



•EMMA'S•

**GUIDE** to  
**SURVEYS**

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You can create, publish and track interactive surveys & forms to learn more about your subscribers. Here you'll learn how to create and style a new survey. You'll also learn how to publish your survey, then see who's taken it and how they responded.

## • Getting Started

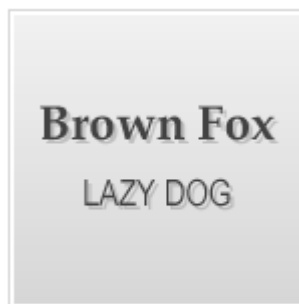
- ➔ From the main campaigns screen, scroll to Your Surveys and click **Create a New Survey**.
- ➔ This will open a blank survey. Give it a **Survey Name** (for internal reference) and a **Survey Page Title** (what your recipients will see).
- ➔ The **Stationery** is the template that frames your content. Surveys are compatible with your brand stationery or the Blank Template Stationery.

| About this Survey |  |   |
|-------------------|--|---|
| Survey Name       | <input type="text" value="Customer Experience Survey"/>                                      | A reference so you can find this survey again later.            |
| Survey Page Title | <input type="text" value="Your Customer Experience"/>  | This is what people will see for the page title of your survey. |
| Use Stationery    | <input type="text" value="Blank Template Stationery"/> <input type="button" value="Change"/> | Choose the look of your survey.                                 |
| Set Style         | <input type="text" value="Modern 1"/> <input type="button" value="Change"/>                  | Select a style for your survey.                                 |

- ➔ The **Style** is a collection of preset fonts and sizes designed to format your survey's headlines, questions and answers in one consistent theme. Choose from modern, classic or boutique styles.



Modern 1



Classic 3



Boutique 5

## • Adding and editing content

- ➔ To edit the intro note at the top of the survey, click the **Please take our survey** text and make whatever changes you'd like. Use the formatting toolbar to change the text's appearance.





- ➔ To add content to your survey, visit the **Add form elements** sidebar on the right. Click and drag question types to build your survey.

### Add form elements

click/drag to add

- Short Answer**  
for brief text responses
- Long Answer**  
for expanded comments
- Checkbox Menu**  
for selecting one or more
- Radio Button Menu**  
for selecting just one
- Drop Down Menu**  
for selecting just one
- General Note**  
of information or help

- ➔ Once you've added a form element, type your survey question where you see **Input your text here**.

Input your text here  required done

Option text  done

add option include other option

copy delete

- ➔ Add options to checkbox, radio button and drop down menu questions by typing your options where you see **Option text**. You can make the question required by checking the **required box**. (A red asterisk (\*) will appear beside questions you designate as required.)
- ➔ Click **done** to the right of the option and **add option** to add another. You can also select **include other option** to add or create a write-in field for survey-takers.





- ➔ You can add up to 50 questions and 50 options per question. The **General Note** form element allows you to add instructions or notes to survey-takers and isn't included in your 50-question limit.
- ➔ Edit any question's text by clicking on it. You can also drag and drop to reorder questions.
- ➔ After you're done with the Survey Form, click over to the **Thanks Page** tab, where you can customize the message that survey-takers see after they've submitted their survey.

**Your Survey** | Survey Form | **Thanks Page**

Alternate URL  Use a different thank you page from the one below. [Click to use another thank you page.](#)

**Thanks for taking our survey.**

- ➔ Click on the text and style it using the toolbar at the top, then click **Save**.
- ➔ If you'd like survey-takers to go to a different page after submitting a survey – such as your website – just click the box next to 'Use a different thank you page from the one below' and enter an alternate URL.

## Need ideas for putting surveys to work?

- + Send a customer service evaluation form
- + Create a product review
- + Publish a product sampling survey
- + Create an event registration form
- + Follow up with a post-event questionnaire
- + Send an evaluation form for an online class
- + Create an opinion poll
- + Conduct a market research survey
- + Discover new segments of your audience
- + Send an employee satisfaction survey
- + Create a company suggestion form
- + Publish a quick staff-wide poll

**Ready to publish your survey? Let's continue, shall we?**





## • Previewing & publishing your survey

- ➔ Click the **Preview** tab to see how your survey will appear. Then, click the **Publish** tab to set the survey's end-date details. Your survey can end now, never, on a particular date or after a certain number of people have completed it. Next, click the **Publish Survey** button (don't worry, it won't be sent out yet).

**When should your survey end?**

Now

Never

On this date

After  people have completed it

- ➔ You have a few options for promoting your survey:

- 1. Direct people to it using a link.** Use this URL to post the survey on your website, blog or anywhere you'd normally share a URL. These survey-takers will be anonymous in your survey's response section.
- 2. Create an email invitation.** With a quick email invitation, you can invite any group(s) of current audience members to take your survey. By clicking this button, a pre-filled campaign will open. Add your unique style and tone, and send it like you would any other email campaign. These survey-takers will be tracked by email address in your survey's response section.
- 3. Link to this survey from your next email campaign.** If you'd rather link this survey in a campaign that's already created or in a future campaign, you'll create a link in the campaign much like you'd create a link to a webpage, email address or document. Edit the campaign and click on the chain link button in the toolbar, then choose the **\*Survey\*** tab to select the survey to which you want to link.

**When should your survey end?**

Now

Never

On this date

After  people have completed it

**Your survey is ready to be promoted.**

- 1. Direct people to it using this link:**  
<https://app.e2ma.net/app2/survey/28978/205022789/3ec1bf0f2f/>
- 2. Create an email invitation**  

An email pre-filled with this survey link will open for your editing and send-off.
- 3. Link to this survey from your next email campaign.**  
You'll link to this survey just like you would a Web page, email address or file.





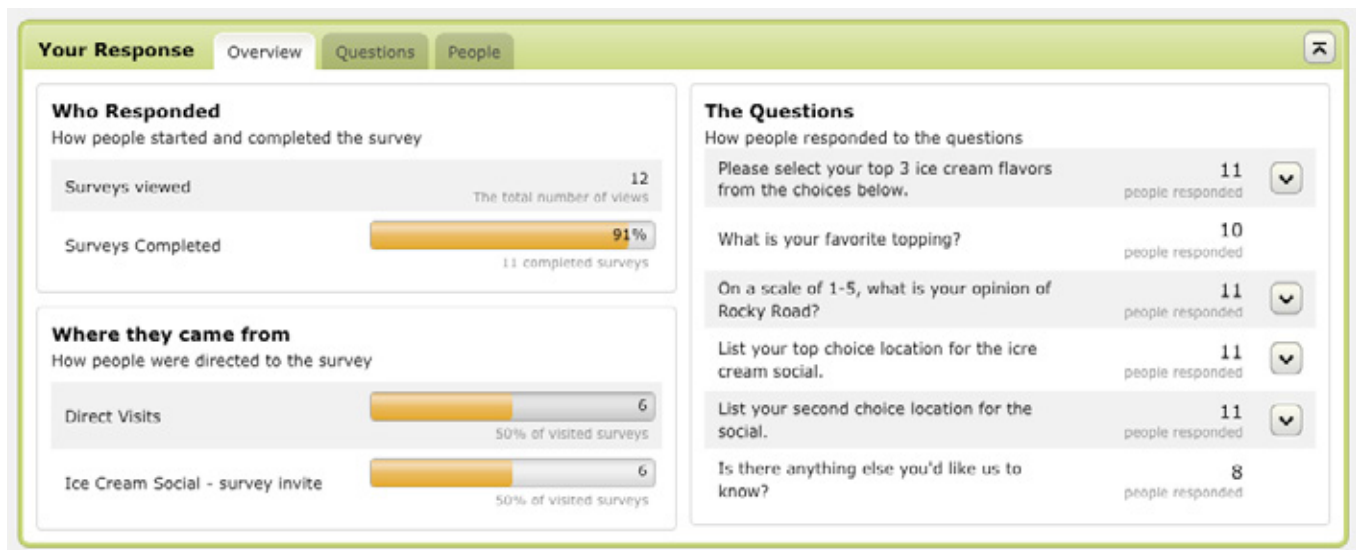
## • Reading your survey's response

➔ From the main response page, you can check out your survey's response under your list of mailing responses. Click the survey's name to find out:

+ **Who responded.** You can see how many people viewed your survey and how many completed it. Click on the numbers to see all the juicy details.

2. **Where they came from.** The **Direct Visits** category gives the number who responded from a public link (anonymous survey-takers). The **Mailings** category tells you how many responded from a particular campaign.

3. **What they had to say.** Read results under **The Questions** section on the **Overview** tab or by clicking the **Questions** tab. Click the drop down arrow to see a list of responses. (For checkbox, radio button and drop down menu questions, you'll also see a bar graph to visually represent responses.) Click the **People** tab to view individual responses and how they compare to the rest of the audience.



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**And there you have it!**

**You've learned how to create, publish and review your survey results.**

**Happy surveying!**

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