

Designing a Survey

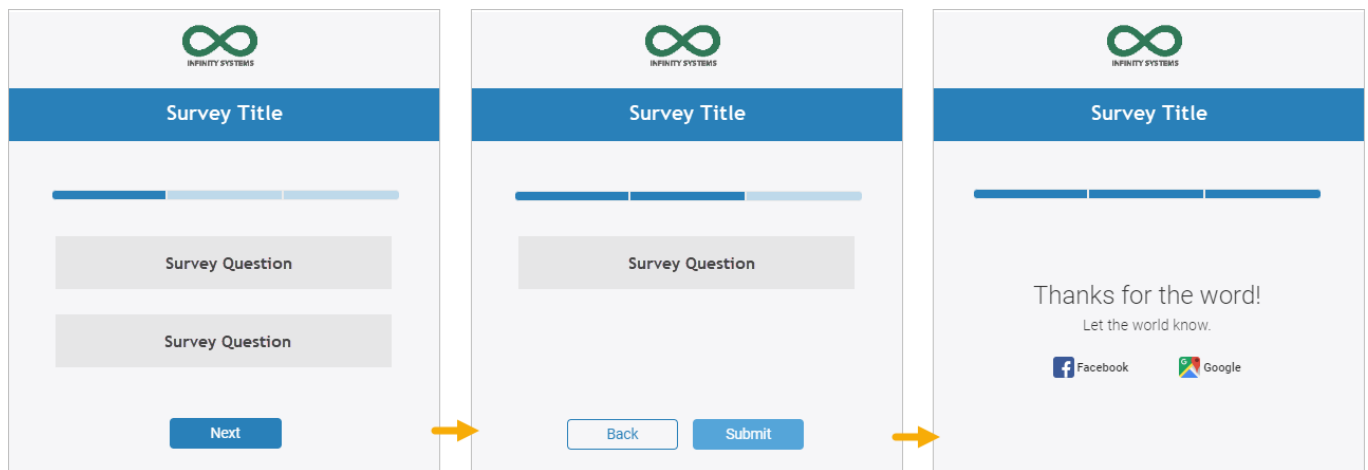
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Surveys should remain concise and should always have your goal in mind. If you have multiple goals, consider creating multiple surveys.






The survey builder allows you to specify the styling, pages, and questions that make up a survey. You can also specify pathing, conditional visibility, and page jumps; configure custom scoring; and specify which questions to use for overall rating, NPS, and comments. Although your Customer Success Manager can assist you with this process, the survey builder gives you the tools you need to perform much of the design yourself!

New Surveys

A new survey includes one page (that contains at least one question) and a thank you page (customizable). You can remove those items or add additional questions/pages, turn on/off progress bar, edit the heading, customize the logo, modify other design elements, and set advanced properties and pathing and visibility.



To create a new survey:

1. From the Menu Bar, click **Surveys > All Surveys**.
2. Click **Create a Survey**.
3. Click **Regular Survey > Create**.
See Conversational Survey for additional options.
4. Edit survey color scheme and properties.  | 
5. Edit survey title. 
6. Add questions  and/or pages . See below for **question types**.
7. Edit question properties. (Hover over question and click). See below for **pathing** and **visibility**.
8. Move pages/questions around or modify type as needed.

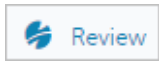
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9.

Specify which question(s) measure overall rating, NPS, and/or comments.



10.

Preview changes.

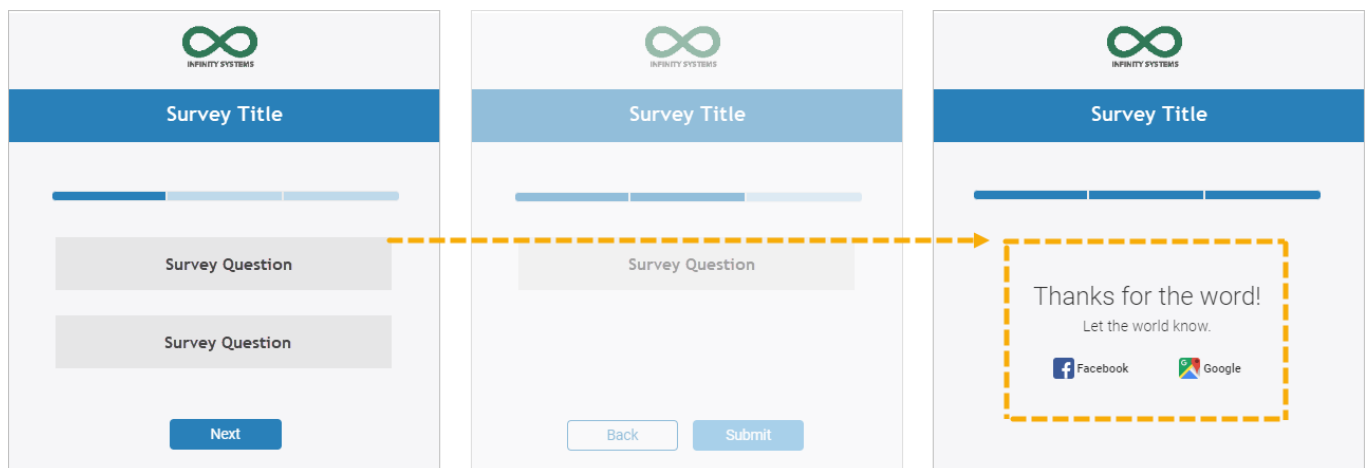


Changes are saved as you work. Rely on your CSM for custom scoring (if needed) and Request properties.

Survey Pathing and Visibility

Survey pathing and conditional visibility gives you incredible flexibility for creating survey experiences based on conditions. You can apply pathing and visibility to individual questions in the survey or at the page level.

By default, questions and pages within the survey are displayed in the order they're listed. Pathing allows you to jump to other sections of the survey. After a jump the survey continues to flow in the order listed unless conditional visibility or additional pathing is applied to the landing point.



Property	Description	Example
Pathing 	Determine where to go based on response.	<i>If answer is ___ send ___ of respondents to page ___ question ___.</i>
Visibility 	Determine whether to show/hide the question based on conditions (scripting variables). Can also set visibility based on static preference. "Hidden" is often used to pass concealed respondent data into the results, such as name and email.	<i>Hide this question if values for question ___ > ___ OR question ___ < ___.</i>

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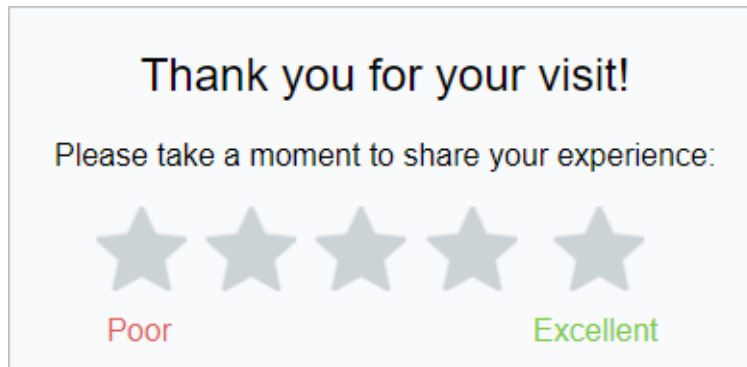
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In order to apply pathing at the page level, no questions within the page can have pathing applied.

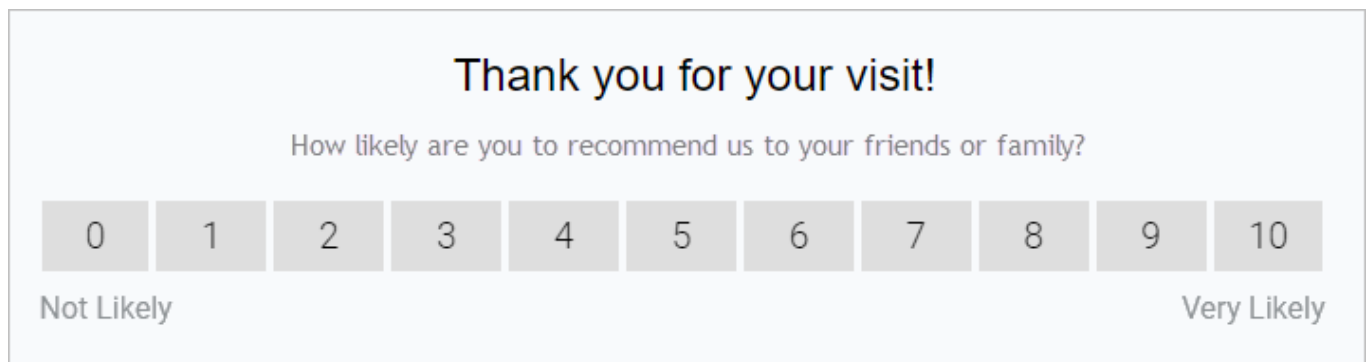
The most common pathing technique is to initiate an overall positive or negative flow from within the custom request template. Work with your Customer Success Manager (CSM) to embed the initial pathing question directly in the email request.

Alternatively, you can add the initial pathing question in the survey. Either way, it's recommended to use the Star Rating or NPS question types if your goal is to invoke an initial positive/negative flow.

Star Rating



Net Promoter Score (NPS)



Scripting Variables

When you set visibility to "Conditionally Hidden" or "Conditionally Shown," you must specify the condition in the form of an expression, which must contain a minimum of:

Variable

Variables are code references to questions. Click the Open Scripting Variables and Values button to locate the variable you want to use.

Operator

Operators define the logical notation to use, such as **> < = OR AND NOT CONTAINS**. Enclose strings inside single quotation marks.

Value

Value refers to the input for the selected variable.

Example (one expression): `sq4 < 4`








Example (multiple expressions): `sq21 CONTAINS 'sq21_o22' AND sq4 < 4`

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Question Types

You can design surveys with the following question types:

Type	Example	Available Properties
NPS		Question text Subtext Required Pathing Conditional Visibility Advanced Properties
Rating		Question text Subtext Required Pathing Conditional Visibility Advanced Properties
Select One		Question text Required "Other" option Pathing Conditional Visibility Enable Images (Vertical, Scale, Horizontal)
Select Many		Question text Required "Other" option Pathing Conditional Visibility Enable Images (Vertical, Scale, Horizontal)
Date		Question text Required Conditional Visibility
Dropdown		Question text Required "Other" option Pathing Conditional Visibility
Select One Grid		Question text Required "Other" option Pathing Conditional Visibility

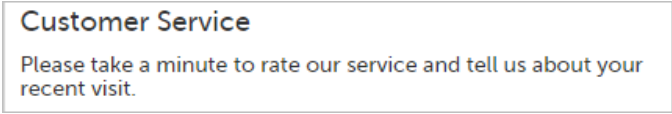
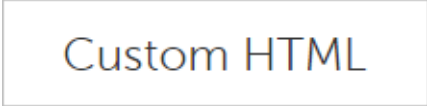
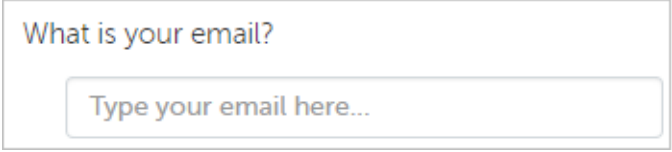
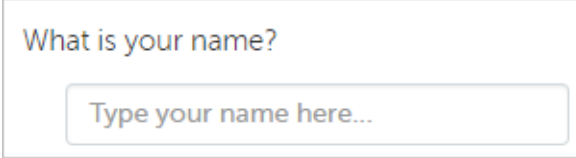
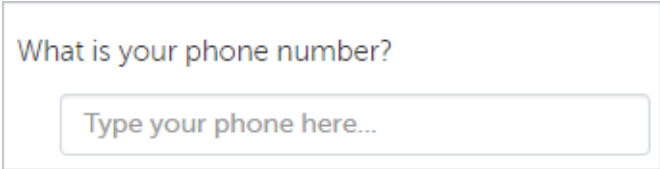
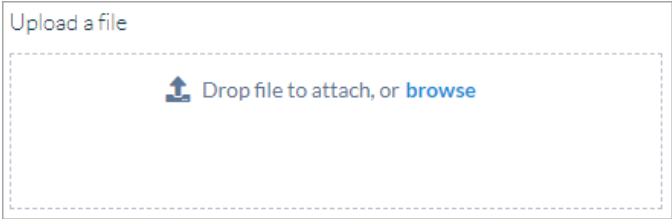
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Type	Example	Available Properties																				
Select Many Grid	<p>Please state your opinion on the scale below.</p> <p>Select one or more per row.</p> <table border="1"> <thead> <tr> <th></th> <th>Breakfast</th> <th>Lunch</th> <th>Dinner</th> <th>Snack</th> </tr> </thead> <tbody> <tr> <td>Apple</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Banana</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>Orange</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </tbody> </table>		Breakfast	Lunch	Dinner	Snack	Apple	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Banana	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Orange	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<ul style="list-style-type: none"> Question text Required "Other" option Pathing Conditional Visibility
	Breakfast	Lunch	Dinner	Snack																		
Apple	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																		
Banana	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																		
Orange	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																		
Comment	<p>Please tell us about your experience.</p> <div style="border: 1px solid #ccc; padding: 5px; width: fit-content;"> <p>Type your comments here...</p> </div>	<ul style="list-style-type: none"> Question text Subtext Hint Required Response box lines Validate answer PII Field Conditional Visibility 																				
Terms of Service	<div style="border: 1px solid #ccc; padding: 5px; width: fit-content;"> <input type="checkbox"/> I agree to the Terms of Service </div>	<ul style="list-style-type: none"> Agreement text Required Conditional Visibility 																				
Heading	<div style="border: 1px solid #ccc; padding: 10px; text-align: center;"> <h2>We want to hear about your experience!</h2> <p>Please take a minute to rate our service and tell us about your recent visit.</p> </div>	<ul style="list-style-type: none"> Heading text Subtext Conditional Visibility 																				
Image		<ul style="list-style-type: none"> URL or Upload 																				

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Type	Example	Available Properties
Label		Label text Subtext Conditional Visibility
HTML		HTML Conditional Visibility
Respondent Email*		Question text Subtext Hint Required Validate answer Conditional Visibility
Respondent Name*		Question text Subtext Hint Required Validate answer Conditional Visibility
Respondent Phone*		Question text Subtext Hint Required Validate answer Conditional Visibility
File Upload		Required Validate Answer PII Field

*These questions are often inserted as "Hidden" (Conditional Visibility = Hidden) in order to pass concealed respondent data into the results.