Quick Start Guide

Deploying a Questionnaire

Spark

Quick-start Guide: Deploying a Questionnaire

Introduction

There are two main uses for Questionnaires created in Portrait Dialogue:

1. For customer service staff to use when talking to a customer over the phone. This is executed internally via the Telemarketing operation, or
2. For customers to complete the Questionnaire externally – i.e. online

This Quick-start Guide will take you through, step-by-step, the actions required to deploy a Questionnaire for both of the above mentioned uses. The Guide is intended for users that are already familiar with creating Questionnaires and follows on from the Quick-start Guide to creating Questionnaires.

Good luck, have fun and remember if you get stuck or have any questions you can always email Sarah at Spark – sjfowler@spark.com.au

## USE 1: DEPLOYING QUESTIONNAIRE IN A TELEMARKETING PROJECT

When a Questionnaire is deployed in a Telemarketing Project it is used primarily by your internal customer service staff. For example, a Dialogue where customers have received a promotional email and need a follow-up phone call from a Customer Service rep. In this case, the Questionnaire can provide scripting for staff as well as collect important customer information.

## Stage 1: Create a new Telemarketing Project

1. Open the Dialogue file you need the Questionnaire to be attached to – example pictured below.
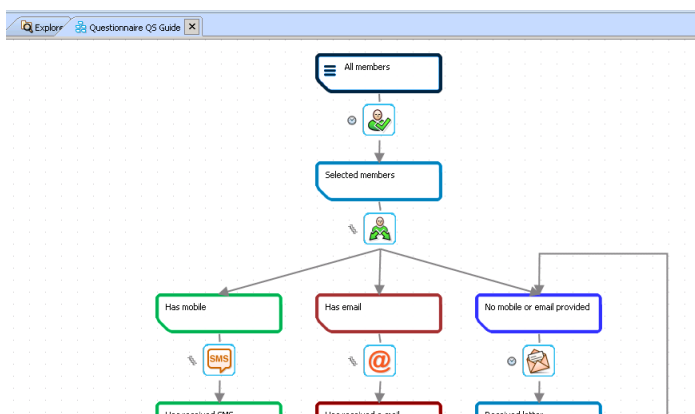
2. Go to the 'Design' tab and click on 'Telemarketing Projects' button to create a new Telemarketing Project file – pictured below.
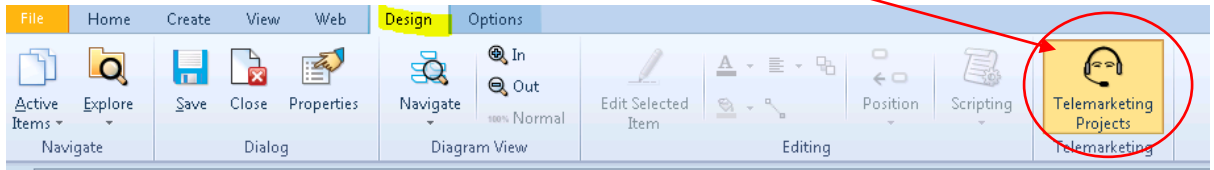
3. In the next window that pops up, click 'New'. Another window will pop up – simply click 'Finish'. Both windows pictured below.
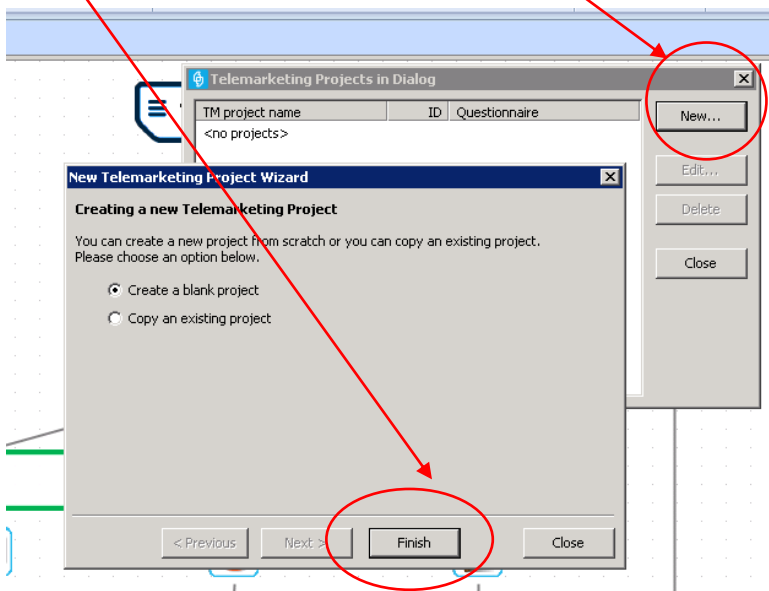
4. You are now presented with the Telemarketing Project Properties window. Go through and complete the fields as pictured below, then click 'OK'.

Give your project a name

Add a description here

Select a Questionnaire that you will have already created from this drop down field

Select a Layout from this drop down field - *(this is the Layout you created when you created the questionnaire)*

Check this box so you can track your response data for reporting purposes

Give your project start and end dates

Telemarketing Project Properties

Telemarketing project name

Quick Start Survey

Description

Sample questionnaire for QS guide

| General | Operators | Call rules | Activity setup | Advanced |

Questionnaire

quest_sample

Layout

Quick Start Guide Questionnaire

☑ Enable response tracking

☐ Show customer data

☐ Allow update of customer data

Project start date   Project end date

27/03/2015   30/06/2015

Help   OK   Cancel

5. Your first window will now have your newly created Telemarketing Project listed – pictured below. Simply click 'Close' to finalise.

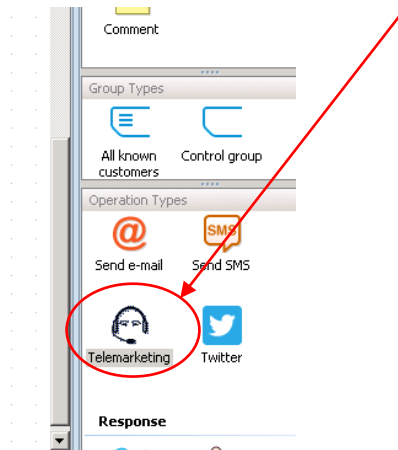**Telemarketing Projects in Dialog**

TM project name	ID	Questionnaire
Quick Start Survey	1031	quest_sample

New...

Edit...

Delete

Close

Stage 2: Linking the Telemarketing Project (and Questionnaire) to your Dialogue

1. You should still be in the Dialogue file that you opened to create the Telemarketing Project. From here, click on the 'Telemarketing' Operation Type from your Toolbox window on the right-hand side of the screen - pictured below.

2. In your Dialogue canvas area click, hold and drag your cursor downwards from the member group you require to be processed through the Telemarketing operation. Example picture below. A Telemarketing Properties window will then pop up.
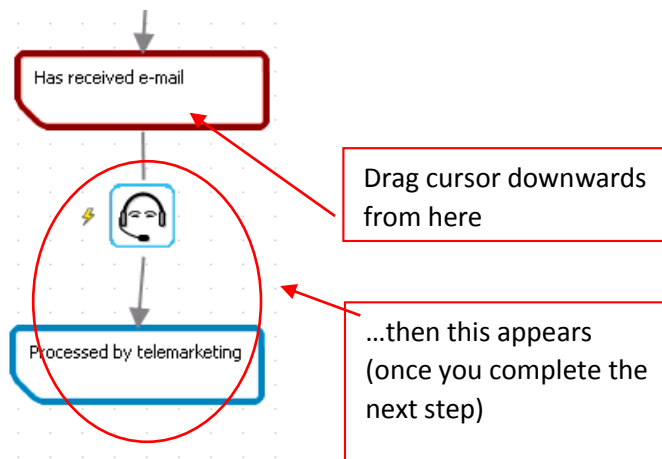
3. On this Properties screen, select the Telemarketing project you just created from the drop down menu – picture below. Then check the 'Is active' box to activate the operation in the Dialogue. Leave all other fields as they are and click 'OK'.

Your Questionnaire has now been applied to your Dialogue via a Telemarketing Project. When your Dialogue becomes live, members who move through the Telemarketing Project (are spoken to on the phone) will be processed through your Questionnaire.

Well done!

USE 2: DEPLOYING THE QUESTIONNAIRE ONLINE VIA A CUSTOMER ACCESSED WEBPAGE

When a Questionnaire is deployed online it is primarily used by your external customers. Portrait Dialogue has a Customer Web Access module which enables the questionnaire to be available to end-customers through a browser-independent web interface (online). Customers are given a unique URL to access the Questionnaire online – usually via eDM or SMS.

Stage 1: Build a URL for the Questionnaire

1. In the Explorer tab, select the folder containing the Dialogue file and new Questionnaire file that you recently created.

    Then right-click on the Questionnaire file and select 'Build questionnaire URL…'
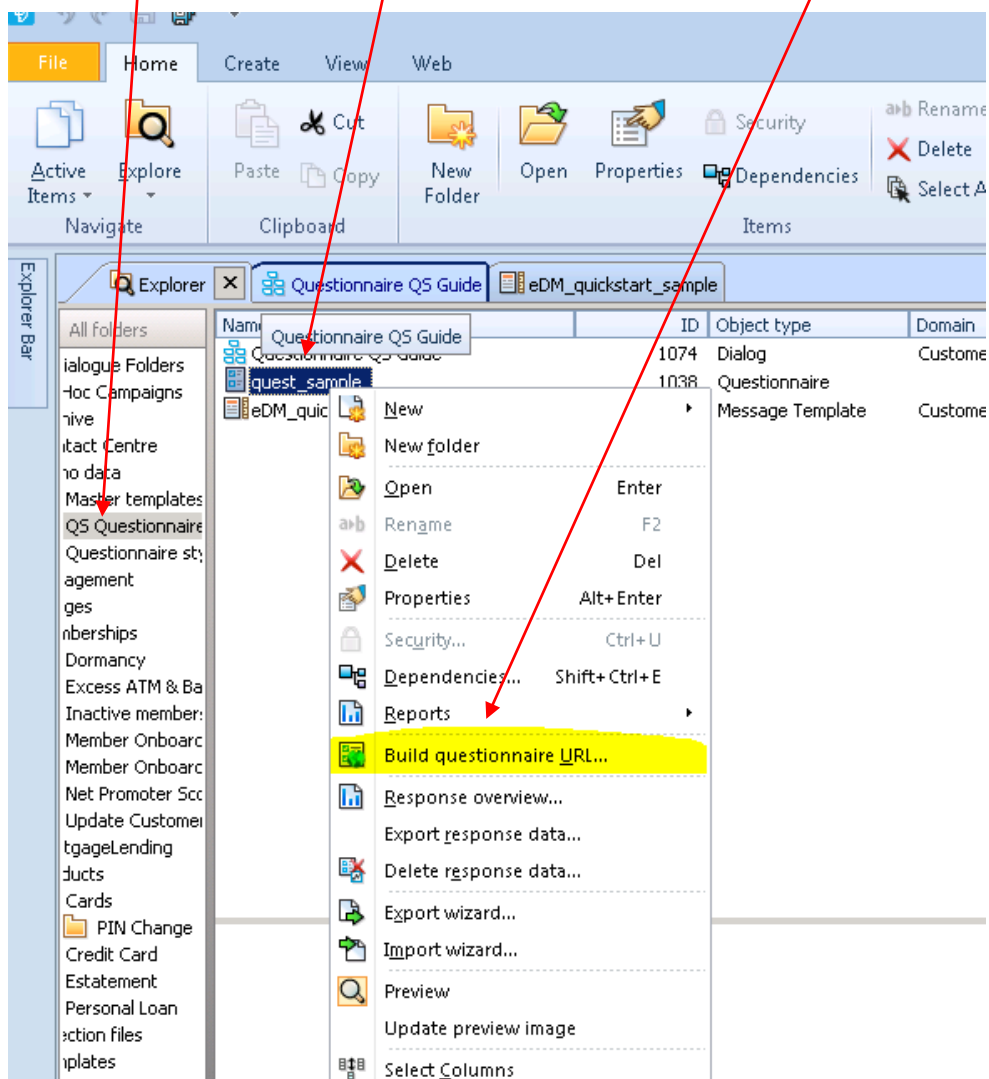
2. In the window that pops up – pictured below – make sure the correct Questionnaire has been selected, then select the Layout you used when you created it. Leave all other fields as they are and click 'OK'.
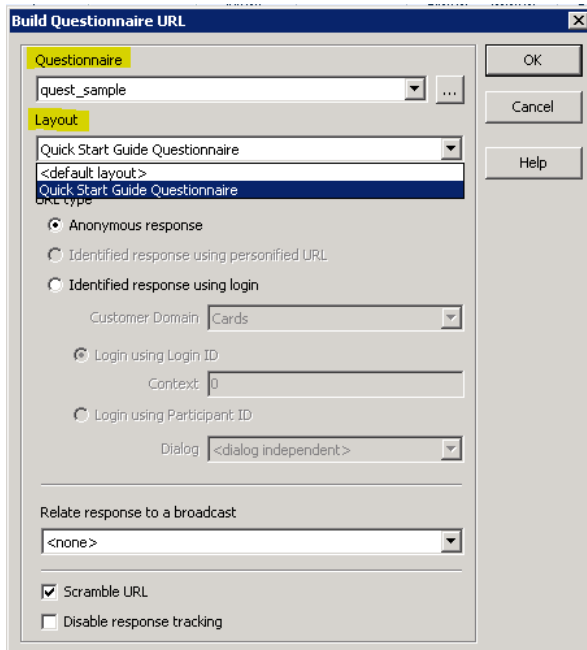

3. Simply click 'OK' on the window that pops up next – pictured below. It is a confirmation window that automatically copies the newly created URL – ready for you to paste!
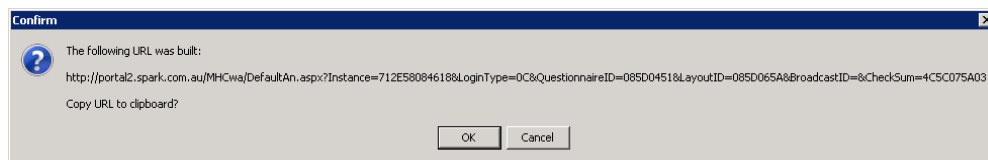

Stage 2: Pasting URL in Communication Material

1. The most common method of providing access to the online Questionnaire is via an email. The first step is to open the email file and highlight the text (it could also be an image if you wish) that you want to link the URL to. Example pictured below.
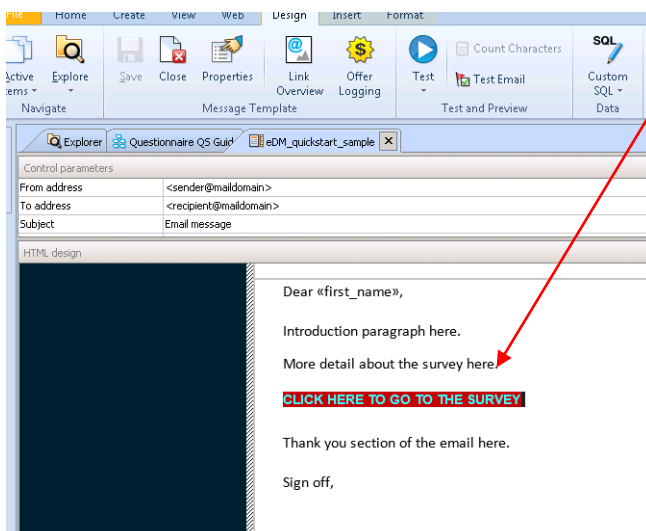
2. Next go to the 'Insert' tab in the top navigation bar and click on the 'Hyperlink' button – pictured below.
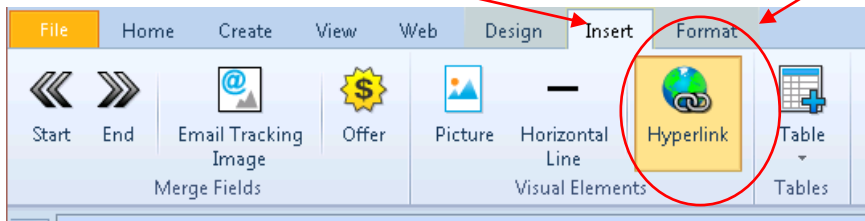
3. You are now presented with the Hyperlink properties window. Go through and complete the fields as pictured below, then click 'OK'.

Select the 'http:' option

Paste the URL you just built in this field. Ensure you delete anything that was automatically put there – i.e. 'http://'

Check both of these boxes

Give the hyperlink a name to aid future reporting. *(You do not need to select one from the drop-down menu – you can just type in a new one)*

4. If you hyperlinked text (not an image), you may notice that your text formatting has changed. This can be easily fixed by going to the 'Format' tab in the top navigation bar and changing the font settings – pictured below.
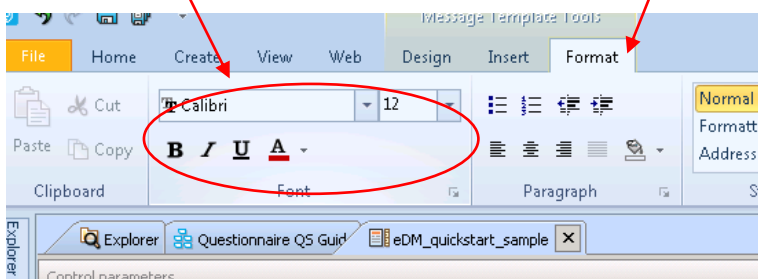
You can now send an email to test the new link and view the Questionnaire online – as your recipient would view it. *Note – if sending the email through Testing mode, the hyperlinks will not work.* You need to enter your address in the email setting – pictured below.
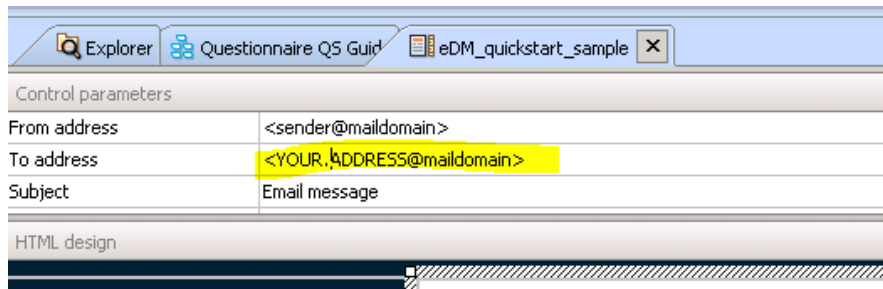
5. Once you send the email to your recipients they will be able to complete your questionnaire online. That's it!

CONGRATULATIONS! You have now deployed your first Questionnaire.