



Planning an Email Survey Campaign

Key concepts

Using the Imparto Suite to survey your customers allows you to gather feedback quickly and to produce reports easily to guide your decisions about future product enhancements.

This tutorial will show you how to do this for yourself.

Time spent planning your survey by defining your goals and composing your strategy will provide you with the best possible results. Once your plan is in place, the Imparto Suite does all the rest.

Lesson overview

In this lesson, you will learn how to

- Set survey goals
- Compose survey strategy

A. Setting Survey Goals

For our tutorial, we are going to pretend that you are a marketing associate for Orbit Wireless Communications. You are in charge of launching the release of the next model of Orbit’s Kid Kop, a special watch that uses GPS technology to locate the whereabouts of a child. You want to get feedback from your current owners about the new features in the next model of Kid Kop so that you will know which features to emphasize in your ad campaign. You also want the survey to generate interest in the next version of Kid Kop so that current owners will considering buying the next model.

Because the Imparto Suite is easy to use, there is a temptation to jump in and start sending out survey forms. Taking time to answer the following questions before you begin using the program will produce more satisfying and substantial results. As you learn all of the things that Imparto can do for you, you will really appreciate the role of advance planning in getting the most out of the Suite.

Exercise A–1: To set campaign goals

Consider	Comments
AUDIENCE - Whom am I addressing?	Certainly the product users, but who else? What about users of a competing product? What about other people who are affected by the product?
OBJECTIVE - What do I want them to do?	What kind of information do I really want? What kind of response do I want to elicit? What are the possibilities for lead generation, brand awareness, relationship building, or upsell?

Having a clear idea about the specific outcomes you wish to obtain helps you make good decisions about how you are going to set up the Imparto Suite to carry out all aspects of your email campaign.

After thinking about the audience for this campaign, you decide that you will focus on just the current owners of Kid Kop. Depending on the feedback from this group, you may decide to conduct a more general campaign later.

After thinking about the objective for this survey, you decide that you want to see the degree of interest participants have in each of the new features in the next model of Kid Kop. You also want to make it possible for them to register their current level of satisfaction with the product and to offer their own suggestions for enhancements. Through participating in the survey, you also hope to build interest in the next version of Kid Kop by informing current owners of the new features in the next model.

B. Composing email survey campaign strategy

After spending time defining your audience and objectives, the next step is to plan how to acquire participant feedback efficiently and process it in a way that will be useful. Again, taking time to answer the following questions will produce more satisfying results.

Exercise B–1: To compose campaign strategy

Consider	Comments
MOTIVATION - How will I motivate participants to respond?	Will I provide a reward for their participation? Can I provide a reward that is essentially free but very desirable?
FORM - What will be the elements of this survey?	What will the survey look like? Will customers select from a list of possible options, or will I allow for open-ended feedback? Or both? How long will it be? How will the invitation to participate read? What kind of follow-up responses will be most effective? How will I use the Imparto Suite to carry out the survey?
EVALUATION - How will I measure the validity of the feedback?	What will constitute a significant result from the survey? How will free responses--if any--be managed?

After thinking about motivation, you decide to make the current owners feel as if they are part of the Orbit development team by asking them to evaluate the desirability of the “proposed” new features. You also plan to offer customers who respond to the survey a discount when they purchase the next version of Kid Kop.

After thinking about the form of the survey campaign, you decide to link the invitation email to your company’s website so that they can feel assured their responses will be confidential. You also decide to provide two responses to each customer who fills out the survey form as well as a follow-up invitation to those customers who do not respond to the first invitation.

In evaluating your responses, you decide to place value on the percentage of votes for each of the proposed enhancements but to qualify these results by looking at the percentage of those who responded. You will also look at the general level of satisfaction in the current model of Kid Kop expressed by the owners to gauge the level of the motivation to upgrade. If there are any free responses, you will bring these to the next development meeting for discussion.

Evaluating the customer response in terms of effectiveness as well as feedback makes it possible to refine your approach and develop enhancements that will make possible a greater ROI in future survey campaigns.

C. Putting together the results of your planning

To put it all together, let's review the results of your thinking about the goal and strategy of this survey activity.:

Exercise C-1: Email survey goal and strategy

	<i>Considerations</i>	<i>Comments</i>
1.	AUDIENCE	Current users of Kid Kop
2.	OBJECTIVE	<ul style="list-style-type: none"> • To disclose level of satisfaction with current product • To obtain customer feedback on relative desirability of proposed enhancements • To invite customers to offer enhancement ideas of their own • To build interest in the next version of Kid Kop
3.	MOTIVATION	<ul style="list-style-type: none"> • By appealing to their ability to provide an expert opinion • By offering a discount to the next version of the product
4.	FORM	<p>Elements to be managed by the Imparto Suite:</p> <ul style="list-style-type: none"> • survey Webform • invitation email • confirmation message • follow-up personalized thank you email • reinvitation email for non respondents • scheduling of automatic mailings • reports of survey results
5.	EVALUATION	<ul style="list-style-type: none"> • value given to percentage response to the proposed enhancements • response qualified by percentage of overall response • response qualified by reported level of satisfaction • free-response suggestions evaluated individually by product development team

Summary

- A successful email survey begins with a concrete definition of a goal and a carefully planned strategy to achieve it.
- Taking time to plan the specific features of your survey activity before you begin working with the Imparto Suite will make your efforts more efficient.



Setting Up a Webform

Key concepts

The Webform provides an efficient way for your audience to supply you with feedback. Carefully planning the Webform's length and appearance is important in optimising participation.

Before creating a Webform, you need to set up the Webform's general parameters in the Imparto Suite so that it can be accessed easily and the information can be processed efficiently.

Lesson overview

In this lesson, you will learn how to

- Create a new Webform group
- Name a new Webform
- Select a background color
- Set up left and right margins
- Assign group access
- Activate SLL security

A. Creating a Webform group

Before creating a Webform for your survey, you must first create a new Webform group. Webform groups are essentially folders that organize Webforms into logical groupings. Each group might be associated with a specific program or activity, for instance. In this exercise, we will set up a Webform group just for Kid Kop.

Exercise A-1: To create a new Webform group

Do this

1. Click the **Website** button on the Imparto command bar to open the Website module.

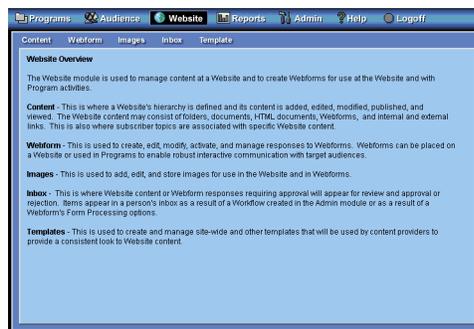


Comments

Color changes to indicate Website button has been selected..



Website window opens.



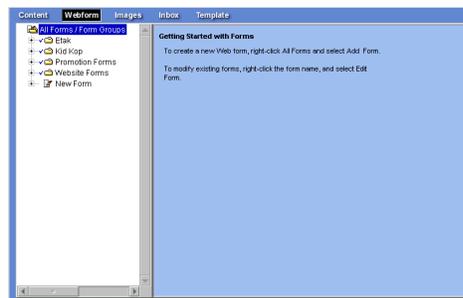
2. Click **Webform** button.



Color changes to indicate Webform button has been selected..



The Webform window appears.



3. Right click **All Forms/Form Groups** in the left frame.



Drop down menu opens .

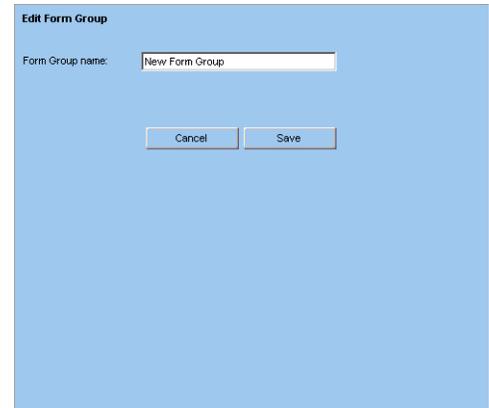


Exercise A–1: To create a new Webform group***Do this******Comments***

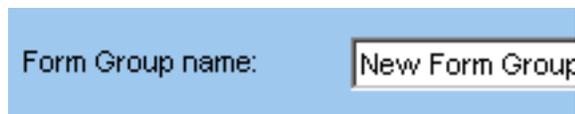
4. Select and click **Add Group** option from the drop-down menu.



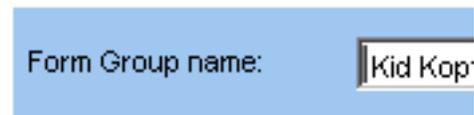
This opens the Add Form Group form in the right frame.



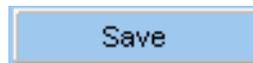
5. Triple click “New Form Group” with the I-beam pointer in the **Form Group Name** field, and overwrite with the new group name “Kid Kop.”



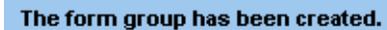
“Kid Kop” appears in Form Group Name field.



6. Click **Save** to save the new form group.



A confirmation message appears in the right frame.



The name of the new form group appears in the left frame.


B. Naming a new Webform

The process of creating the Webform begins with giving the Webform a name. This exercise takes place in the Webform window.

If you are starting this exercise from another window, click **Website**, then click **Webform** to navigate back to this window..

Exercise B–1: To name a new Webform

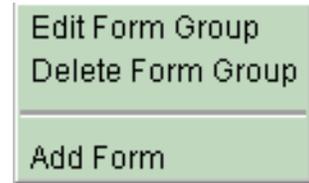
Do this

Comments

1. Right click the **Kid Kop** form group.



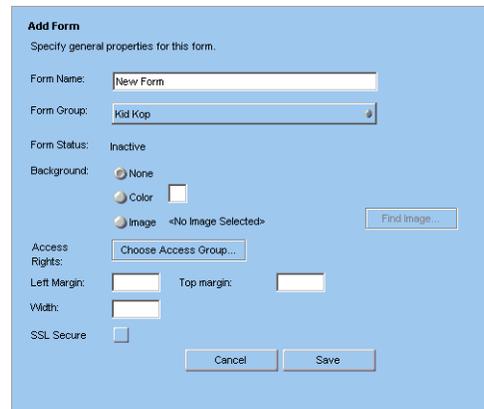
Drop down menu opens.



2. Move mouse pointer to highlight **Add Form** from the drop-down menu and click.



The Add Form form opens in the right frame.



3. Triple Click I-beam pointer over “New Form” in **Form Name** text field and over-write existing text with “Kid Kop Survey.”



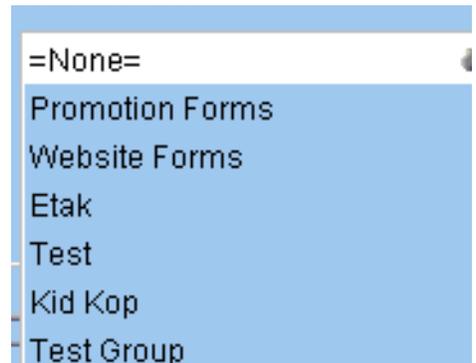
Kid Kop Survey name appears in Form Name field.



4. Confirm that the correct group for the form (Kid Kop) is selected in the **Form Group** drop-down field.



If Kid Kop is not displayed in the Form Group drop-down field, click and hold to open the field, move mouse pointer to highlight Kid Kop, and release click to select.

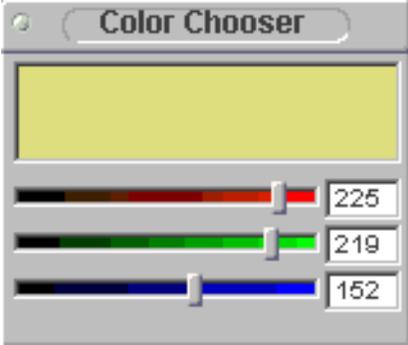
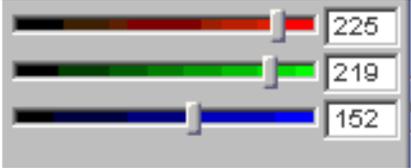
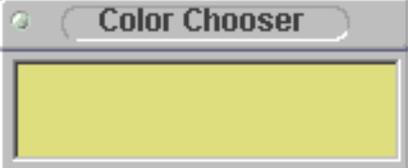
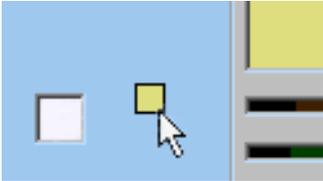


C. Selecting a background color for the Webform

In setting up your Webform, you have the option to select a background color. The following directions explain how this is done.

This exercise takes place in the Add Form form.

Exercise C-1: To select a background color for the Webform (optional)

<i>Do this</i>	<i>Comments</i>
<p>1. Click the Color radio button in the Background section of the Add Form form.</p> 	
<p>2. Click the Color field..</p> 	<p>The Color Chooser opens.</p> 
<p>3. Click and hold on a slider bar and move mouse pointer to the left or right to change color value. Select a color value by release click..</p> 	<p>The color that results from the mix of red, green, and blue values is displayed in the rectangular area below the words "Color Chooser."</p> 
<p>4. Once you have a color you like, click and hold a sample of the color in the rectangular area and drag it into the box to the right of the Color radio button.</p> 	<p>White field changes to selected color.</p> 

Exercise C–1: To select a background color for the Webform (optional)

Do this

Comments

- Click the upper left corner of the **Color Chooser** to close it.



D. Assigning group access to the Webform

Before you can save a form, you must assign an internal group access to the form for future modification and control over the form.

This exercise takes place in the Add Form form.

Exercise D–1: To assign group access to the Webform

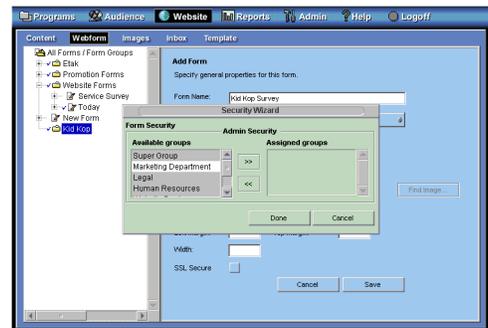
Do this

Comments

- Click the **Choose Access Group** button on the **Add Form** form.



The Security Wizard box opens..



- Click **Marketing Department** from the **Available Groups** list to highlight it, then click the arrow pointing to the **Assigned Groups** list to assign access to that group..

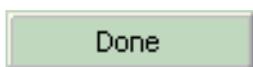
Marketing Department is moved to Assigned Groups.



To select more than one group, click and drag down to highlight the groups you want to select. To remove groups from the Assigned groups box, click to select them, then click the arrow pointing to the Available Groups box.

- When finished, click the **Done** button.

The Security Wizard box closes.



E. Setting left, top margins and width

You can set the left and top margins of the Webform as well as the width to control the amount of blank space on the Webform. These settings are in numbers of pixels.

This exercise takes place in the Add Form form.

Exercise E–1: To set up left, top margins and width

<i>Do this</i>	<i>Comments</i>
1. Click the I-beam pointer in the Left Margin field and type "10." 	10 appears in Left Margin field. 
2. Click the I-beam pointer in the Top Margin field and type "10." 	10 appears in Top Margin field." 
3. Click the I-beam pointer in the Width field and type "500." 	500 appears in the Width field. 

F. Activating SSL security

To make the Webform secure so that when it is served, it is encrypted, the box labeled "SSL Secure" must be activated.

This exercise takes place in the Add Form form.

Exercise F–1: To set the SSL Secure box

<i>Do this</i>	<i>Comments</i>
1. Click the SSL Secure box to activate SSL secure status. 	For this tutorial, you should deactivate the SSL Secure box in order to avoid problems with later exercises.

Exercise F-1: To set the SSL Secure box

Do this

2. Click Save to save the Webform.



Comments

A confirmation message appears in the right frame.

The form has been created.

To configure the destination(s) for data submitted via this form, select Setup Form Processing by right-clicking on the form name.

To add a section to this form, right-click the form name in the directory tree and select Add Section.

The name of the new Webform appears in the left frame of the Website window.



Summary

- A Webform must be stored in a Webform group.
- You can determine the general appearance of a Webform by setting a background color, left and right margins, and width.
- A Webform must be assigned access rights so that access is controlled.
- SLL security is activated in the Add Form form