Surveys

The **Surveys** screen is where you can create and organize Net Promoter Score (NPS) **Surveys** to send to your customers, either as a one-time **Broadcast** to a specific **Customer Group**, or as an Automatic survey each time an invoice is completed. Default settings prevent a customer from receiving a survey more frequently than once every 2 weeks.

How to Create a Survey

1. Open the **Surveys** screen using the menu on the left side of the screen.
    a. The **Surveys** screen displays all existing **Surveys**.
2. Select the blue <u>New Survey</u> button.
    a. The New Survey drawer displays. Enter the following.
        i. *Title* and *Description*: These are never shared with the customer; they are just for your reference.
        ii. *Type*: Broadcast Loyalty Surveys are sent manually to a customer group. Automatic Loyalty Surveys are sent to each customer who has an invoice completed.
            1. When selecting Automatic Loyalty Survey, three toggles appear allowing you to automatically send this survey to Parts, Equipment, and/or Service customers.
        iii. *Location*: Which location is this survey for? This is great if you want separate surveys for separate locations.
        iv. Select the <u>Create</u> button when complete.
            1. The Survey editor displays.
3. The Survey editor has several tabs and sub-screens:
    a. The Questions tab has 3 tabs for customizing your survey questions:
        i. NPS Question: The first question on your survey, asking for a rating from 1-10.
        ii. Passive & Promoter Questions: What (if any) questions do you want to ask customers who rate you 7-10?
        iii. Detractor Questions: What (if any) questions do you want to ask customers who rate you 1-6?
    b. The Thank-You Page tab controls the thank-you page a customer sees when they complete your survey.
        i. Passive & Promoter Thank-You Page: Thank you message and options to review your business on public sites. This is only for customers who rate 7-10.
        ii. Detractor Thank-You Page: Thank you message, no option for public reviews.
    c. Settings: Adjust settings entered when creating the survey.
        i. When Automated Surveys are active, you can adjust which customers receive them, and during which time ranges automatic Surveys will be sent.
        ii. Preview your survey by selecting the blue <u>Eye</u> button in the top right corner.
        iii. Activate an Automated survey by switching the <u>Power</u> button in the top right corner to green.

   iv. Send a Broadcast Loyalty Survey by selecting the Right Arrow button to select Customer Groups to which to send the survey.
   d. Message: What words appear in the text message sent to your customers?
   e. Summary: Once in use, the summary tab will display the results data from completed Surveys.

The **Feedback** screen is where customer responses to all **Surveys** are gathered in one place for easy viewing.

How to View Customer Feedback

1. Open the **Feedback** screen using the menu on the left side of the screen.
   a. The **Feedback** screen displays survey results from the last 6 months by default.
2. Along the top of the screen display 5 small boxes with the following data:
   a. Total number of completed surveys.
   b. Total number of detractors (rating 0-6) and the percentage of total.
   c. Total number of passives (rating 7-8) and the percentage of total.
   d. Total number of promoters (rating 9-10) and the percentage of total.
   e. Loyalty score: Percentage of promoters minus percentage of detractors.
3. The table displays data on each completed survey:
   a. Date the survey was completed.
   b. Customer that completed the survey.
   c. Cell phone number of the customer.
   d. Rating (0-10) the customer gave the dealership (color-coded).
   e. Response to any follow-up questions in the survey.
   f. Location to which the survey applies.
   g. Which Survey did the customer complete?
4. Selecting the Customer name will open the Customer Details drawer, just like in the **Customers** application.
5. Select the blue Filter button to filter your results by any of the following criteria:
   a. *Survey Response Between*: Enter a date range.
   b. *All Locations*: specify location.
   c. *Survey*: Select one or more Surveys to view.
   d. *Keyword Search*: Search by survey name or responses.
   e. Responses radio buttons allow you to filter by customer rating.
6. The blue Down Arrow button in the top right corner allows you to download the currently displayed records in a comma-separated values (.csv) file, which is compatible with most spreadsheets.