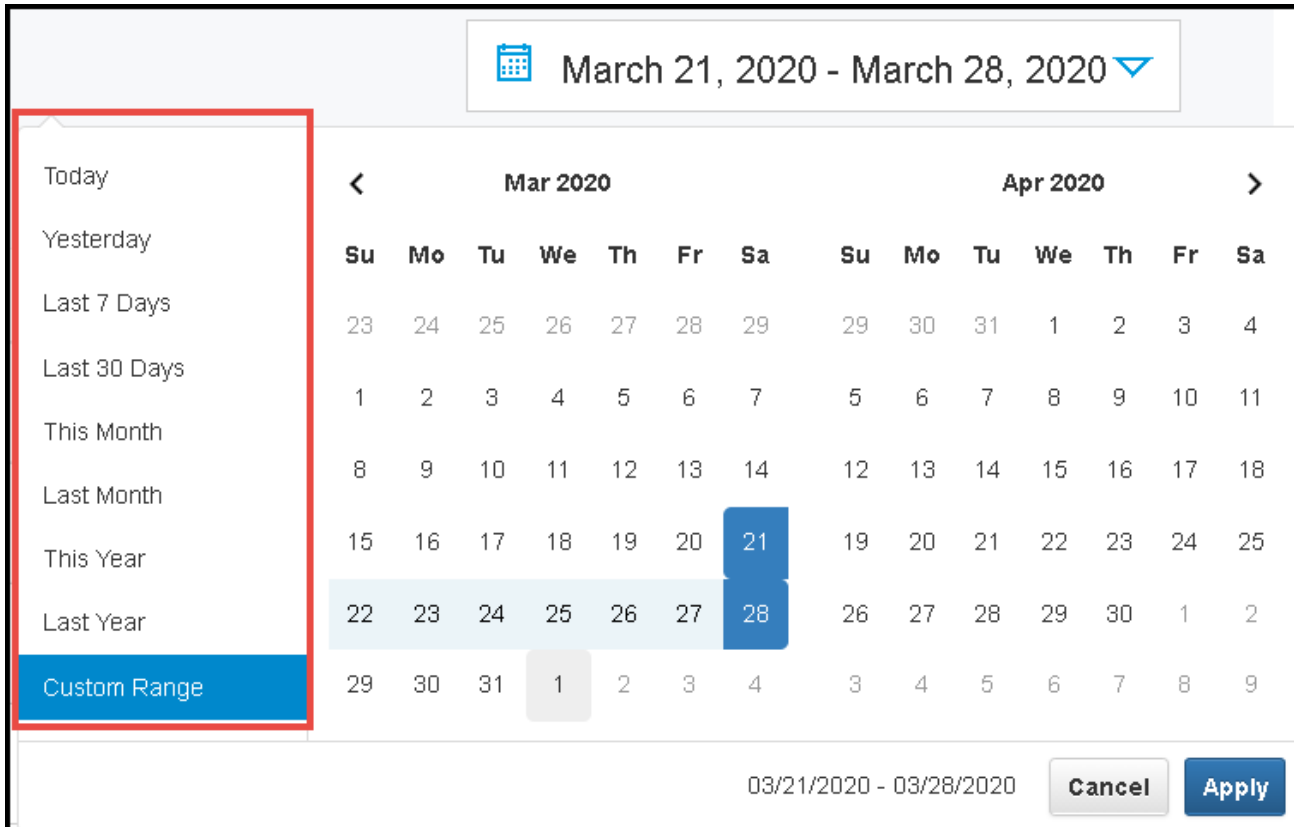
- **Responses Volume** section – displays the number of responses submitted on a given timeline. This is displayed in a vertical Bar graph type representation. In this section, Analyze Results (35) can be clicked to get the details of the Survey
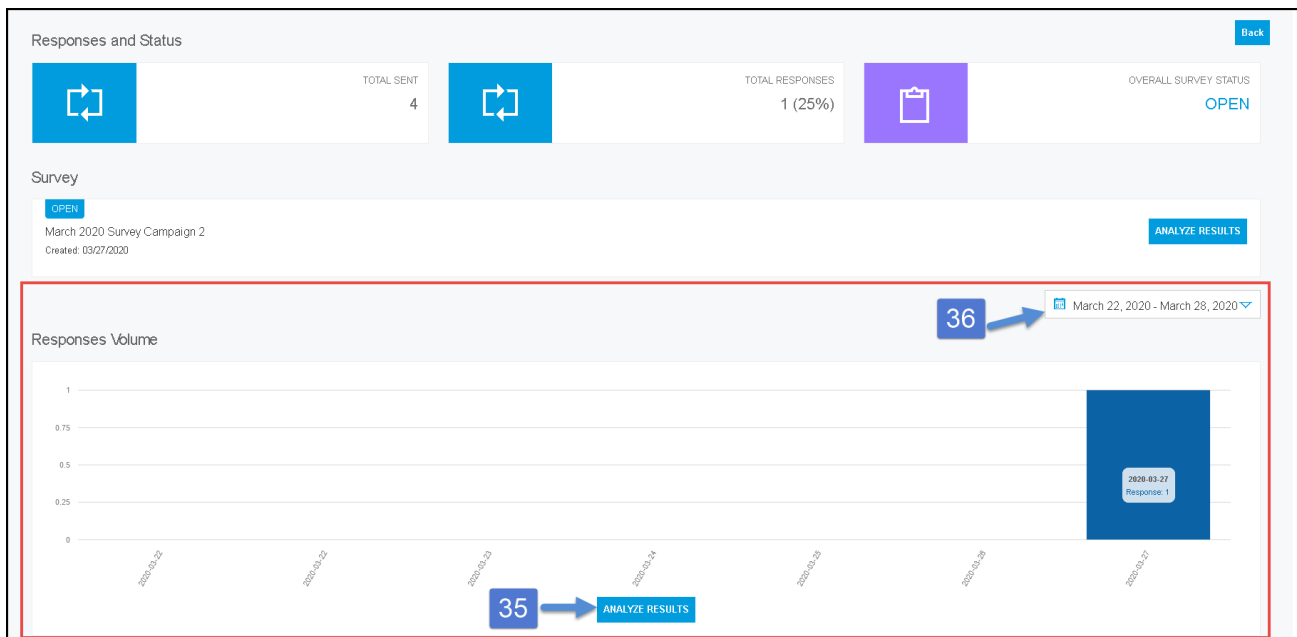
and Date selection (36) allows you to choose the timelines of when the Surveys have been submitted. When selecting 'Custom Range', left click first the start date of your timeline (no need to hold the left click) , then left click again the end date of your timeline. Click Apply when done.

- **Analyze Results** (35)when clicked, shows you the Question Summaries and Individual Responses separated by each tab.

  In **Question Summaries tab**, each section represents each questions set in the Survey Form. You will see the summary of respons es per each item or question.

  In this example below, there are 50 recipients, 49 has responded to the survey, only the last 5 responses will be displayed. If there are more than 5 responses, you need to click on the link encircled in green to display all responses on that question.

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Responses and Status

QUESTION SUMMARIES   INDIVIDUAL RESPONSES

Q1:- Text

Answered: 49   Skipped: 1

RESPONSES (5)

Showing 5 responses. Click Here to view complete list of responses.

Test 100

11/26/2019 05:18:20 AM

Test 99

11/26/2019 05:16:33 AM

Test 98

11/26/2019 05:14:20 AM

Test 97

11/26/2019 05:12:02 AM

Test 96

11/26/2019 05:10:16 AM

Q2:- Monthly Salary Income

Text   ×

FirstName	LastName	Response	DateModified
Test 100		Test 100	11/26/2019 05:18:20 AM
Test 99		Test 99	11/26/2019 05:16:33 AM
Test 98		Test 98	11/26/2019 05:14:20 AM
Test 97		Test 97	11/26/2019 05:12:02 AM
Test 96		Test 96	11/26/2019 05:10:16 AM
Test 95		Test 95	11/26/2019 05:07:53 AM
Test 94		Test 94	11/26/2019 05:05:40 AM
Test 92		Test 92	11/26/2019 05:01:50 AM
Test 91		Test 91	11/26/2019 04:59:49 AM
Test 90		Test 90	11/26/2019 04:57:47 AM
Test 89		Test 89	11/26/2019 04:52:54 AM
Test 88		Test 88	11/26/2019 04:50:24 AM
Test 87		Test 87	11/26/2019 04:48:35 AM
Test 86		Test 86	11/26/2019 04:44:52 AM
Test 85		Test 85	11/26/2019 04:42:59 AM
Test 84		Test 84	11/26/2019 04:40:15 AM
Test 83		Test 83	11/26/2019 04:37:29 AM
Test 82		Test 82	11/26/2019 04:34:33 AM
Test 81		Test 81	11/26/2019 04:31:51 AM
Test 80		Test 80	11/26/2019 04:29:47 AM
Test 79		Test 79	11/26/2019 03:38:00 AM
Test 78		Test 78	11/26/2019 03:33:32 AM
Test 77		Test 77	11/26/2019 03:28:50 AM
Test 76		Test 76	11/26/2019 03:26:14 AM
Test 75		Test 75	11/26/2019 03:14:35 AM

1   »   »»

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The responses include the Answer, the Date and time it was submitted, and the First, Last name of the contact who responded.

Another sample of Question summary below, this question is set as type: Radio - in the Survey Form, and it displays data in horizontal bar graph representation.
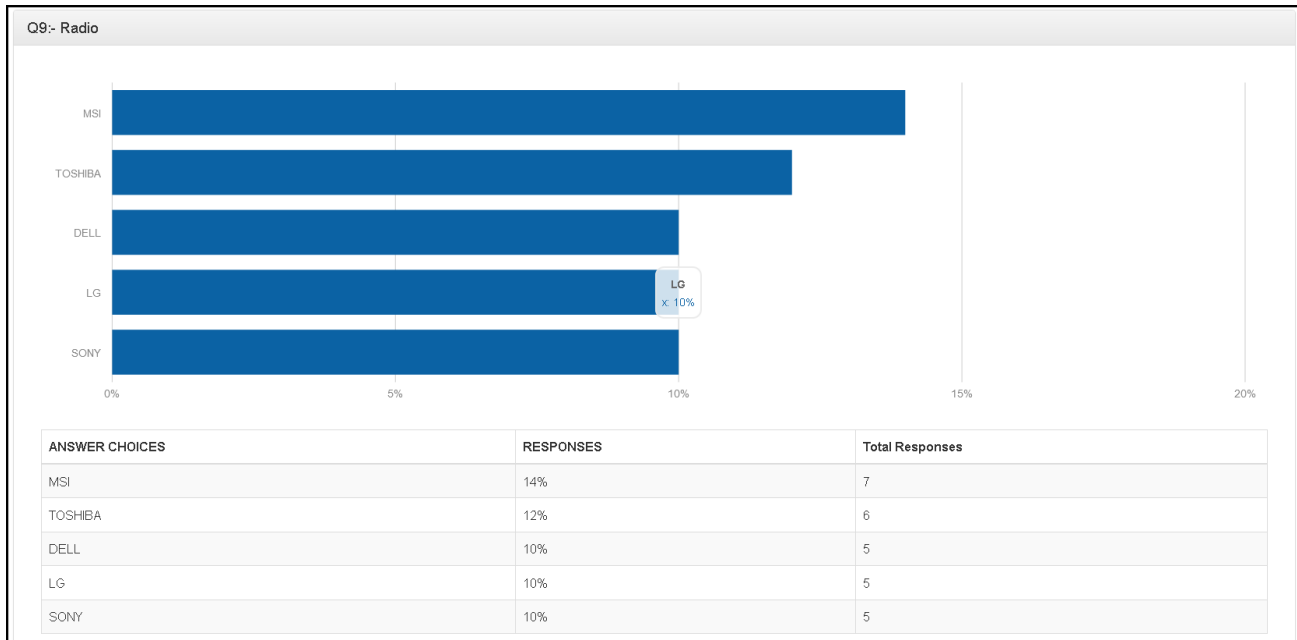
There are 5 options the respondent can select, but since this is a Radio type of question, a respondent can only select one.

In this example, 14% of the respondents has selected 'MSI' with a total response of 7 individuals; 12% chose 'Toshiba' represented by 6 individuals; 10% or 5 individuals selected 'DELL' and so on.

The Question summary are displayed inText representation for the following Types of question set in the Survey form:

- Text
- Numeric
- Date
- Currency
- Text Area

- Summed

Question summaries are displayed in Bar Graph representation for the following Types of question set in the Survey Form:

- Radio
- Checkbox
- Single Select
- Multiple Select
- Rate this Survey

In **Individual Responses** tab, you will see the details of each respondent per row: Name, Company, Date and Time response was submitted and the IP address used when submitted the response.

Responses and Status				Back to Dashboard
QUESTION SUMMARIES	INDIVIDUAL RESPONSES			
Contact	**Company**	**Last Modified**	**IP Address**	
Test 51	R CASE 3171.51	11/26/2019 02:01:42 AM	110.54.160.85	Preview
Test 52	R CASE 3171.52	11/26/2019 02:04:03 AM	110.54.160.85	Preview
Test 53	R CASE 3171.53	11/26/2019 02:06:11 AM	110.54.160.85	Preview
Test 54	R CASE 3171.54	11/26/2019 02:09:21 AM	110.54.160.85	Preview
Test 55	R CASE 3171.55	11/26/2019 02:11:36 AM	110.54.160.85	Preview
Test 56	R CASE 3171.56	11/26/2019 02:14:55 AM	110.54.160.85	Preview
Test 57	R CASE 3171.57	11/26/2019 02:16:43 AM	110.54.160.85	Preview

The **Preview** button at the right displays all the actual answers per individual for all the questions set in the Survey Form.

This includes when was the form submitted and the IP address.

For questions left blank by the respondent, the question will still be displayed, however, with a blank or no data in it.

QUESTION SUMMARIES   INDIVIDUAL RESPONSES

‹ Back

COMPLETE
Last Modified: 11/26/2019 02:01:42 AM
IP Address: 110.54.160.85

Q1

Text

Test 51

Q2

Monthly Salary Income

342

Q13

Summed

410

Q14

Rate this Survey

Question	Response
1 Deals effectively with pressure and stress	Dissatisfied
2 Provides frank open and accurate feedback while avoiding destructive comments	Dissatisfied
3 Creates a work environment that encourages creative thinking and innovation	Dissatisfied
4 Does not take conflict personally accepts conflict as part of business	Neutral
5 Flexible and open to new ideas and encourages others to value change	Neutral
6 Practices timely proactive communication	Neutral
7 Can effectively handle several challenging problems or tasks at once	Satisfied
8 Asks the right questions to size up or evaluate situations	Satisfied
9 Keeps supervisor informed of progress issues and potential problems	Highly Satisfied
10 Works to eliminate unnecessary work or barriers that get in others way	Highly Satisfied

Back to Dashboard

When done reviewing the details, click on 'Back to Dashboard' button, it should route you back to the Survey Report page.
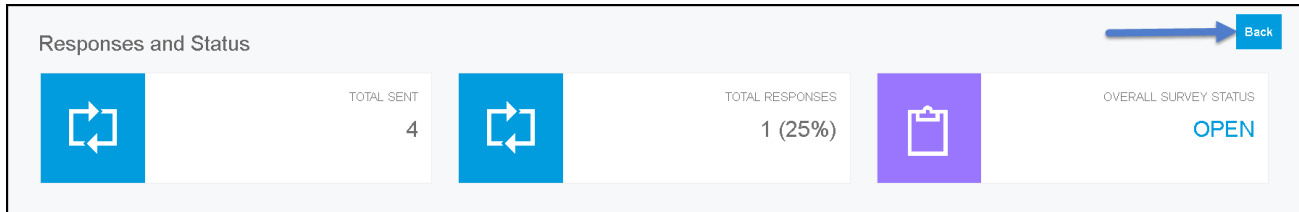

Responses and Status   Back to Dashboard

QUESTION SUMMARIES   INDIVIDUAL RESPONSES

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In the Survey Report page, clic k'Back' to go back to the list of Survey Campaigns.

Responses and Status

	TOTAL SENT
	4

	TOTAL RESPONSES
	1 (25%)

	OVERALL SURVEY STATUS
	OPEN

Back

If you have any questions or need assistance on the Survey Campaigns feature, please send an email to Support@leadmaster.com.