

# Surveys

## User Guide

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# Surveys Overview

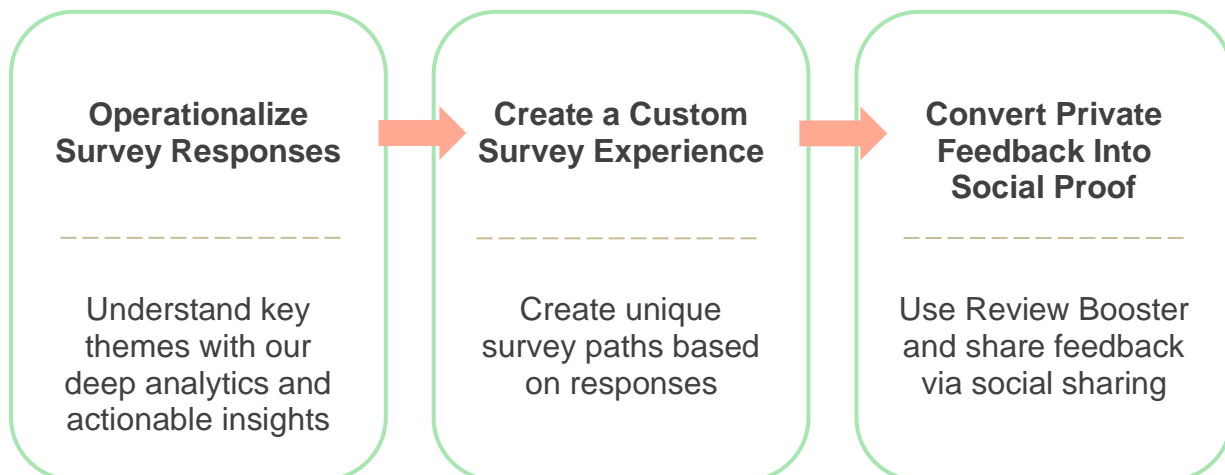
Give locations the feedback and precise insights they need to attract, delight, and retain customers.

There are several valuable tools for brands to consider when looking to improve their business product, service, and overall customer experience (CX). Conducting customer surveys is a great way to measure the impact of your CX efforts and determine whether you are meeting customers' expectations.

The Surveys tab within the Reputation platform allows you to build and send tailored customer surveys to assess performance and uncover hidden service issues before bad reviews affect your ratings. With Surveys, you can:

## *Gather Feedback Quicker*

Deliver surveys through customers' preferred channels



## Designing a Survey

Quickly and easily configure the styling, pages, and questions to create a custom survey and generate high response rates through email, SMS, or at location-based kiosks. You can also specify pathing, conditional visibility, and page jumps; configure custom scoring formulas; and specify which questions to use for overall rating, NPS, and comments.

The screenshot shows a configuration panel titled "Rating" with a three-dot menu icon in the top right corner. On the left side, there are two checkboxes: "Required" (unchecked) and "Pathing" (unchecked). The main area contains two text input fields. The first field contains the text "Please rate your visit." and has a dropdown menu labeled "Insert Variable" to its right. The second field contains the text "Click on a star to set a rating." At the bottom right of the panel is a green button with a white checkmark and the text "Done".

## Types of Surveys

### Simple Surveys

Simple survey flows use the default request templates for “Star” or “Smiley” designs. These templates do not allow for any customization to the survey and are designed for easy, out-of-the-box feedback requests (first-party) with follow-up review requesting (third-party).

### Conversational Surveys

Conversational surveys are designed for quick back-and-forth interaction via SMS text messaging to get in-the-moment insight. Timeliness is critical in preventing negative experiences from getting out of control.

Create new conversational surveys from the **All Surveys** tab. The survey builder allows you to specify the questions, pathing, and conditional visibility. When you’re ready, you can test the survey flow on your own mobile device.

**Note:** While Conversational Surveys offer fewer types of questions due to the technical limitations of text messages, they typically have higher open rates than that of Simple Surveys.

### Kiosk Surveys

Kiosk surveys collect customer feedback instantly via a web-based survey on a tablet at the point of in-person interaction. Examples of these surveys include after a doctor’s appointment while still in the office and post-meal in a restaurant after paying.

## Review Booster

Review Booster helps you get chosen at scale by converting private survey feedback into public reviews on sites such as Google. Leverage API integrations to increase survey and review responses, with zero feedback waste. If a customer chooses not to post their feedback as a review, their feedback can instead be streamed to your paid Google ads as a star rating or to your website pages through widgets.

1

### Customer Satisfaction Survey

1. Please rate your visit.

★ ★ ★ ★ ★  
Poor Excellent

1. Please let us know about your experience.

Submit

2

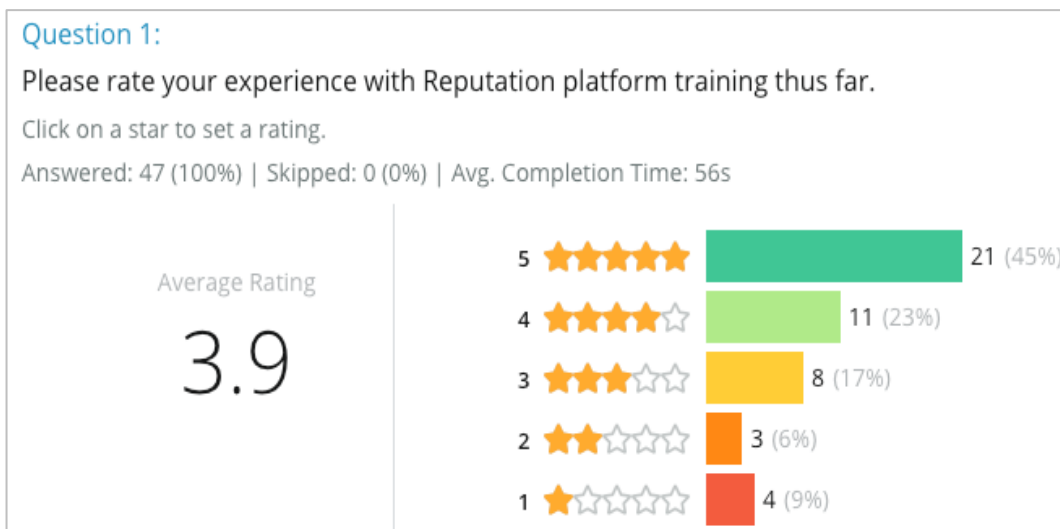
We would be grateful if you would take a moment to share your review on Google.

Yes, post my review on Google No, don't post my review on Google

## Survey Results

Get at-a-glance metrics and actionable data through multiple areas of the platform. You'll know instantly where your strengths lie, and what areas need attention.

You can also empower your team to respond quickly and appropriately to customer concerns and complaints, demonstrating your commitment to improving their experience.

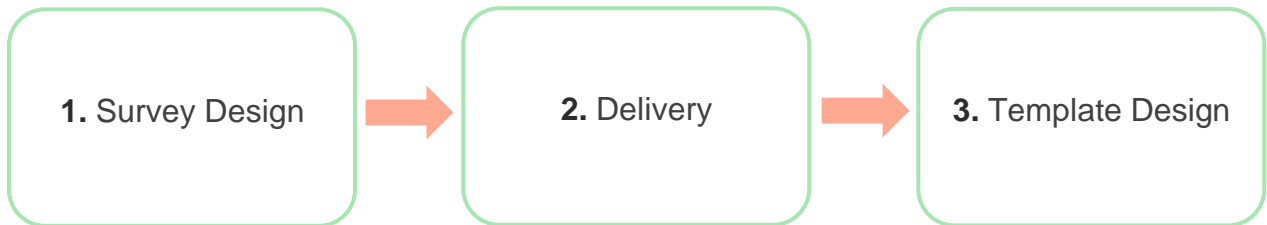


# Survey Checklist

Complete the following checklist to deploy your very first survey with success!

## Survey Setup

The survey setup process consists of the following main steps:



### 1. Survey Design

Easily design your surveys with custom styles, pages, and questions within the in-platform survey builder. You can also specify pathing and visibility; configure custom scoring; and specify which questions to use for overall rating, NPS, and comments. Although the Reputation team can assist you with this process, the survey builder gives you the tools you need to perform much of the design yourself!

### 2. Delivery

Before you consider the design of the survey, you must decide how your customers will access the survey.

Send automated surveys via email or SMS through the Reputation platform using a request template. This preferred option is beneficial for streamlining the entire survey process because all data resides within one system.

Additionally, sending from the platform allows you to embed an initial survey question into the body of the message, such as an NPS or star rating, to leverage immediate pathing based on the response (e.g., Positive flow vs. Negative flow).

If you already have a fully managed customer email or SMS infrastructure in place, consider sending surveys from Facebook, your website, email, etc. by obtaining a direct link to the survey to display within. Reach out to your Customer Success Manager for assistance with the required configurations.

### 3. Request Template

If you choose to send surveys via email/SMS through the platform, the Reputation team can help you configure the request template. Some important considerations for the template include:

Item	Description
<b>Type</b>	Should the survey invitation be sent via SMS or email? Although SMS supports a more conversational style, email templates provide more design flexibility.
<b>Recipients</b>	Configure an automated integration with your CRM or external system by using Rep Connect, which uses real-time data via API or transactional data via CSV over SFTP. Alternatively, compile a list of recipients and send surveys requests via quick request or the bulk uploader from the platform.  For additional information, check out our Support Portal.
<b>Segmentation</b>	Determine whether the template applies at the tenant (all locations) or location level (unique per location).
<b>Design Elements</b>	Depending on the template type, specify a logo, header content, and footer text that is consistent with your brand.
<b>Body</b>	Compose the introduction, apply custom variables to personalize the email, and determine whether to use an initial survey question in the message to initiate positive/negative flow.

**Note:** Request templates require respondent Email and Name questions in the survey (can be hidden from view). These questions pass identifying information necessary for delivery and responses.

# Designing a Survey

Surveys should remain concise and should always have your goal in mind. If you have multiple goals, consider creating multiple surveys.

Customize the styling, pages, and questions to make up a survey that fits your needs:

- Specify pathing, conditional visibility, and page jumps for the best user experience for your customers
- Choose which questions will be used toward overall rating, NPS, and comments
- Configure custom scoring

## New Surveys

You can choose to build from a pre-built survey template (Regular, Conversational or Kiosk) or create a survey from scratch. A new, blank survey includes a welcome page (customizable), one page (that contains at least one question) and a Thank You page (customizable).

You can remove those items or add additional questions/pages, turn on/off progress bar, edit the heading, customize the logo, modify other design elements, and set advanced properties and pathing and visibility.



A sample survey flow is as follows:

## 1. Welcome Page

The screenshot shows the 'Welcome Page' of a 'Customer Feedback Survey'. At the top, there is a blue header with the title 'Customer Feedback Survey' and a progress bar with three segments, the first of which is filled. The main content area has a light gray background and contains the text: 'We want to hear about your experience!' followed by 'Please take a minute to rate our service and tell us about your recent visit.' At the bottom, there is a blue button labeled 'Next'.

## 2. Questions Page

The screenshot shows the 'Questions Page' of a 'Customer Feedback Survey'. At the top, there is a blue header with the title 'Customer Feedback Survey' and a progress bar with three segments, the second of which is filled. The main content area has a light gray background and contains two questions. Question 1: 'Please rate your overall satisfaction with your visit. Click on a star to set a rating.' Below this is a five-star rating system with five gray stars. The first star is highlighted, and the word 'Poor' is below the first star, and 'Excellent' is below the fifth star. Question 2: 'Setting up my appointment was easy. Select one.'

## 3. Review Request Page

The screenshot shows the 'Review Request Page' of a 'Customer Feedback Survey'. At the top, there is a blue header with the title 'Customer Feedback Survey' and a progress bar with three segments, the third of which is filled. The main content area has a light gray background and contains the text: 'We would be grateful if you would take a moment to share your review on Google.' Below this, there are two buttons: a blue button labeled 'Yes, post my review on Google' and a white button with a blue border labeled 'No, don't post my review on Google'.

## 4. Thank You Page

The screenshot shows the 'Thank You Page' of a 'Customer Feedback Survey'. At the top, there is a blue header with the title 'Customer Feedback Survey' and a progress bar with three segments, the third of which is filled. The main content area has a light gray background and contains the text: 'Thanks for the word! Let the world know.' Below this, there are two buttons: a blue button labeled 'Facebook' and a white button with a blue border labeled 'DocSpot'.

**To create a new survey:**

1. From the platform, hover over **Surveys** and then click **All Surveys**.
2. Click **Create a Survey**.

STATE CITY LOCATION ZONE

All All All All

BRAND DATE RANGE

All Last year

▲ Hide Filters ↻ Reset Filters

All Surveys (44)

Sort By Recent First

⊕ Create a Survey

3. Under the **Regular** tab, click **Blank Survey** and then **Create**.

**Note:** You can also choose to start from a pre-built survey template or build a Conversational Survey or Kiosk Survey from scratch.

4. Edit the following by clicking the icons highlighted in the image below:
  - a) Survey title: Click the pencil icon to label the survey
  - b) Color scheme: Click the dropdown to change the color scheme of the survey
  - c) Properties: Click the gear icon to change the survey's settings, including Survey Quality indicators, Locales, PII expiration, Anonymity and more.

◀ | Untitled [pencil icon] Design Regular Last saved 10/20/22 2:21 PM [color dropdown] [eye icon] [gear icon]

[share icon] [flask icon]

Survey Welcome Page Scores Review Request

Reporting Settings Translations JSON Editor

5. Add questions and/or pages. Refer to page 15 for types of questions available.

6. Edit question properties. (Hover over question and click). Refer to page 11 for **pathing** and **visibility**.
7. Edit each question as needed and as shown in the image below:
  - a. Click the ellipsis to change question type or properties.
  - b. Hover over the module to view the arrows on the right-hand side. Click up or down to rearrange the order of questions.

8. Click **Review** on the navigational menu at the top of the page to specify which question(s) measure overall rating, NPS, and/or comments.

9. Click the eye icon to **preview** the survey and the changes you made.

**Note:** Changes are saved as you work. Reach out to Support for assistance with custom scoring and request properties as needed.

## Survey Pathing and Conditional Visibility

Survey pathing and conditional visibility gives you incredible flexibility for creating survey experiences based on conditions. You can apply pathing and visibility to individual questions in the survey or at the page level.

By default, questions and pages within the survey are displayed in the order they're listed. Pathing allows you to jump to other sections of the survey. After a jump, the survey continues to flow in the order listed unless conditional visibility or additional pathing is applied to the landing point.

Property	Description	Example
<b>Pathing</b>	<p>Determine where to go in the survey based on response. This redirects respondents to a different page, rather than to a particular question depending on their responses.</p> <p><b>Note:</b> With Pathing, you can manage how many of a certain response you receive. For example, if you want your data to focus on the negative comments, set up a pathing rule to send a number or percentage of people who gave a positive rating to the Thank You page.</p>	<p>If answer is ___, send <u>[number/percentage]</u> of respondents to page ___ question ___.</p>
<b>Conditional Visibility</b>	<p>Determine whether to show/hide the question based on conditions (scripting variables).</p> <p>You can also set visibility based on static preference. "Hidden" is often used to pass concealed respondent data into the results, such as name and email.</p>	<p>Hide this question if values for question ___ &gt; ___, OR question ___ &lt; ___.</p>

## How to Apply Pathing

1. Click into the question you wish to apply pathing to.
2. Click the checkbox to conditionally jump to a page or question based on a set of rules.

### Rating

☐ Required
 

Please rate your visit.

Insert Variable ▾

☐ Pathing
 

Click on a star to set a rating.

3. Set your rule to direct a number or percentage of people to the next question or page.

Please rate your visit.

Insert Variable ▾

Click on a star to set a rating.

If answer is

to

send

of respondents to

1

5

100

Than... ▾

Than... ▾

+

Add Path

+

Add Percentage Rule

Thanks for the word!

Review Sites

4. Click **Done**.

### How to Apply Conditional Visibility

1. Click the ellipsis for the question you wish to apply conditional visibility to.
2. Click **Edit Question Visibility**.
3. Choose between the following options: Shown, Hidden, Conditionally Hidden, and Conditionally Shown.

4. Apply filters (or conditions) to show or hide the next question if the customer responds in a certain way.
  - a. When setting visibility to “Conditionally Hidden” or “Conditionally Shown,” you must specify the condition in the form of an expression, which must contain a minimum of:

Variable	Operator	Value
Variables are code references to questions. Click the Open Scripting Variables and Values button to locate the variable you want to use.	Operators define the logical notation to use, such as > < = OR AND NOT CONTAINS. Enclose strings inside single quotation marks.	Value refers to the input for the selected variable.

- b. Input the code under the **Advanced** tab, or use the filter set builder on the **Basic** tab.

5. Click **Done**. The question's module will show when Conditional Visibility is applied.

The most common pathing technique is to initiate an overall positive or negative flow from within the custom request template. You can either embed the initial pathing question directly in the email request or add the initial pathing question in the survey.




Either way, it's recommended to use the Star Rating or NPS question types if your goal is to invoke an initial positive/negative flow.

**Note:** Click the ellipsis at the page level to **Edit Page Jump** or **Edit Page Visibility** to direct respondents from page to page.

To apply pathing at the page level, no questions


## Question Types

You can design surveys with the following question types:

Type	Example
<b>NPS</b>	<p>1. Based on your experience; how likely are you to recommend our dealership to a friend, family member, or colleague?</p> <p>0 1 2 3 4 5 6 7 8 9 10</p> <p>Not Likely Very Likely</p>
<b>Rating</b>	<p>Please rate your visit.</p> <p>Click on a star to set a rating.</p> <p></p> <p>Poor Excellent</p>
<b>Select One</b>	<p>Which of the following do you prefer?</p> <p>Select one.</p> <p><input type="radio"/> Quality</p> <p><input type="radio"/> Value</p> <p><input type="radio"/> Selection</p>
<b>Select Many</b>	<p>Which of the following do you prefer?</p> <p>Select one or more.</p> <p><input type="checkbox"/> Quality</p> <p><input type="checkbox"/> Value</p> <p><input type="checkbox"/> Selection</p>
<b>Date</b>	<p>When did you attend our facility?</p> <p>mm/dd/yyyy  </p>
<b>Dropdown</b>	<p>Which of the following do you prefer?</p> <p>Select one.</p> <p>Select ▼</p>



Type	Example																								
Select One Grid	<div><p>Please state your opinion on the scale below.</p><p>One response required per row.</p><table><thead><tr><th></th><th>Poor</th><th>Fair</th><th>Good</th><th>Excellent</th><th>N/A</th></tr></thead><tbody><tr><td>Quality</td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td></tr><tr><td>Value</td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td></tr><tr><td>Selection</td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td><td><input type="radio"/></td></tr></tbody></table></div>		Poor	Fair	Good	Excellent	N/A	Quality	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Value	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Selection	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
	Poor	Fair	Good	Excellent	N/A																				
Quality	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>																				
Value	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>																				
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Select Many Grid	<div><p>Please state your opinion on the scale below.</p><p>Select one or more per row.</p><table><thead><tr><th></th><th>Breakfast</th><th>Lunch</th><th>Dinner</th><th>Snack</th></tr></thead><tbody><tr><td>Apple</td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td></tr><tr><td>Banana</td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td></tr><tr><td>Orange</td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td><td><input type="checkbox"/></td></tr></tbody></table></div>		Breakfast	Lunch	Dinner	Snack	Apple	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Banana	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Orange	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>				
	Breakfast	Lunch	Dinner	Snack																					
Apple	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																					
Banana	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																					
Orange	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>																					
Comment	<div><p>Please tell us about your experience.</p><div><p>Type your comments here...</p></div></div>																								
Terms of Service	<div><p><input type="checkbox"/> By submitting feedback, you grant Reputation.com and {{location-name}} the right to publish or share the response with others.</p></div>																								
Heading	<div><p>We want to hear about your experience!</p><p>Please take a minute to rate our service and tell us about your recent visit.</p></div>																								

Type	Example
Image	<div> <div>Url</div> <div>Upload</div> <div>  Drop file to attach, or <a href="#">browse</a>  Accepted formats: jpeg, jpg, gif, png </div> </div>
Label	<div>Customer Service</div> <div>Please take a minute to rate our service and tell us about your recent visit.</div>
HTML	<div>&lt;h3 class="text-center"&gt;Custom HTML&lt;/h3&gt;</div>
File Upload	<div> <input type="checkbox"/> Required <div> <div>Upload a file</div> <div>Insert Variable ▾</div> </div> <div>Enter optional subtext</div> <div> <input checked="" type="checkbox"/> Validate answer <div> <div>File U... ▾</div> <div>Any File Type ▾</div> </div> </div> <div> <input type="checkbox"/> PII Field </div> </div>
Respondent Email*	<div>What is your email? *</div> <div>Type your email here...</div>
Respondent Name*	<div>What is your name? *</div> <div>Type your name here...</div>
Respondent Phone*	<div>What is your phone number? *</div> <div> <div>+1</div> <div>Type your phone here...</div> </div>
Respondent Anonymity	<div><input type="checkbox"/> Submit my response anonymously</div>

**Note:** \*These questions are often inserted as “Hidden” (Conditional Visibility = Hidden) in order to pass concealed respondent data into the results.

## Thank You Page

Include a message thanking your survey takers who make it to the end. By default, new surveys include a heading and review sites section on the thank you page. These are customizable but can also be removed.

## Review Sites

Review Sites allow for the following customizations:

- **Platform Selects Sources:** Check the Automatic Source Selection box to allow the platform to choose the review sites to include. Check the box next to specific sites to exclude from the automatic source selection.

### Review Sites

☒

Automatic Source Selection

Select the sources to exclude from automatic source selection.

[Check all](#)
[Uncheck all](#)

<input type="checkbox"/> Glassdoor	<input type="checkbox"/> Google	<input type="checkbox"/> MD.com
<input type="checkbox"/> DocSpot	<input type="checkbox"/> BBB	<input type="checkbox"/> ZocDoc
<input type="checkbox"/> Indeed	<input type="checkbox"/> G2	<input type="checkbox"/> HealthGrades
<input type="checkbox"/> Facebook	<input type="checkbox"/> RateMDs	

✓ Done

- **Specific Sources Selected:** Uncheck the Automatic Source Selection box to select the source(s) that can show on the Thank You page. Check the box next to specific sites to be included.

### Review Sites

☐

Automatic Source Selection

Select the sources that can show.

[Check all](#)
[Uncheck all](#)

<input type="checkbox"/> Glassdoor	<input type="checkbox"/> Google	<input type="checkbox"/> MD.com
<input type="checkbox"/> DocSpot	<input type="checkbox"/> BBB	<input type="checkbox"/> ZocDoc
<input type="checkbox"/> Indeed	<input type="checkbox"/> G2	<input type="checkbox"/> HealthGrades
<input type="checkbox"/> Facebook	<input type="checkbox"/> RateMDs	

✓ Done

# Simple Surveys

Simple surveys are review request templates that ask for first-party feedback, too.

To request feedback with simple surveys from customers, click **Requests** along the left navigational menu, and then click **Bulk Requests**. Choose from the available default request templates to customize the simple survey to your needs.

At one point in time, it was not uncommon for businesses to practice review gating, i.e., asking customers with positive experiences to leave public reviews. However, this is a highly controversial method as it is inherently deceptive to present inflated ratings online and compensate for negative reviews by burying them with positive ones.

As such, the Reputation platform no longer supports review gating.

At the end of the simple survey flow (regardless of template chosen), the consumer is presented with options to copy their survey feedback to a third-party review for posting publicly. You can choose which review site options are available within the request settings.

**Un-check sites below to exclude those sites from requests.**

<input checked="" type="checkbox"/> DocSpot	<input checked="" type="checkbox"/> Facebook	<input type="checkbox"/> Glassdoor
<input checked="" type="checkbox"/> Google	<input checked="" type="checkbox"/> LinkedIn	<input type="checkbox"/> Survey

Consumers who choose Google as the request option will not be required to copy/paste their feedback into the form. Instead, the rating and comment are automatically captured from the survey and populated in the Google review box, which is posted directly to Google from the Reputation platform. Sending from our platform (as opposed to pushing the reviewer to Google's system) improves the ability to attribute reviews to requests. It's also one less step for the reviewer to take, which helps conversion.

**Note:** You can optionally publish ratings generated from simple survey requests to your **My Reputation** syndication page. Go to your **Admin Settings** and click **Syndication**.

# Conversational Surveys

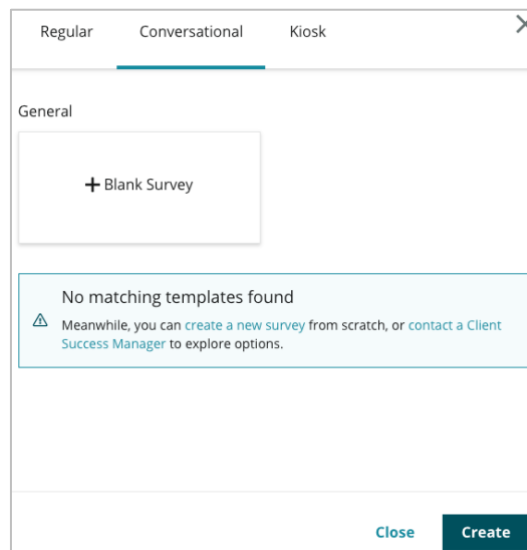
Collect large volumes of short, rapid-fire feedback with text message surveys.

The survey builder allows you to specify the questions that make up a survey. You can also specify pathing and conditional visibility. When you're ready, you can test the survey flow on your own mobile device.

**Note:** Refer to Page 12 for more tips on survey strategy and description of question types while designing a survey.

## *To create a conversational survey:*

1. From the platform, click **Surveys > All Surveys**.
2. Click **Create a Survey**.
3. Under the **Conversational** tab, click **Blank Survey > Create**.



**Note:** You can also choose to start from a pre-built template if available.

4. Set the Survey Name (e.g., "Your Initials – Conversational").

5. Click inside the Rating question to show the properties.

6. Enter optional responses for positive, neutral, and negative ratings. These responses will conditionally be pre-appended to the next response element in the survey:
- **Positive:** We're so glad you had a great experience!
  - **Neutral:** We regret to see that your recent experience was anything less than exceptional.
  - **Negative:** We are disappointed to hear that your experience was not positive.
7. Click **Done** to close the question properties.
8. Below the rating question, click **Add a Question > Comment**.
9. Click inside the Comment question to expand the properties.

10. Change the question text to, "What can we do better on your next visit?"

**Note:** We'll show this question immediately after the customer's rating response. If you want to show different comment questions based on the value of the rating given, try clicking the ellipsis and experimenting with conditional visibility.

11. Click **Done** to close the question properties.

12. Click inside the Heading question to change the verbiage to: “Thanks for your feedback.”

13. Click **Add a Question > Review Sites**.

14. Click inside the Review Sites question. Clear the Automatic Source Selection check box and select Google and another review site. Click Done when finished.

15. At the top of the survey designer, click **Settings**.



16. Set the Survey Status to **Active**.

17. Click **Save**.

18. Click **Request** at the top of the survey builder. From the dropdown, select the request template(s) that will be used to send out this survey. This allows your conversational survey to be selectable when sending requests.

19. From the Requests tab (on the main navigation menu on the left-hand side), click **Quick Request**.

**Note:** You can also send Conversational Survey requests in bulk. Refer to page 19 to learn more about sending bulk requests.

20. Click the **Conversational Survey** tab.  
 21. In the Location box, type the location you want to use for the request (e.g., “BDP – Uptown”).  
 22. Enter your name and phone number.

23. In the Template drop-down, choose the template designed for Conversational Surveys.

**Note:** There are no system templates for Conversational Survey, so no one will need to be created for your account.



24. In the Survey Template drop-down, choose the survey you just designed.

The screenshot shows the 'Survey Template' configuration page. At the top, there is a 'Survey Template:' section with a dropdown menu currently set to 'Select'. Below this is a link for 'Hide advanced options'. The 'Dynamic Fields:' section includes 'Custom Variables' with a downward arrow. A required field '\* recipient-name:' is shown with an empty text input box. The 'Standard Variables' section has a rightward arrow. Under 'Review Sites:', the 'Reputation.com inserted' radio button is selected. A box titled 'Un-check sites below to exclude those sites from requests.' contains a list of sites with checkboxes: DocSpot, Facebook, Glassdoor, Google, LinkedIn, and Survey. All checkboxes are currently checked.

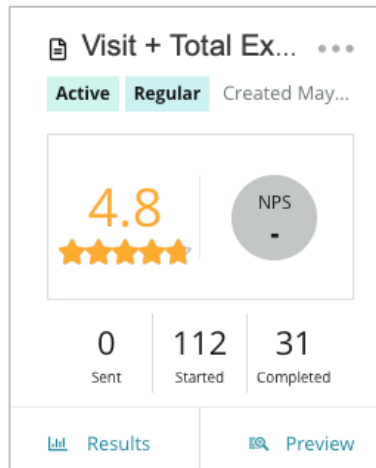
25. Click **Send SMS**.

**Note:** Click **Test** to view what the SMS will look like. Results are not saved, but you cannot interact with the message functionality. Click **Send SMS** to receive a text message and experience the flow.

# Viewing Survey Results

The Surveys tab displays survey results from first-party surveys sent by your company.

All surveys you create on the Surveys tab appear in the All Surveys view in either Card View or List View.



**Note:** A rating for the NPS question must be identified on the Survey Review settings.

Within either Card View or List View, you will see the following statistics:

Stat	Description
<b>Sent</b>	Number of email and/or SMS requests sent from the designated template. Choose the template(s) to associate with each survey under the <b>Request</b> settings when designing a survey.
<b>Started</b>	Number of times a survey is opened in a browser. This includes previewing a survey.
<b>Completed</b>	Number of finished, submitted surveys.

## Results

Click the **Results** icon to view Summary Score (if applicable), and Detail results for the selected survey. Use the top line filters to limit the data shown.

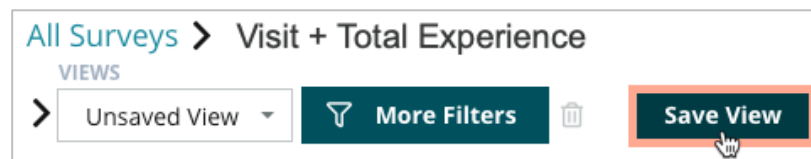
### Summary

The Summary tab of the results shows graphical representations for total results. Results are grouped by:

- **Overall NPS / Overall Rating** – Sortable by time or by location (All, Top 10, Bottom 10). Toggle between NPS and Rating.
- **Question** – Graphs vary by question type.
- **Survey Properties** – Additional reportable metadata determined at the time of survey design.

Filter the Summary tab by clicking into charts in the questions section or by using the More Filters option at the top of the page to dive deeper into results and trends for specific answers.

Click **Save View** to save a copy of your filtered Summary tab for future reference in the Views dropdown.



### Score

Upon clicking into the survey's results, click **Scores** to drill further into customer feedback.

Computed Score

Empathy

Enter optional description

☐ Set custom scale default is 0 to 5

Enter the Groovy DSL script below.

```

if (sq21.contains('o22')) a=100
else if (sq21.contains('o23')) a=75
else if (sq21.contains('o24')) a=50
else if (sq21.contains('o25')) a=25
else if (sq21.contains('o26')) a=0
else a = null

if (a!=null)return Math.round(a/20 * 10)/10 else return null
          
```

**Note:** Customer scores must be built into the survey during the design process.

## Details

View individual survey submissions and respond to customers.

BDP - Uptown Jun 9, 2022

Anonymous k\*\*\*\*\* Completion Time - 1m 21s Device Type - Desktop IP Address - 2\*\*\*\*\* People

How would you rate the empathy of the staff at this clinic?

**Exceptional** Good Moderate Less than expected Not at all

You selected Exceptional . How well did the physician or practitioner you met with explain your options and answer questions?

Excellent **Good** Moderate Less than expected Not at all

Wait times include time spent in the waiting room and exam room. In the last 12 months, how often did you see your provider within 30 minutes of your appointment time?

Always **Usually** Sometimes Never

Overall how would you rate the hygiene or cleanliness of this clinic?

Excellent Good Moderate Less than expected Not at all

Based on your experience; how likely are you to recommend this clinic to a friend, family member, or colleague?

0 1 2 3 4 5 6 7 8 9 **10**

Not Likely Very Likely

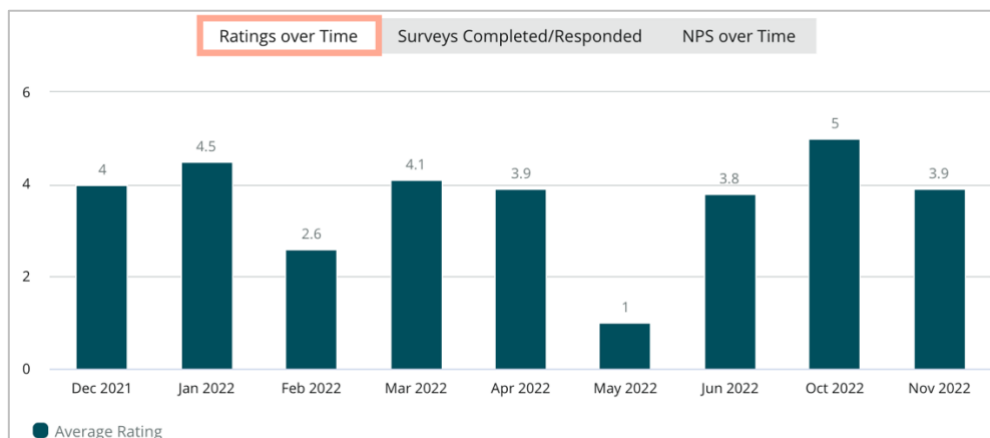
## Results Feed

View your survey results in the way that is most meaningful to you, such as filtering survey data by date, location, sub-brand, or sentiment.

STATE	CITY	LOCATION
All	All	All

ZONE	BRAND	DATE RANGE
All	All	Last year

These visualizations dynamically update according to the filters you've set, allowing you to highlight important feedback themes more-so than text or tabular data. Choose between the Ratings over Time, Surveys Completed/Responded, or NPS over Time charts.



## Results Manager

The Survey Results Manager allows you to see all responses in a single view for analysis. You can filter survey data and save as a custom view for easy access. For example, you may want to filter responses that have NPS < 3 and Category = Parking.

To use Results Manager:

1. From the **Surveys** menu, click **Results Manager**.
2. From the Surveys drop-down, select the survey you want to manage. (You can select one at a time.)
3. Click **More Filters** to filter results by survey question / value.
4. Click **Edit Columns** to customize the on-screen data shown in the results.
5. Click the ellipses to **Download as CSV** or **Schedule** the report for regular delivery.

**Note:** You can also view Overall NPS/Rating, NPS/Rating Trend, Survey Health Metrics, and a Comment Snapshot across all your surveys in the Survey Dashboard.

# NPS Score Calculations

Net Promoter Score (NPS) is an index ranging from -100 to 100 that measures the willingness of customers to recommend your products and services to others.

1. Based on your experience; how likely are you to recommend our dealership to a friend, family member, or colleague?

0	1	2	3	4	5	6	7	8	9	10
Not Likely							Very Likely			

This score is based on the following survey question type, color-coded according to the following descriptions:



Customers who give you a 6 or below are **Detractors**.



Customers who give you a 7 or 8 are **Passives**.



Customers who give you a 9 or 10 are **Promoters**.

To calculate your NPS the system detracts the percentage of Detractors from the percentage of Promoters. So, if 50% of respondents were Promoters and 10% were Detractors, your Net Promoter is a score of 40.

$$\text{NPS} = \% \text{ 😊 } - \% \text{ 😞 }$$

# Using Custom Scores

Custom survey scores allow you to restructure survey responses in order to generate your own scoring mechanism within results. Computations for custom scores are written using Groovy DSL scripts. (See below for example syntax.)

Let's create custom scoring for the following scenario. Assign a behind-the-scenes score to the following two questions. Then generate a total "Staff Superstar" score based on the average of those individual scores. Once you have the scores, you can rank your top locations for each.

**Heads Up!** If you are adding scores to a live survey, you cannot edit the scripts after exiting out of the survey designer.

## To create custom scores:

1. From the **Surveys > All Surveys** tab, click **Edit** next to the survey you want to apply scores to.
2. From the Survey Designer, click the **Scores** tab.
3. Click **Add a Score**.

A default script appears in the scripting box:

```
return sq19
```

4. Enter a Score Label. In our example, the first score will be for the Empathy question.
5. At the top of the script, expand the **Variables available for scripting are** link.

All of the available variables and values within the survey are listed for you to reference in your script. Since our Empathy question is the first question in the survey, we'll start with referencing sq19 (variable) and all of its possible values (o20, o21, o22, o23, o24).

6. Modify the script to the following, where 'a' is the variable assigned to the **Empathy** score:

```
if (sq19.contains('o20')) a=100
else if (sq19.contains('o21')) a=75
else if (sq19.contains('o22')) a=50
else if (sq19.contains('o23')) a=25
else if (sq19.contains('o24')) a=0
else a = null

if (a!=null)return Math.round(a/20 * 10)/10
else return null
```

**Note:** The final score can be a custom scale but defaults to 0-5. The example uses a 0-100 -point score for purposes of showing syntax for calculation. This is useful if the questions have 3, 4, or 5 options to choose from and you need to convert it to common scale.

7. Click **Test**.

Within the Test Computed Question window, randomly selected survey answers/values are generated for you. If there are no errors in the script, the test results should return a score based on the random value chosen. Click Test Again to generate new random values and ensure the score updates accordingly.

8. Click **Done** to return to the Script page.
9. Click **Add a Score**.
10. Repeat the steps above to create another score for **Communication** using the following script, where 'b' is the variable assigned to the **Communication** score:

```
if (sq26.contains('o27')) b=100
else if (sq26.contains('o28')) b=75
else if (sq26.contains('o29')) b=50
else if (sq26.contains('o30')) b=25
else if (sq26.contains('o31')) b=0
else b = null

if (b!=null)return Math.round(b/20 * 10)/10
else return null
```

11. Click **Add a Score**.



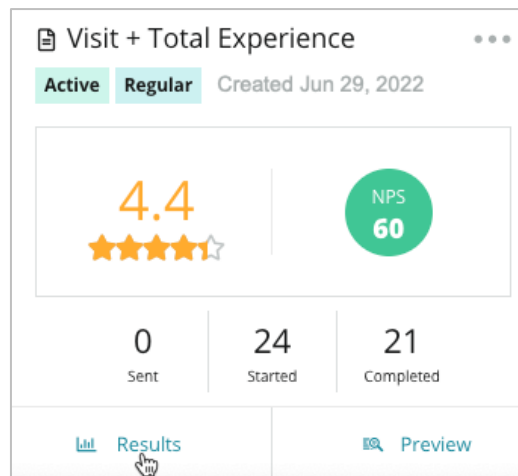
12. Repeat the steps above to create another score for **Staff Superstar**, which averages the **Empathy** and **Communication** scores:

```
if (sq19.contains('o20')) a=100
else if (sq19.contains('o21')) a=75
else if (sq19.contains('o22')) a=50
else if (sq19.contains('o23')) a=25
else if (sq19.contains('o24')) a=0
else a = null
if (sq26.contains('o27')) b=100
else if (sq26.contains('o28')) b=75
else if (sq26.contains('o29')) b=50
else if (sq26.contains('o30')) b=25
else if (sq26.contains('o31')) b=0
else b = null
return ((Math.round((a+b)/20 * 10)/10)/2
```

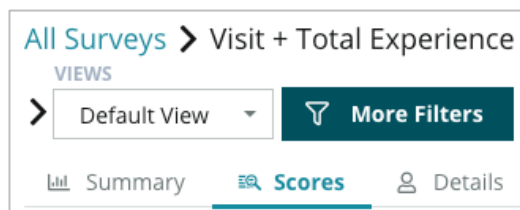
13. Click **Save**.

**Note:** The next time someone completes the survey, score information will be included in the results.

14. Return to the **Surveys > All Surveys** tab and click **Results** under the survey you just modified.



15. Click the **Scores** tab.



**Note:** Locations are ranked according to the scores.

# Review Booster

Generate higher review volumes faster and get chosen at scale.

Review Booster leverages API integrations with top review sites to simplify the process of turning first-party survey feedback into public-facing reviews with one click. If customers choose not to leave their feedback publicly, you can still use that feedback to fuel Google Seller Ratings, Experience Insights, and widgets on your website for a zero-waste outcome.

Review Booster helps your business:

- Increase the volume of feedback received from your customers.
- Deploy feedback to review sites, paid Google ads, or to your own website.
- Drive higher customer conversion rates in your paid advertising efforts.

## Survey Experience

The first step of Review Booster is to deploy surveys to your customers to collect their feedback about your business. Here is an example of what that survey process looks like from the customer's point of view.

### 1. Capture customer feedback.

- At a minimum, the survey captures a rating and comment.
- Surveys can be traditional (deployed via email or SMS) or conversational (SMS only).
- The Terms & Conditions box needs to be checked by the consumer to publish feedback.
- Once submitted, Survey results are available in the Surveys > Results Feed tab as well as available for analysis in the Experience tab.

### 2. Offer to share feedback as a review.

- Configure review site options in the survey design.
- Google, Trip Advisor, and DealerRater are currently available for Review Booster through private APIs.

### 3. Direct customer to the appropriate flow.

Yes (Share Online): If they click yes to share feedback the star rating and comment they already entered in the survey automatically populates in a review box, saving the customer that extra step of retyping their feedback.

- Customer confirms posting of the review.

No (Do Not Share Online): If they choose not to post their feedback as a review, they're taken to a Thank You page and provided with the option to copy their feedback for sharing on additional review sites.

## Put All Feedback to Work

The next step of Review Booster is utilizing all feedback to benefit your business.

If a customer did not choose to share feedback as a review, you can still share through Google Seller Ratings or by streaming to an SEO-enabled survey widget on your website. It will always be available to you internally as well, of course.

### Google Seller Ratings

A Google Seller Rating (GSR) is a Google Ads extension that automatically displays your business's average rating alongside the ad. Google says that ads with GSR achieve a 17-percent higher click-through rate (CTR) than the same ads without ratings. You're not charged for the extension, just for clicks on your ad as Google normally does.

You must be a Google AdWords customer to utilize GSR. Additionally, to have a Seller Rating:

- You must have at least 150 authentic, transaction verified reviews over a rolling 12-month period of time.
- The aggregate score must be greater than 3.5 stars to be shown.
- The review source must be one of around 15-20 Google-approved reviews systems.

### Survey Widgets

Increase visibility of your survey ratings directly on your website. Posting dynamic, criteria-based ratings on your website through survey widgets allows prospective customers to get a snapshot of what other customers are saying about your business.

Streaming first-party surveys can also help your site rank higher in search.

## Getting Started with Review Booster

Onboarding Review Booster is quick and easy! Work with your Implementation Manager or Customer Success Manager to:

- Design your survey.
- Create your survey request template.
- Deploy surveys via the platform: Quick Request, Bulk Upload, Conversational Survey, or Integration
- Design your widget(s) and add to your website

**Note:** Refer to page 45 to learn more about creating survey widgets.

# Responding to Surveys

The Surveys tab displays result from first-party surveys sent by your company.

The **Results Feed** tab allows you to monitor your survey data, as well as manage and respond to survey submissions.

**Heads Up!** Identifying information is necessary for responses. Only surveys containing the respondent's email address and phone numbers, or surveys streamed to a widget can send a reply from the platform.

## Filters

Top line filters affect the data shown on the tab. Secondary filters apply when clicking on interactive chart data.

The tab displays all results from all surveys that have been active during the date range selected. To filter results by survey, use the **Survey Type** filter below the charts.



The image shows a horizontal row of three filter controls. The first control is a dropdown menu labeled 'Survey Type' with a hand cursor icon and a downward arrow. The second control is a dropdown menu labeled 'All' with a downward arrow. The third control is a dropdown menu labeled 'Newest First' with a downward arrow and three dots to its right. The 'Survey Type' dropdown is highlighted with a red rectangular border.

### Filter Surveys to See Only:

- Flagged surveys
- Surveys that have been updated
- Unread surveys
- Surveys that have comments (omit rating only)

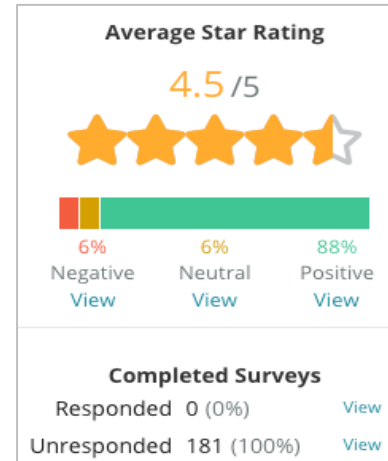
### Sort Surveys By:

- Newest first
- Oldest first
- Positive first
- Negative first
- Word count (ascending order)
- Word count (descending order)

## Average Rating

The Average Rating section contains three main parts. Clicking on any of the links in the Average Rating section filters the graph and the list of results.

- **Star Rating** – The average of all star ratings for the selected filters (total divided by number of items in the selection). Rating scale is 1-5 up to one decimal point. Only surveys with a star rating question are included in this metric.
- **Sentiment** – The percentage of Positive ( $\geq 4$ ), Neutral (3), and Negative ( $\leq 2$ ) surveys
- **Completed Surveys** – The number of surveys that your company has responded to or left unresponded.

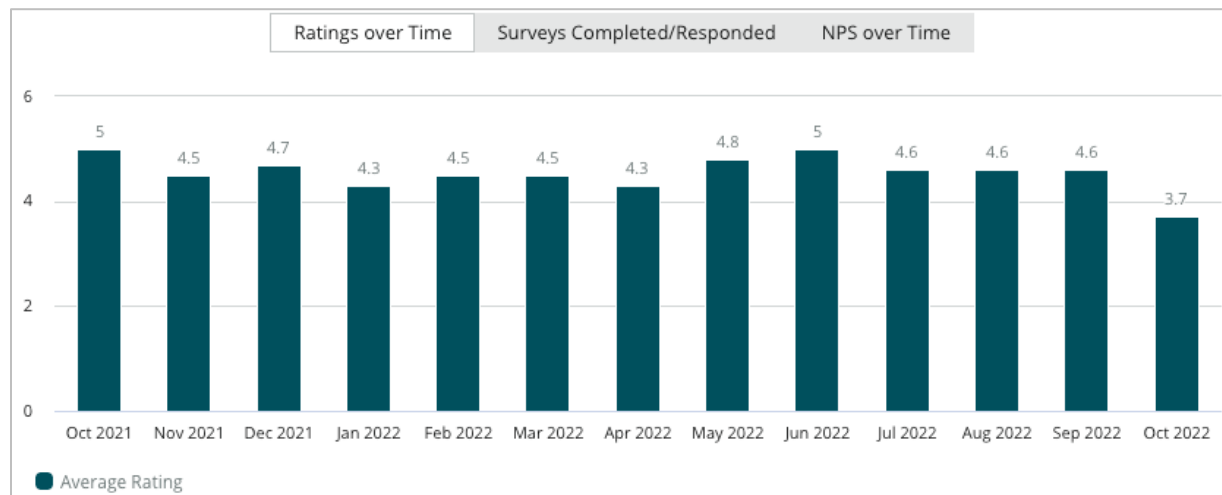


## Charts

The Charts section contains up to three charts. Clicking on any of the bars in the charts section filters the graph and the list of surveys.

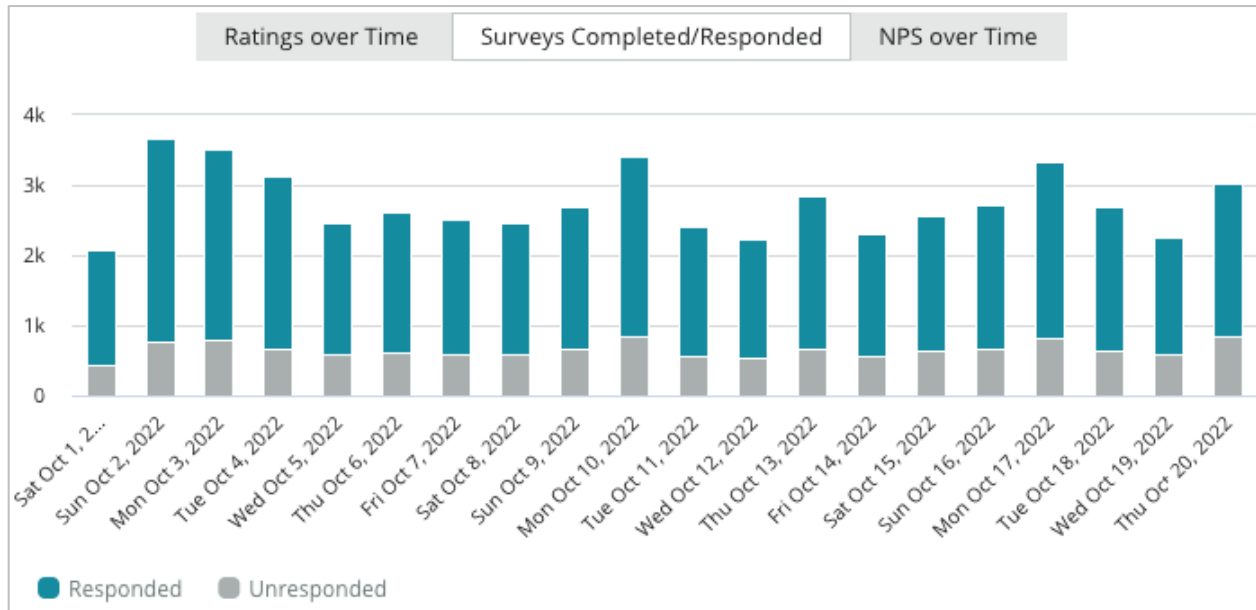
### Ratings over Time

View average rating over the selected time period. Only surveys with a star rating question are included in this metric.



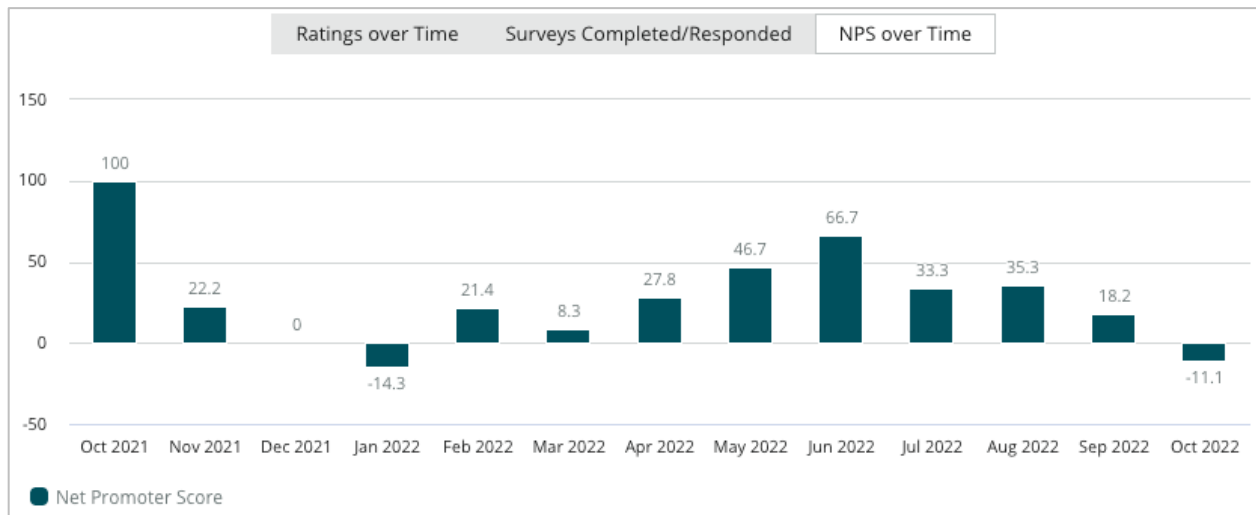
### Surveys Completed/Responded

View total surveys broken down by responded and unresponded over the selected time period.











### NPS over Time

View the NPS score over the selected time period. Only surveys with an NPS question are included in this metric.



## Survey Results

The Surveys section displays all submissions for the selected filters or chart selections. Submissions are shown in near real-time. By default, all submissions are shown and sorted by Newest First. Each review contain the following components:

Item	Description
 Survey	The name of the survey taken.
BDP - Uptown	Location name with which the survey is associated.
 Laura R  	The survey respondent (name and email address or phone number).
 Responded	Response status (if available). Status options include: Read, Flagged, Responded, Forwarded, Shared, or Published. Change a response status by submitting a response (auto) or by manually choosing a status from the ellipses (  ) of the survey.
 10	The respondent's chosen NPS rating. NPS rating is applicable only if the survey includes an NPS question.
 4.0 /5	The respondent's chosen star rating followed by the date the survey was submitted. Star rating is applicable only if the survey includes a rating question.
Oct 24, 2022 Experience at the dealership was fantastic!	The respondent's comments. Comments are applicable only if the survey includes a comments question.
Survey Questions	Other questions and answers from the survey.
<div>Comfort / Attractiveness</div> <div>Professionalism</div> <div>People</div> <div>Staff</div>	Categories that describe the review comments. Categories are automatically applied by the platform's data science engine. The Operations tab uses categories to help provide further insight into your survey results.
<div>Respond to this Survey...</div>	Survey response (if responded to), review response window (if not responded to). Responses are emailed directly to the survey recipient.



## Options for All Surveys

To access additional options, click the ellipses in the top, right corner of the **Results Feed** underneath the charts. Any top-line filters that are currently applied to the data set will persist to all survey options.

**Note:** Operations that take time to process large amounts of data may invoke a pop-up window that allows you to either wait for the operation to continue as a download (must stay on the same screen) or to be notified via email with a link to the download (can move to other screens).

Option	Description
<b>Download PDF</b>	Export the current data set into a PDF report. The Title Page of the report includes your account logo, name of the report (Survey Export), time period selected, and locations selected.
<b>Download CSV</b>	Export the current data set into a CSV format.
<b>Schedule</b>	Create a scheduled report to automatically send an email with the current data set as a PDF or CSV attachment to other users within the platform (individual or role) or email addresses outside the account. Specify a report Name, Frequency, Format, and Message to include in the body of the email. Emails include a link to download the report as well as a link to launch the report within the platform in order to interact with the data and add customizations (available to users with account credentials). You can edit scheduled reports from the Reports tab.
<b>Forward</b>	Send the current data set via email with a PDF or CSV attachment to other users within the platform (individual or role) or email addresses outside the account. Specify a Subject and Message to include in the body of the email. Emails include a link to download the report as well as a link to launch the report within the platform in order to interact with the data and add customizations (available to users with account credentials).

## Responding from the Platform

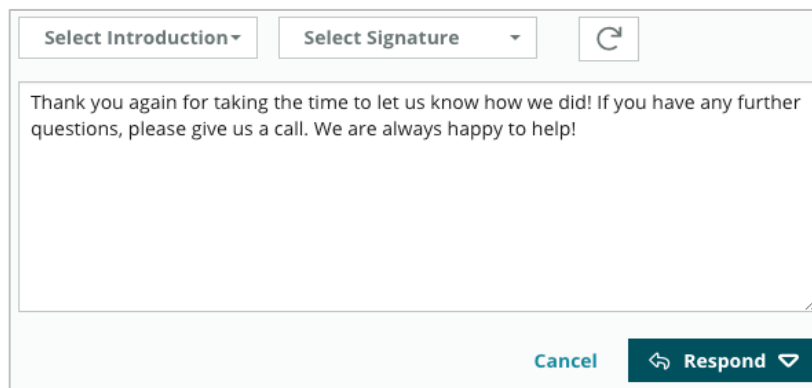
Unless you're publishing your response to a third-party site or onto your website, survey responses are sent directly to the respondent via email or SMS.

**Note:** If customers receive a survey through SMS texting, they can respond to the survey via SMS, as well.

### *To respond to a survey:*

1. Click inside the Survey response window.

The survey area expands with options for Introduction and Signature. These options include starting and closing text using pre-defined templates that help differentiate your responses and allow you to respond more efficiently. Hover over the macro name to see a preview of the text.



The screenshot shows a web interface for responding to a survey. At the top, there are two dropdown menus: 'Select Introduction' and 'Select Signature', followed by a circular refresh icon. Below these is a large text area containing the text: 'Thank you again for taking the time to let us know how we did! If you have any further questions, please give us a call. We are always happy to help!'. At the bottom right of the text area, there is a small icon of a pencil. Below the text area, there are two buttons: a light blue 'Cancel' button and a dark blue 'Respond' button with a right-pointing arrow and a small dropdown arrow.

**Note:** The available templates are managed from the Macros tab in your Admin settings.

2. Choose one or more of the response options, or enter your response directly into the response area. You can edit auto-generated responses before sending.
3. Optionally, check the Private box to keep survey responses offline (not published to widgets on your website). The respondent will still receive your reply via email.
4. Click **Respond**. The response is emailed to the survey respondent. The submission status changes to "Responded."

**Note:** You can also respond to surveys in the **Details** section under **All Surveys**.

# Using Custom URL Parameters

Display metadata in survey result through custom URL parameters.

Use customized URL parameters in query strings to display specific metadata in survey results, reports, and notifications.

A query string allows you to pass information to the Reputation platform by appending variables and values to the end of your Survey URL. This variable and value information show in individual survey results as well as in reports and notifications. You can append one or multiple variables depending on the information you want associated with your survey results.

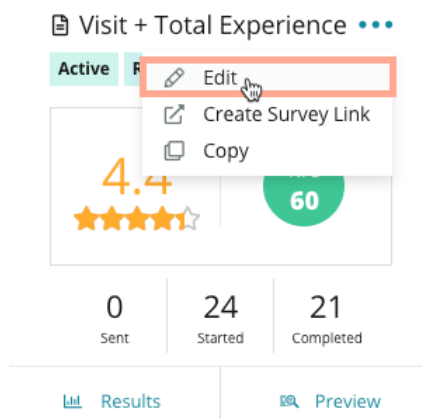
## Custom Parameter Examples

Custom parameters can be used to add descriptive and/or translational data to survey results.

- **Descriptive:** Customer's name, age, hair color, income level, etc.
- **Transactional:** Transaction number, sales/service representative who worked with the customer, type of transaction, VIN number of customer's car, etc.

*To add custom URL parameters:*

1. From the **Surveys > All Surveys** tab, click **Edit** next to the survey you want to apply parameters to.



2. Click **Settings**.



Was this guide helpful? Let us know: <https://bit.ly/rep-guides>

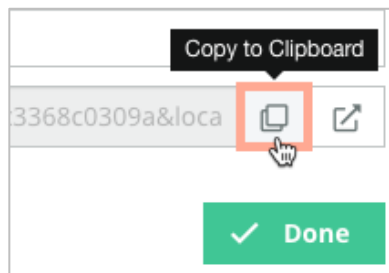
3. Scroll down to the Variables section. Enter the required information:
  - **Variable Name** – The name of the variable that will be used in the integrations or file uploads. This is not visible to the survey taker.
  - **Variable Label** – The name of the variable displayed in survey results, reports, and notifications.
  - **Type** – The type of the variable. Options include: date or text.
  - **PII** – Check this box if the data should be treated as Personal Identifiable Information. PII is masked with asterisks depending on [role permissions](#) to access to PII.
  - **Filter Level** – Determine where variables are displayed. Options include: Primary (displayed at the top level of the Survey pages), Secondary (displayed in report customizations), None.

**Note:** Variables are case-sensitive.

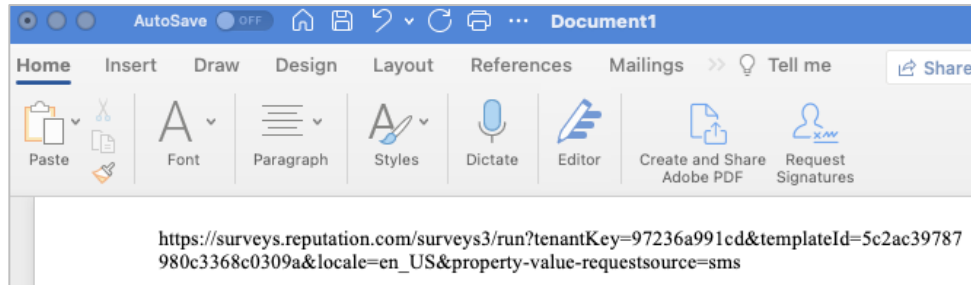
4. Click the **plus** icon when finished.
5. Click **Save**.
6. Click **Save** on your survey.
7. Click **Create Survey Link**.



8. Choose **Corporate** or **Location**. If choosing Location, select a location from the dropdown.
9. Click **Copy to Clipboard**.



10. In a text editor (i.e., Microsoft Word, TextEdit, etc.), paste the survey URL.
11. Add your parameter to the URL in the following format:  
“&property-value-” + <>=value (e.g., &property-value-requestsource=sms)



12. Add the appended survey URL to a request template in the platform or anywhere you choose to request feedback from your customers.

Metadata shows in **Survey Results > Details** as well as in **notifications** that include metadata.

# Creating a Surveys Widget

When survey efforts result in increased volume of positive sentiment, consider creating a Surveys widget to increase visibility of those ratings directly on your website. Posting dynamic, criteria-based ratings on your website allows prospective customers/clients to get a snapshot of what other customers are saying about your business.

**Heads Up!** You must have admin privileges on your account to add or modify widgets. If you need assistance, contact your Customer Success Manager or the Reputation Support Team.

Choose from the following types of survey widgets:

- Reputation NPS Score
- Reputation Survey Summary
- Reputation Surveys 3.0
- Reputation Surveys 3.0 Embedded
- Reputation Surveys 3.0 Feedback Button,
- Reputation Surveys with Sub-Ratings

## *To create a surveys widget:*

1. From the top, right corner of the platform, click **Settings**.
2. From the left navigation, click **Widgets**.
3. Click **Add Widget**.
4. In the **Type** drop-down, click **Reputation Surveys 3.0** (rating summary) or **Reputation Reviews**.

Additional configuration settings appear. As you configure settings, a preview window automatically shows what your settings will look like.

5. Configure the widget settings:
  - **Name** – The name of the widget. (Name will not be visible to customers.)
  - **Level** – Access reviews from all locations (click **Tenant**), or click **Location** to select individual locations from which to pull reviews. Individual locations are useful if you are creating separate widgets for each location's website. Contact your [Customer Success Manager](#) if you need assistance creating location widgets in bulk.
  - **Survey Templates** – Select the check box next to each survey template from which to pull submissions. No results are listed until you specify a Minimum Survey Count.

- **Minimum Survey Count** – If you have more than one survey template selected, specify the minimum number of survey templates to use in the response pool.
- **Trailing Date Limit** – Include survey submissions after a particular time period.
- **Width** – The width in pixels of the widget. Not editable via U/I with SEO-Enabled widgets.
- **Height** – The height in pixels of the widget. Not editable via U/I with SEO-Enabled widgets.
- **Background Color** – Set the background color of the widget. Default is white. Not editable via U/I with SEO-Enabled widgets.
- **Text Color** – Set the font color for the text of the comments. Default is black.
- **Advanced – SEO-Enabled** – Leave this check box cleared to generate the widget code for an iframe. An iframe is the easiest type of widget to implement and maintain. Selecting this check box generates a link instead of code. The link delivers the full HTML of the review stream to your website using a standard style sheet, which your webmaster can override to manage height, width, background color, filters\*, etc. This implementation method may require collaboration with the Product team via your Customer Success Manager.

**Note:** If you want to create a multi-location widget at the tenant level, or if you want to filter widget results by another custom property (brand, market, etc., you can do that by using an SEO-Enabled widget. Add the following parameters to the resulting URL:

**&filterName=location&filterValues=001XXX,002XXX** or  
**&filterName=brand&filterValues=abc.**

The parameters are case-sensitive and must be entered exactly as shown on the **Filters** tab of the account admin page. Spaces in a URL are replaced by %20.

**6. Click Save.**

If using code for an iframe, copy the generated code and send it to your webmaster for placement into the HTML of your website. If using the SEO-Enabled option, curl the URL and to fetch results directly.

Once on your site, the widget dynamically updates with the latest reviews that have met your criteria.

# Premium Paid Services

Put our Premium Paid Services platform experts to work for you.

While we strive to make our platform intuitive and efficient, we understand your time is valuable; resources and bandwidth can be limited. Reputation has a dedicated team of experts ready to help you manage your listings; optimize SEO; and post, publish, and curate your social posts—while also managing your review responses. We can guarantee customer excellence through this suite of value-added services that are fueled by our platform and products. These experts will help you:

- Go Beyond **Accuracy** (Managed Business Listings)
- Maximize the **Appeal** of Your Business Profiles (Managed Services for Google)
- Harness the **Power** of Social Media (Managed Social)
- The Brand That **Cares** the Most, **Wins** (Managed Review Response)

**Note:** While our Premium Paid Services covers many solutions within the Reputation platform, they do not work on Surveys. Reach out to your Account Executive to collaborate with our CX Strategy team on custom surveys.





# Additional Resources

Check out our full set of user guides to learn more about the Reputation platform.

- [Actions](#)
- [Admin](#)
- [Business Listings](#)
- [Customer Journey Insights](#)
- [Dashboards](#)
- [Experience](#)
- [Inbox](#)
- [Mobile App](#)
- [Rep Connect](#)
- [Reports](#)
- [Reputation Score](#)
- [Requesting](#)
- [Reviews](#)
- [Social Listening](#)
- [Social Publish](#)