

NEXUDUS

Webinar: How to set up and send Surveys

Hosted by Sam from Nexudus Support
Thursday 7th May 2020 - 5pm GMT

We'll just wait a few minutes to allow everybody to join. The Webinar will begin around 5:05pm. Thank you for your patience.

Introduction

This webinar will last around 15-20 minutes with 10 minutes at the end for questions.

Please ensure you post all questions within the Q&A function on Zoom, rather than in the Chat function.

You'll be able to find the recording of this and our other Webinars at learn.nexodus.com.



Outline

Today we'll be looking at Surveys in Nexodus.

We'll be looking specifically at:

- What surveys in Nexodus are.
- How to create new surveys.
- How to edit surveys.
- How to edit the survey email template.
- How to send surveys (including how to schedule surveys to be sent automatically).
- Review some survey results and reports.

What are Surveys in Nexodus?

A survey is the process of collecting, aggregating, and analyzing the responses from a set of questions.

From the Nexodus dashboard, you can easily create a survey to help gain feedback and insights into the member experience at your location.

Adding a new Survey

We'll need to go to the Nexodus platform and then to Community > Surveys. From here we can Add Survey.

Then we add the name and description of the Survey and Save.

When we reopen the Survey we can then add Questions.

Questions can be:

- Text
- Long Text
- Boolean
- Date
- Dropdown

Editing an existing Survey

You can reorder the questions by dragging the three lines on the left hand side here.

You can also highlight one or multiple options here to make a copy of the question or delete the question.

To add a new question, simply select Add Survey Question

Editing the email template

To edit the Survey email template, you will need to go to Settings > Notifications > Templates.

Locate the SurveyInvitation template.

Customization can be made to this template.

Ensure the {surveyurl} token is always included in the email.

Sending the Survey

Important to note that Surveys will be sent to all Members. Members are those that have an Active Contract for one of your Membership Plans.

To send, just go to the Survey and select Send Survey from the options menu.

Alternatively, you can schedule the Survey to be sent automatically on a weekly or monthly basis of your choosing.

Results & Reports

You can view the results of the survey within the Reports section.

The Survey Results report provides data on results from survey responses. It displays the customer name and email address, survey questions and the customer's response. You can download these results as an excel file using the Export button at the top here.

The Survey Results Summary Report provides summary data on results from survey responses. It displays each question, each unique response, as well as the quantity and percentage of each response. This report includes statistics on the number of surveys sent and completed.

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Q&A

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