SurveyMonkey 102: How to Create Surveys with Advanced SurveyMonkey Functions

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I. SETTING UP YOUR SURVEY

1. Log-in to your SurveyMonkey account and create the following practice survey:
   - MULTIPLE CHOICE: *Overall, how satisfied where you with xyz?*
     Very satisfied, Satisfied, Neither satisfied nor dissatisfied, Dissatisfied, Very dissatisfied
   - COMMENT BOX: *Please comment on your selected response*.
   - CHECKBOXES: *How did you first hear about xyz?*
     Website, Flyer, Word-of-mouth, Radio, Television

   Please include a Page Break from the Builder between each question.

II. ADDING SKIP-LOGIC FUNCTION

1. Let's assume you only want those respondents answer question #2 that were dissatisfied or very dissatisfied with xyz (question #1). **Click into question #1** and choose **Edit**. Click on **Logic**.
2. **Assign** "Dissatisfied" and "Very Dissatisfied" to P2 (where the comment box question is located) and all others to P3. Now, the comment box will only be visible to a specific group of respondents. With longer surveys, you can also assign respondents to a specific question instead of a page.

Tip: Skip-logic can also be used to disqualify certain respondents who do not meet your respondent criteria by re-directing them to the survey end page. Generally, skip-logic works well with Multiple Choice questions, but not with Checkboxes (the logic will always be based on the first answer given).

III. CUSTOMIZE YOUR SURVEY LAYOUT (THEME/LOGO) WITH ADVANCED FUNCTIONS

1. Click on **Themes** in the command panel (left side) to change the theme of your survey. You can either choose from the standard themes or customize your own theme.
2. Try to include a logo to your survey by going into your **Design Survey** page.
3. Click on **Logo** on the left-hand side of your survey (over the title)
4. **Drag and drop or upload a logo.** If you do not have one on hand, you may want to take a screenshot of your college/UH Manoa logo as an example.
5. After uploading the logo, a **tool box** will appear (left side bar). Make size and position adjustments as needed. Click on **Done**.

IV. DISTRIBUTE YOUR SURVEY VIA SURVEYMONKEY

There are several options on how to send out your survey (e.g., weblink). The next steps show you how to send it via SurveyMonkey (Benefit: (scheduled) reminders to non/partial respondents are possible).

1. After you finished designing your survey, click on **Preview & Score** (top bar) to preview/test it (try out the skip-logic function!). Your answers will not be saved in the preview mode. If everything looks fine, click on **Next** (top-right side).
2. Choose **Send by Email. Add an email** of your survey recipients in the **Send to** box (for today, send it to yourself). In the future, if you have a long list of recipients, you can also upload from, e.g., Excel, Gmail, etc, by clicking on **Add Recipients** (top-right over Send To box).
3. Change the **subject line** of your email invitation (e.g., survey title). Click on **Next**.
4. Now you can further edit your survey. To make your survey anonymous click on **Anonymous Responses** and **On, exclude ALL your respondent information.**
5. If the recipients should see a customized message upon survey completion, click on **Custom Thank You** and **On, show a custom thank you message upon survey completion**. Write your message.
6. If the recipients should see a specific website upon completion (default is SurveyMonkey page), click on **Survey End Page** and **On, show a custom end page upon survey completion**. Include your link.
7. After you made all edits, click on **Next** (lower right-hand side). A summary page of your email invitation and number of recipients will appear.
8. You have the option to either send out your survey now or schedule it for a later date. Let's send it out for now, by choosing **Send now** under the Email Invitation name.
9. To see how the final email looks, click on **Test Email**, **enter your email address**, and Click on **Send Test**. After receiving the test email, review it and make changes if needed.
10. When everything looks good, click on **Send Now** in your email summary page.
11. Your responses should start coming in now. As you are the recipient of your survey in this case, you should have received an email. Please do not answer your survey yet.

Tip: You can have multiple collectors for one survey (e.g., when you want to send your survey to different group of respondents you need to distinguish). To add another collector, go into your survey and the **Collect Responses** page. **Click on Add New Collector** and select the distribution method. Follow the same steps as above. To distinguish your collectors better, you might want to rename them. To rename your collectors, go back into the **Collect Responses** page. Click on the **three dots (…)** next to your collector and choose **Rename collector**. Rename your collectors accordingly.

V. SCHEDULE REMINDERS

12. Imagine you would like to send your respondent (yourself in this case) a survey reminder now (you can also schedule reminders days/weeks in advance). To send a reminder (I recommend 2-3 total), go into the **Summary** page. You will see your active ("Open") email invitation.
13. **Click on your email invitation**. Click on **Send Reminder** (middle of the page).
14. Click on **Remind not responded** (you also have the option to remind those who only partially responded). Review the reminder email and make adjustments to, e.g., the subject. Click on **Next**.
15. We skip the test email for now but I would generally recommend this step in the future. Click on **Send Now** and an email reminder would usually go out in five minutes.
16. As we are short in time, I recommend answering the survey that you sent to yourself now.

Tip: If you have multiple collectors, don't forget to send out reminders for all of them. After your data collection is completed, close your collector(s) so that late answers not interfere with your data analysis. To **close the collector(s)**, go into your survey and the **Collect Response** page. Click on the **three dots (…)** and choose **Close collector**.

VI. AFTER YOUR RESPONSES ARE COLLECTED: ANALYZING A SURVEY

Browsing/customizing data

1. After you finished collecting responses, click on **My Surveys** (header bar) to get to your survey summary page and to see the number of responses collected.
2. Go into your survey and click on **Analyze Results** (top bar). The tool will summarize your data and display results as charts. To can either see the results summarized or as individual responses (click on **Individual Reponses** above the first survey result area).
3. To customize the layout of charts, choose **Customize** (top-right of your chart). Click on **Chart type** or **Colors** to change the chart layout. Click on **Display Options** to include, e.g., **Data in chart** or **Basic statistics** (minimum, maximum, mean, median, standard deviation) in the data table. Click on **Save**.

Filtering/comparing responses

4. Imagine you have more respondents and you would like to filter or compare certain responses (e.g., how did respondents who very dissatisfied answered the survey? How do respondents who very satisfied/dissatisfied compare?). Go into the grey box on your left-hand side (Current View):

- <u>Filtering</u>: Click on **Filter by Question and Answer**, choose question #1 and select the answer that you would like to see filtered. **Click on Apply.**
- <u>Comparing</u>: Click on **Compare** and **Compare by Question and Answer**, choose question #1 and select the desired answer categories. **Click on Apply.**

5. The charts on the right side will show the filtered/compared answer only. To remove a filter/ comparison, click on the specific filter/comparison on the left-hand side (Current View). The green bar (shows that a rule is active) will disappear.

Text analysis

When you have multiple written answers, it could be helpful to organize them by tags/categories.

6. Go into your comment box question (#2) and click on **Add Tags**. Now you could assign certain tags to this response (e.g., venue, course materials). Click **Save** and a tag will be assigned to the response.
7. When you click on **Tags** in your question, you see that the tool automatically sorts the tags by %.

Exporting/sharing results

8. To export your survey data, click on the green **Save As** button (top-right hand side of your survey). Choose **Export file**. To extract all summary data (you can also extract by individual responses), click on **All summary data**. Here, you can either extract the data as a PDF or as an Excel file. To include the written responses, **check Open-ended responses**. Click on Export. After the data is exported, a box will appear at the top with a **Download** option. Download the pdf/Excel file and share if needed.