

GTVO

Using Survey Monkey
Heriot-Watt Branch UCU

Benefits of using a Survey

- You can automate the sending of personalised emails
- Easier for members to respond
- Simple to send follow up emails only to those who have not yet responded
- Easy to keep track of tally
- Filter and export responses

Process

Prepare ballot eligible spreadsheet

Design survey

Import contacts

Design email

Send out survey

+	YES, I have voted	NO, I have not voted yet	I have not received my ballot	No response
	No further contact	Handle any queries	Check preferred address- direct to lost ballot link	
		2 nd survey	2 nd survey	Send survey reminder

Repeat

Prepare ballot eligible spreadsheet

	A	B	C	D
1	First name	Last name	Workplace	Some otl
2	A	Member	SoSS	Blah blah
3	Guevara	Ernesto	EPS	rhubarb i
4	Rosa	Luxemburg	GRID	extranec
5	Boris Pfeffel	Trump	Lyell	hjkgl dah
6	Gertrude Bea Kristol	Himmelfarb	EOB	ghflksagf
7				

- Replace initials with full first name
- Remove middle names
- Check for swapped surname/firstname

Format csv file

- Delete extra rows
- Reorder columns:
 - 1: email,
 - 2: first name,
 - 3: last name
- Remove headers
- Save as CSV file

Create survey

- Page 1 – multiple choice

1. Have you voted in the UCU double ballot?

- Yes, I have voted
- No, I have not voted yet
- I have not received my ballot paper

Page 2 – Yes, I have voted

UCU Ballot, Heriot-Watt

Yes, I have voted

Thank you for confirming that you have voted.

You will not be contacted again for this ballot.

Page 3 – No I have not voted yet

UCU Ballot, Heriot-Watt

No, I have not voted yet

Thank you for letting us know you have not voted yet.

We will contact you again before the end of the ballot to remind you.

2. Is there something we should know? E.g. you have not voted yet because you do not have the necessary information.

Page 4- I have not received my ballot paper

UCU Ballot, Heriot-Watt

I have not received my ballot papers

Thank you for letting us know you have not received your ballot.

If you think you should have received your ballot by now, check your UCU membership and verify your address is correct.

Follow the link to [request a replacement ballot](#).

Set up page skip logic 1

- Hover over the question choices to bring up the logic button (paid version only)

GTVO

Have you voted in the UCU double ballot?

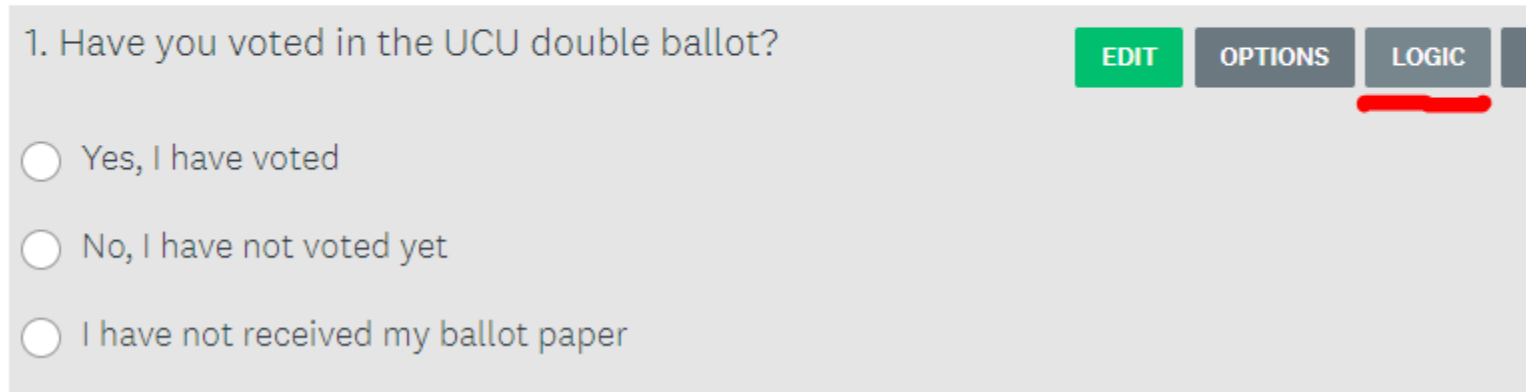
1. Have you voted in the UCU double ballot?

Yes, I have voted

No, I have not voted yet

I have not received my ballot paper



EDIT **OPTIONS** **LOGIC** **M**









A screenshot of a survey question interface. The question is "1. Have you voted in the UCU double ballot?". Below the question are three radio button options: "Yes, I have voted", "No, I have not voted yet", and "I have not received my ballot paper". To the right of the question, there is a menu with four buttons: "EDIT" (green), "OPTIONS" (grey), "LOGIC" (grey with a red underline), and "M" (grey).


Set up page skip logic 2

- Link the responses to the pages

EDIT OPTIONS **LOGIC** MOVE COPY

 Logic applied: Changes to this question will be limited. 

If answer is ... 	Then skip to ... 		
Yes, I have voted	P2: Thank you for voting 	Top of page 	Clear
No, I have not voted yet	P3: No, I have not voted yet 	Top of page 	Clear
I have not received my ballot paper	P4: I have not received my ballot 	Top of page 	Clear

 NEXT QUESTION CANCEL SAVE

Add recipients

- Recipients must be in a csv file
- No headers
- Email address in first column
- First name, last name
- Additional info such as phone numbers for final phase of GTVO

Missing recipients

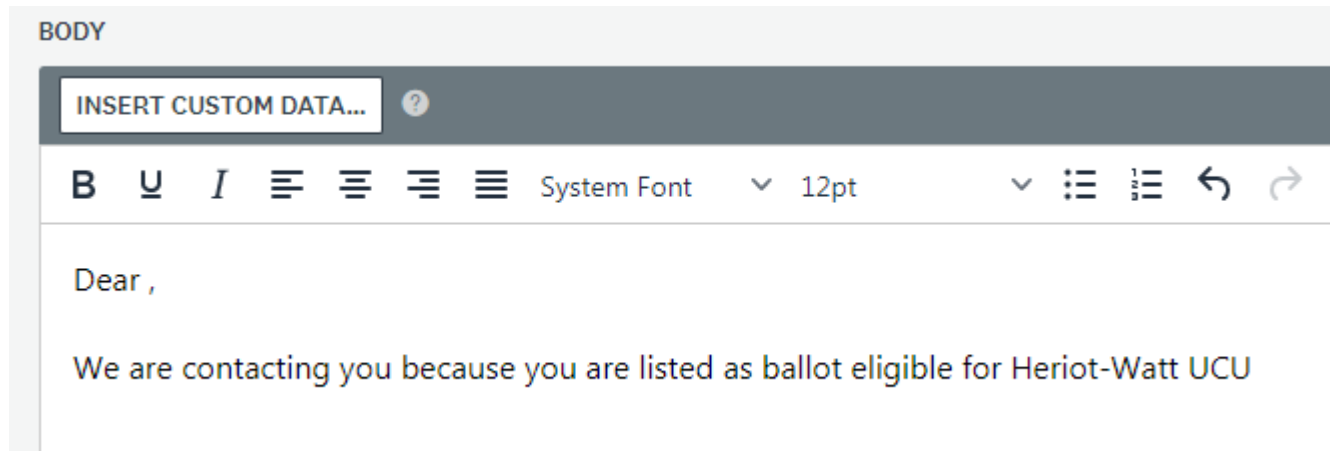
If there are fewer recipients in the survey than in the csv file, this may be because they have blocked SurveyMonkey.

Email these members separately and collate in your master spreadsheet.

At Heriot-Watt this was ~5% of membership.

Compose your email

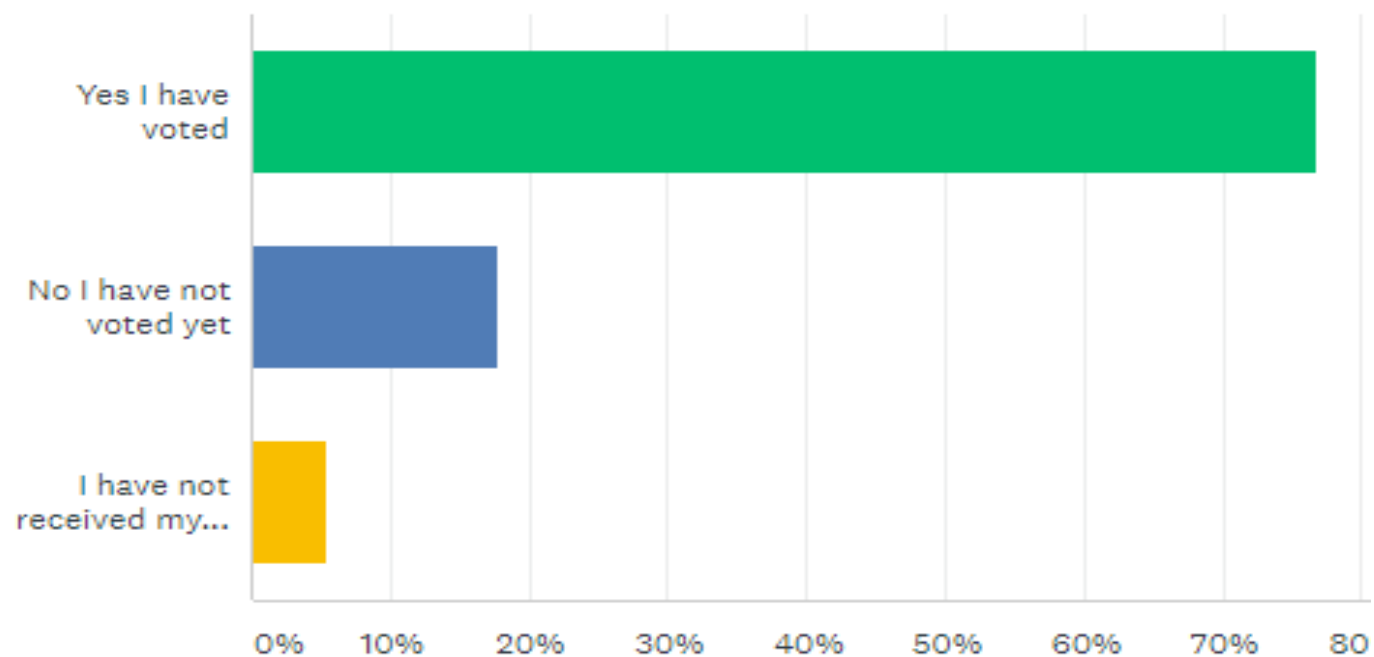
- Use Insert Custom Data button to add member name to email
- Edit the default email to add information about the ballot



The results

Have you voted in the UCU double ballot?

Answered: 129 Skipped: 0



Filter responses (Analyze results)

- You can create rules to filter responses to e.g.
 - e.g. export a csv file of individuals who answered I have lost my ballot paper. We check their preferred address and contact them to check they have requested a new ballot.
 - Export a list of those who answered No so they can be surveyed again.
- Combine filter and show so you can see any additional information provided by those who say No, they have not voted e.g.
 - Members have asked for more info- we contact them individually
 - Members let us know they are on holiday and when they will vote.

(We use VSLOOKUP to combine different spreadsheets)

Send reminders

With Survey Monkey you can easily send reminders to members who have not responded to the survey.

- Customise the reminder email.
- Edit recipient list to remove members who have left or who contacted you outside the survey.

Keep pushing till the end of the ballot

Using Survey Monkey will not increase Branch turnout but based on our experience it makes it easier for members to keep the Branch updated.

It simplifies the process of collating information so you can target GTVO efforts to members who have not yet confirmed their vote.

