SurveyMonkey Tutorial

This training document was created to help EvalFest partners who opted to participate in our follow up survey data collection which is administered through SurveyMonkey. This tutorial can be adapted for your individual organizational needs to provide instructions on using SurveyMonkey to collect data.

This document consists of three sections.

- The first section includes information on setting up your contact list database, or manually entering your email list onto SurveyMonkey.
- The second section includes how to set up your email collector in SurveyMonkey and how to import the contact list database you set up in section one.
- The third section includes information on how send your initial email invitation to your contact list, and how to set up the reminder emails. We have also provided the reminder schedule you should use.

PART I: Setting up your contact list database:

SurveyMonkey will allow you to import contact lists so that you can send out individual and personalized email lists. If you have email addresses, and first names or last names for your participants, then please follow the steps below to set up your database. If you have email addresses only then you can skip to Part II of this tutorial.

Step 1. Create a contact list database.

Open Excel. The figure below shows you the way that your database will need to be set up for SurveyMonkey to import the key information you will need. You will need to assign a single row to each participant, such that the first column is the participant's email address, the second column is their first name, and the third column is their last name. You must use this order for SurveyMonkey to be able to import these details. **Please note that if your file consists of more than 2,500 contacts, SurveyMonkey advises you to break the file into multiple files.**

	A	B	C
1	example@test.com	Joe	Smith
2	example2@test.com	Jane	Smith
3	example3@test.com	Michael	Smith
4	example4@test.com	Luna	Smith
5	example5@test.com	Caroline	Smith
6			
7			
8			

Step 2. Save database as a CSV file.

Once you have added all of your participants into the file, go to the home page in excel and select "file" then "save as". It will give you an option to change the file format before saving. Change your file format from an excel file to a CSV file using the drop down list. Once you have changed it to a CSV file, press save.

Step 3. Move onto Part II.

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Open your web browser and sign into your SurveyMonkey account before moving onto Part II.

PART II: Creating your email collector and Importing email list into Survey Monkey:

You should now working in SurveyMonkey on your web browser. If you are using a CSV file, you will import it into SurveyMonkey using the steps below.
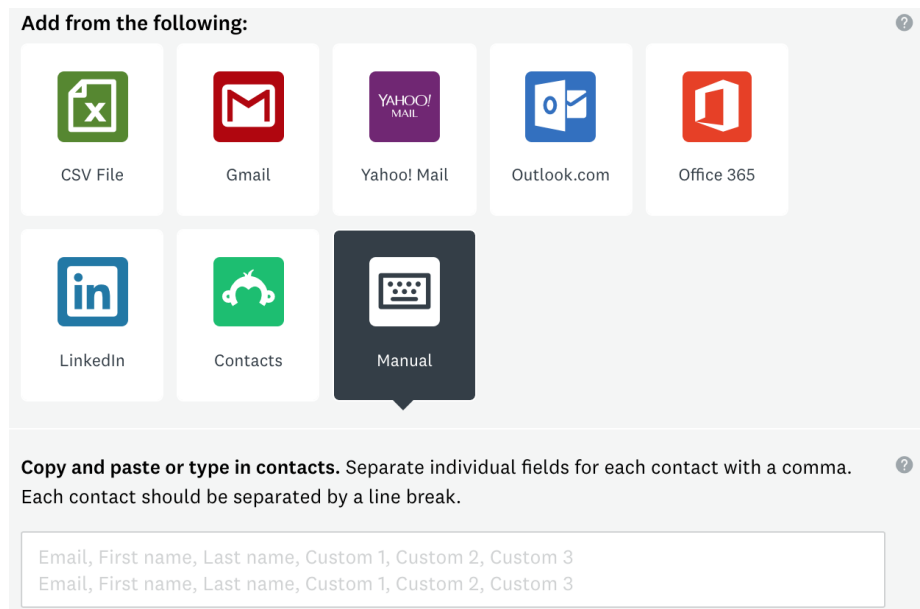
Step 1. Adding your participant list to SurveyMonkey.

- To do this, you will need to open the survey from your survey list and then select the "Collect Responses" tab at the top of the page.
- Once you have selected that tab, it will take you to a menu page with different options to share your survey. You will then select the "Send by Email" option, and it will take you to the email collector page. Here is a screenshot of what the email collector page will look like:

- As you can see in the screenshot above, there is a "Add Recipients" button. Select this option instead of manually typing in your emails.
- Once selected, a pop-up menu will appear with several different options for how to import your contact list (see image below). For our purposes, you will either (1) import a CSV file or (2) manually enter your contacts.
- If your contact list is in a CSV file (as set up in Part I of this tutorial), you will click on the "CSV file" from the pop-up menu. Use the prompt to browse for your CSV file and then click the upload button your file. Once you have uploaded your CSV file, you can name your contact group before selecting the green "Add" button in the bottom right hand corner of the pop-up menu. You have now successfully uploaded a group of participant emails! If you have more than one contact list, use this same process again for the remaining participant emails.

- If you do not have any first or last names attached to your contact list, you can select the "manual option" to import your email list directly. As you can see at the bottom on the screenshot below, there is a small entry box at the bottom of the menu. This box will appear only when you select the manual option. Simply input one email per row, and you can ignore the rest of the prompts for the other info.

Add from the following:

CSV File	Gmail	Yahoo! Mail	Outlook.com	Office 365
LinkedIn	Contacts	Manual		

Copy and paste or type in contacts. Separate individual fields for each contact with a comma. Each contact should be separated by a line break.

Email, First name, Last name, Custom 1, Custom 2, Custom 3
Email, First name, Last name, Custom 1, Custom 2, Custom 3

(Content continues on next page.)

Step 2: Creating your email collectors

- Now that you have your participant list, it is time to edit the email message that SurveyMonkey will send to each person. First, you will change the Subject to something descriptive that will get potential participants' attention. You can type the new subject directly in the box or cut and paste it in from a Word document. Your email collector box should look like this:

- Now you are ready to edit the email message. Select the "Edit Message" button that appears on the righthand side of the screen. This will take you to the email editing page that gives you several options for how you would like your email to appear. Select the "Plain Text" option (on the righthand side). A warning will appear about opened rates can't be tracked for plain text, and that is fine. Just ignore that piece.
- Look down to the body of the email and you will see a generic message that SurveyMonkey has created. Delete everything but the "Opt out" text, the survey link, and the "footer link" in brackets. Those are required by SurveyMonkey to stay in the email.

- Now that you have deleted out SurveyMonkey's generic email, you can input your own text. You can adapt the language below to meet your organizational needs:

  "Greetings from the [org name]. We are emailing today to ask that you complete the survey below to help us learn more about the things you like to do in your free time. We hope to use this information to create new experiences for community members like you!

  The survey should take [less than 20 minutes] to complete. In exchange for your time and effort, your name will be entered into a drawing to receive one of [# of prizes here] prizes that include [full list of prizes here].

  Thank you, in advance, for your time and effort.
  [Name and affiliation here]"

You now have your email contacts and have replaced the generic language... you are almost done!

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If you uploaded your emails with first names, this next step is for you. If you did not upload your emails with first names attached, you can skip ahead to Part III of the instructions.

- Ensure your cursor is on the top line to the very left-hand side of the "body" editing box. With your cursor at the beginning of the email, select the "Insert Custom Data" button. From the menu options that appear, select the one that says "First Name." You will see [First Name] appear at the beginning of the email. This will input each first name that you uploaded with their corresponding email.
- ***Note: if you select [First Name] and it doesn't appear at the beginning of the "body" editing box, simply copy and paste the [First Name] and enter it to the beginning of the email editor.** Select "save" at the bottom of the email body pane to ensure the format is locked in! Your email should look similar to the screenshot below:

(Content continues on next page.)

PART III: Setting up your email collector schedule including reminders:

This section will guide you through the process you need to use to set up to schedule your initial email invitations, and all three reminders. EvalFest sends out the initial invitation and three reminders to participants, across a two-week timeframe; these instructions detail this process but can be adapted to any timeline you choose. Remember if you are collecting from multiple sites, you want the process to be consistent.

For this timeline, the initial invitation will go out at 7am on a Monday (one month after your event ends). A reminder will go out on Thursday of that week and Monday of the next week. We will also have you send a "last day" reminder on the second Friday of your data collection period. This tutorial walks you through how to schedule all of the reminders before you start collecting data so that you can program it and then just sit back and watch your data roll in!

Step 1: Scheduling your initial email invitation.

- Once you have finished editing your email and have saved it, select the "Next" button at the bottom of the page. You will be taken to an option page, with a list of options to change. We want to keep all default settings the same, so simply ignore this page and select the "Next" button located at the bottom of the page. This will take you to the final page before sending the emails, so be sure to look over this page closely before sending. There will be an option to "Send Now" or "Schedule a later date and time to send." Choose "Schedule a later date and time to send."
- Once you select that option, a date and hour time frame will appear, and you can choose the date and time of day you would like the invitation sent to your contact list. For this survey, we're going to want all surveys to send on a Monday morning and at 7am EST (the time zone SurveyMonkey uses will appear to the right-hand side of the hour option).
- Now that you have finished editing your email collector as well as setting the email schedule for SurveyMonkey to follow. It will say "Done" if you scheduled the message to send at a later date.
- Once you select the final "Done" button- you will be taken to a page that displays how many invitations you've sent, when they were sent, and how many people have opened the email, and/ or how many emails "bounced back." See screenshot on next page for an example. If you have a ton of bounce backs, your email uploads may be incorrect. Double check to ensure everything is formatted correctly.

Step 2: Scheduling your three reminders.

- Now that you have set up your initial email invitations, you can now set up your reminder emails to send to those that do not respond on our first go-round. The page you are currently on should look something like this:
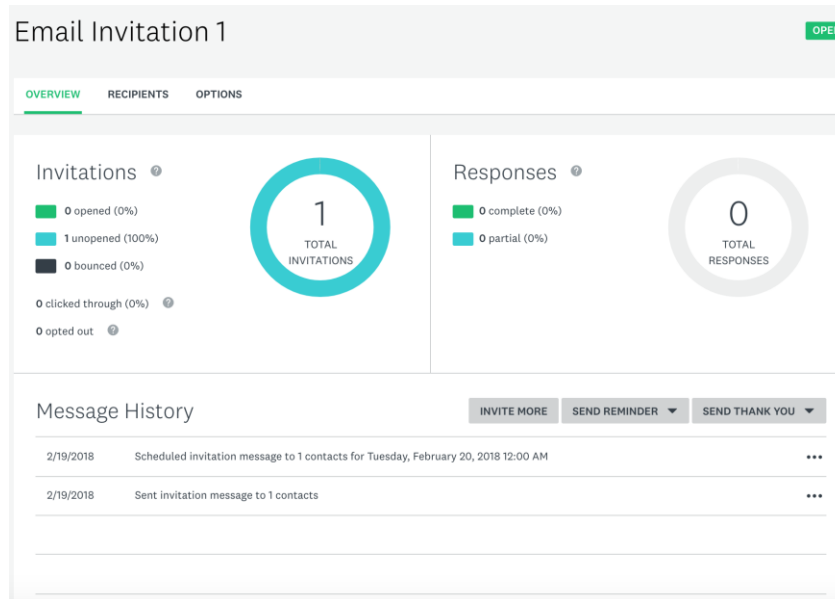
- Select the "Send Reminder" button and select the "Remind Not Responded" option. This will take you to another email editing page, exactly like we completed for the initial invitation email in Step 1 above.
- Edit the email using the same language as before and including their first name (if applicable), making sure to select the plain text option for the format of the email.
- Change to the subject line, adding "Reminder" to the beginning of the subject.
- Once you have edited your Subject and Message, select the "Next" button in the bottom right hand corner of the page and you will select to send the email at a later date and time.
- Schedule your reminder to go out on Thursday of the first week of your data collection at 7am.
- Repeat the process in Step 2 to create a second reminder for the following Monday.
- Repeat the process one last time to create a final reminder for the following Friday. Change the Subject to read: Last Chance - Help [your org name] learn about things you like to do – Win prizes!!.
- Once you have finished setting up your initial email and your reminders, select the "Collect Responses" tab again to see your email collectors organized by date.

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- Once on this page, you can see whether your email invitations are "open" and collecting data, or whether your email invitations are "not configured." If any appear as "not configured"- go back in and see if you didn't click all the way through to the send page, or to look for other issues. On this page you can also select the symbol that looks like this "…" from the right-hand side of the page, and rename your email collectors. It is useful to rename your collectors by their send date.
- **Note that your reminder email collectors "live" under your initial email invitation, and so they will not appear on this page. You have to open the initial email invitation/collector to see the reminders scheduled.**

After doing a final check to make sure your email collectors are configured with the correct language, you are finished! If you notice that you have contacts you forgot to include in the email collector **before the initial email is sent**, you can open the collector and edit the contacts to add more to your list.