Setting Up an Event Using Surveys

2016

Contents

1. INTRODUCTION

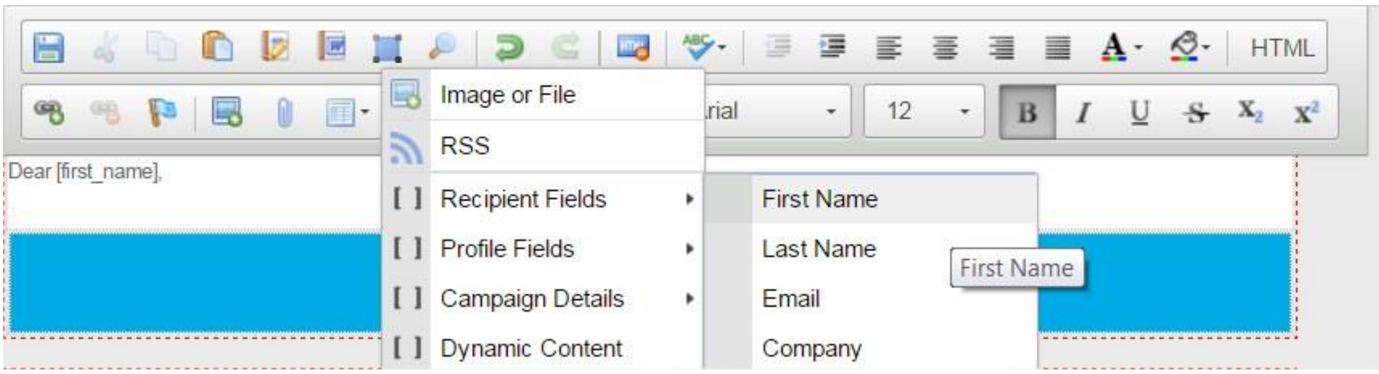
Using Concep Send it is a simple process to manage your event RSVP process which includes your invitation, registration form and confirmation emails. You can also include Save the Date, Reminder to Register, Reminder to Attend, and post event feedback campaigns. This document shall guide you through.

2. CONFIRMATION EMAIL

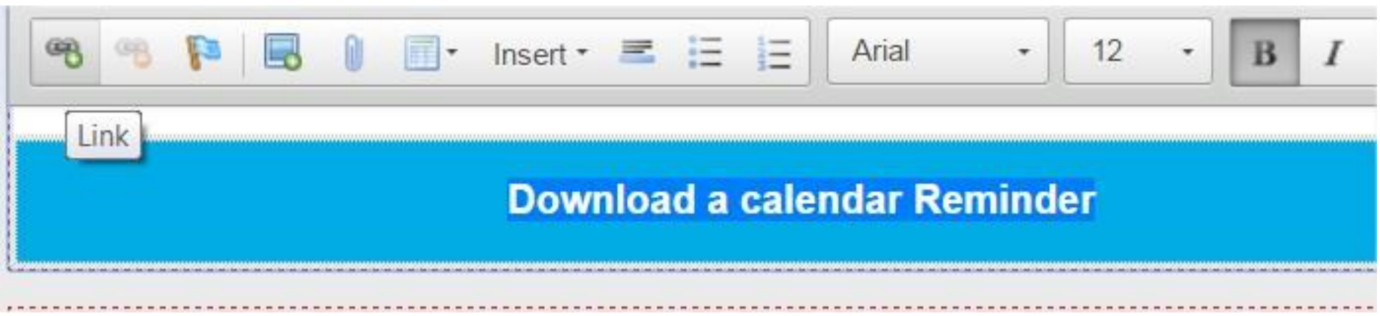
It may seem counter intuitive to start with your confirmation email but if you want to streamline the event creation process, it is best to start here.

Your confirmation email should be personalised and should include all relevant event details, including a link for recipients to download a calendar reminder for the event.

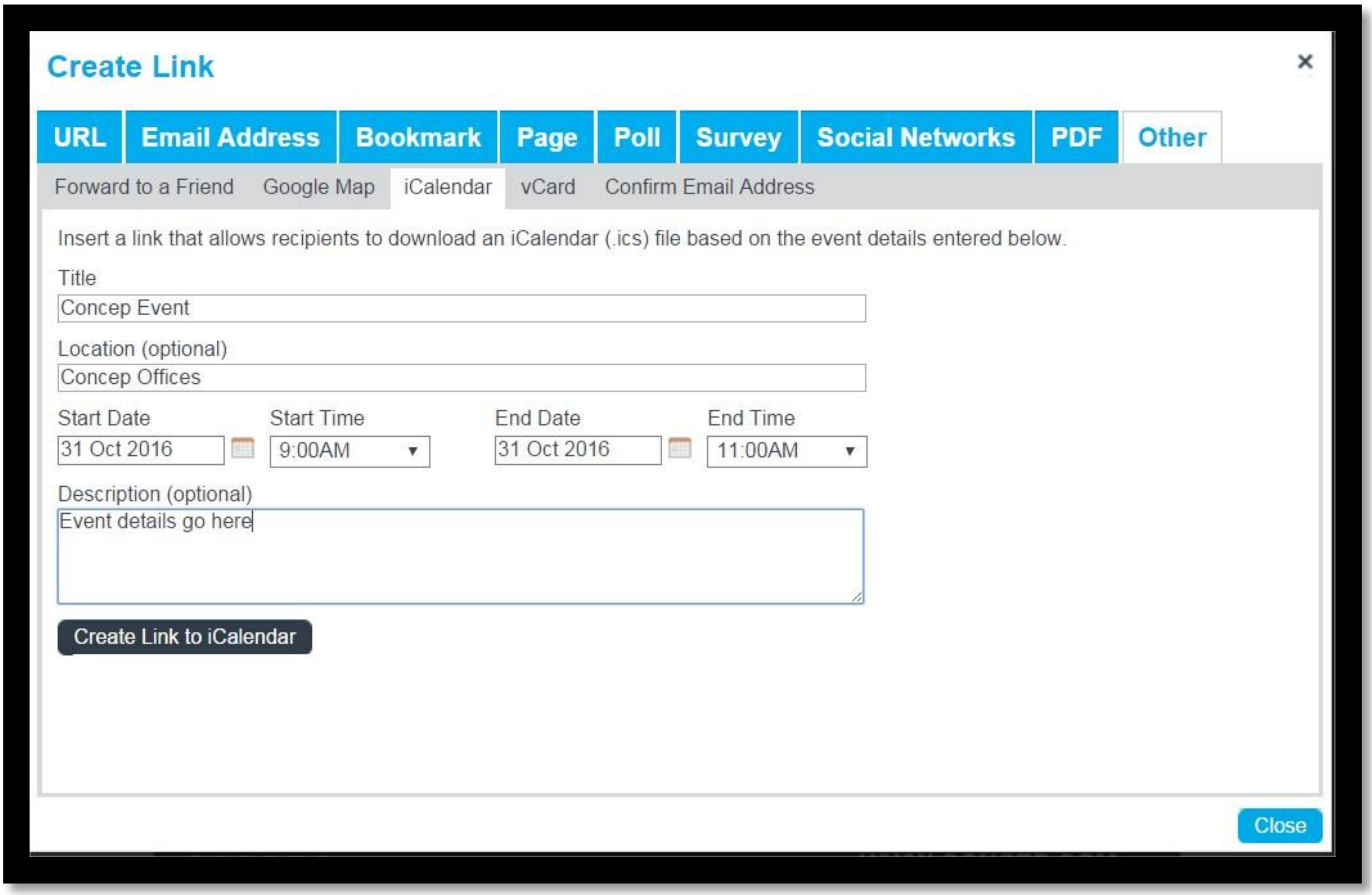
To personalise the confirmation email, you will need to use the mail merge field within the editor toolbar to insert your contacts' personal details.



To create a calendar reminder for your registrants to download, you need insert the appropriate text into the email body, highlight that text and click the "Create Link" icon on your toolbar.



Once the linking interface pops up, you click the "Other" tab and then select the "iCalendar" option from the navigation bar. This will bring up a new interface where you insert the event details such as name, date, time and any details you want to include in the body of the reminder in the recipient's calendar.



Once you have input all of the event details, click the “Create Link to iCalendar” button and your reminder will be inserted into the campaign. This reminder is inbox neutral which means it will work across a variety of inboxes from Outlook to Lotus Notes and Gmail.

When you have finalised and approved all content in the confirmation email, send the campaign to yourself so that it is in your “sent” campaigns listing and you are ready for the next step.

3. MANAGE CONTACTS

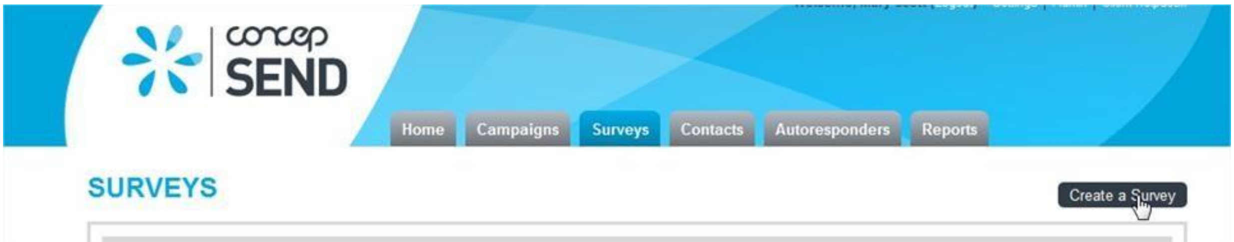
Next you want to click into the “Contacts” section of Send and click to “Add Group” from the navigation bar.

You will want to create two new groups, one for contacts who will attend and one for contacts who will not be able to attend.

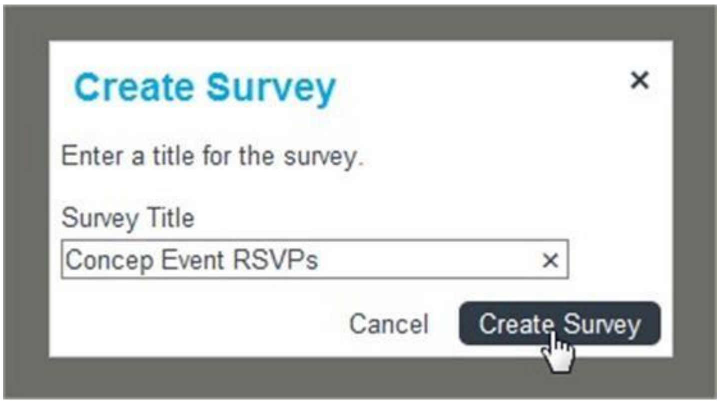
Once both groups have been inserted into the account, you are ready for the next step.

4. REGISTRATION FORM

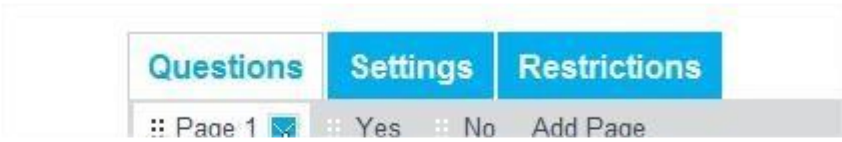
To create your registration form you will need to click into the “Surveys” section of Concep Send using the navigation tab along the top of your Send home screen. Once there, you can either click the “Create a Survey” button on the top right side of your screen or select an existing template.



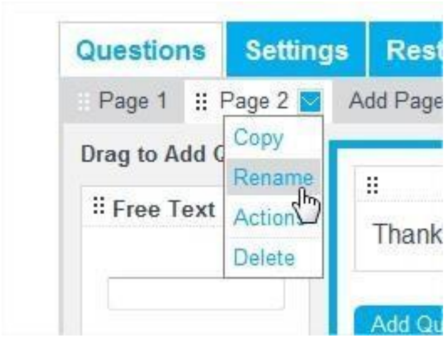
You will then be asked to name the survey and click to create the survey.



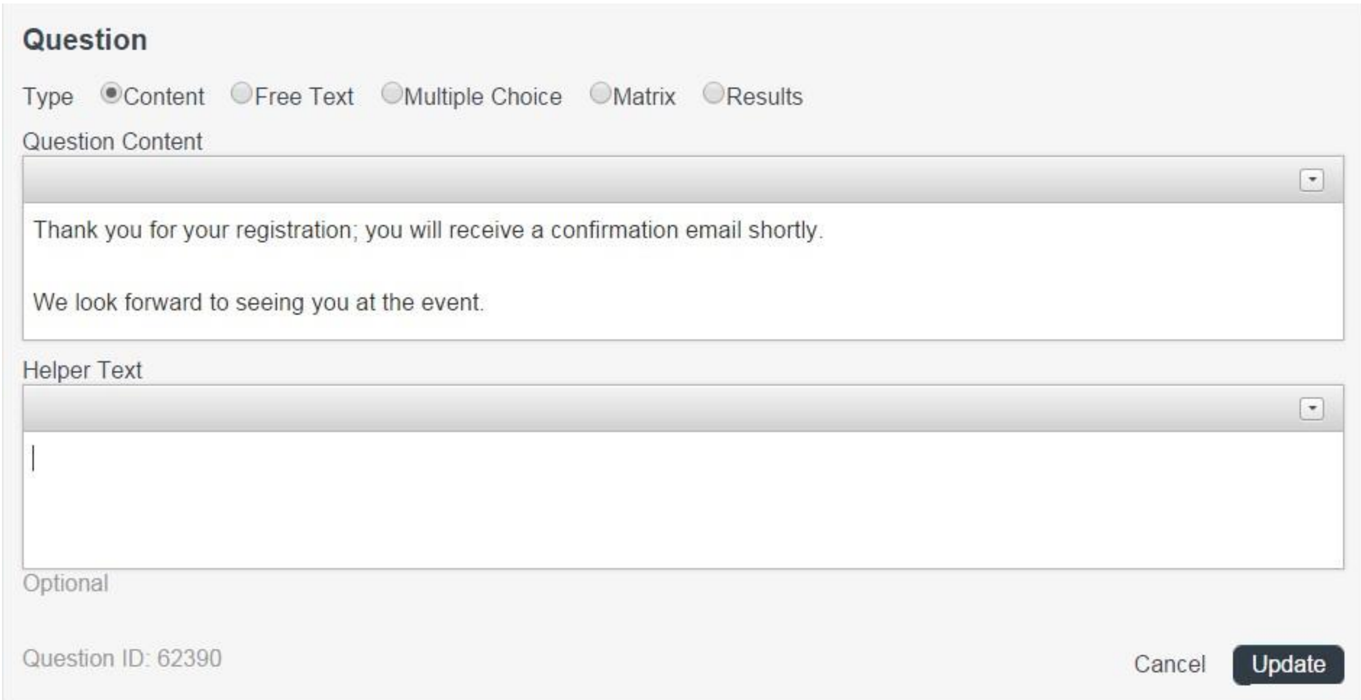
When you click to “Create a Survey” a new interface will appear which has several default questions and two pages that you will want to update to match your specific event. There are also three tabs, Content, Settings and Restrictions, that you will want to work through to customize this survey for your event.



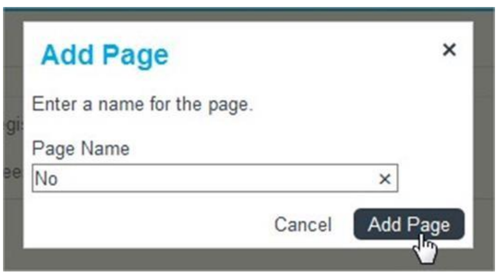
The first step will be to rename the second page of your survey by clicking the blue arrow icon to the right of the Page 2 text. Select the rename option from the provided options and name your page “Yes”.



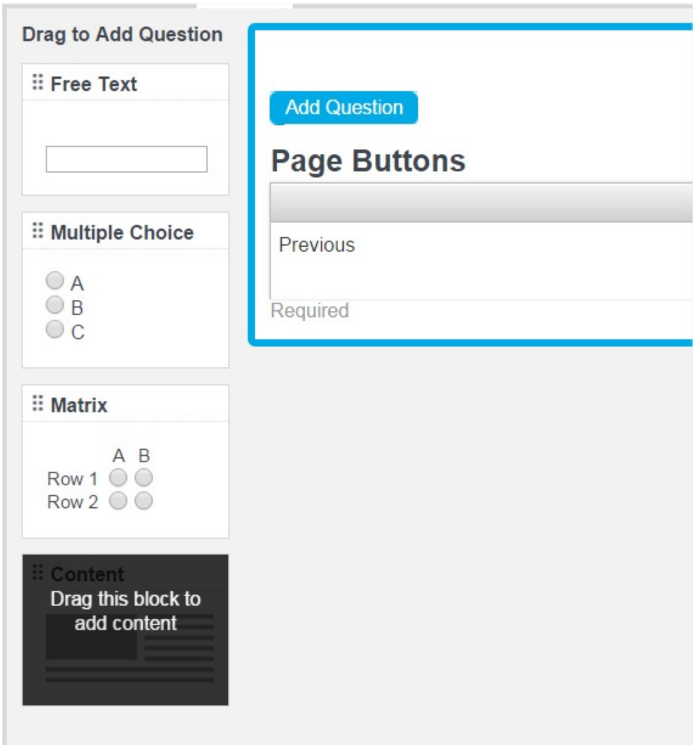
Click into the area where it currently says “Thank You” and input the text you want to display to contacts that are able to attend your event.



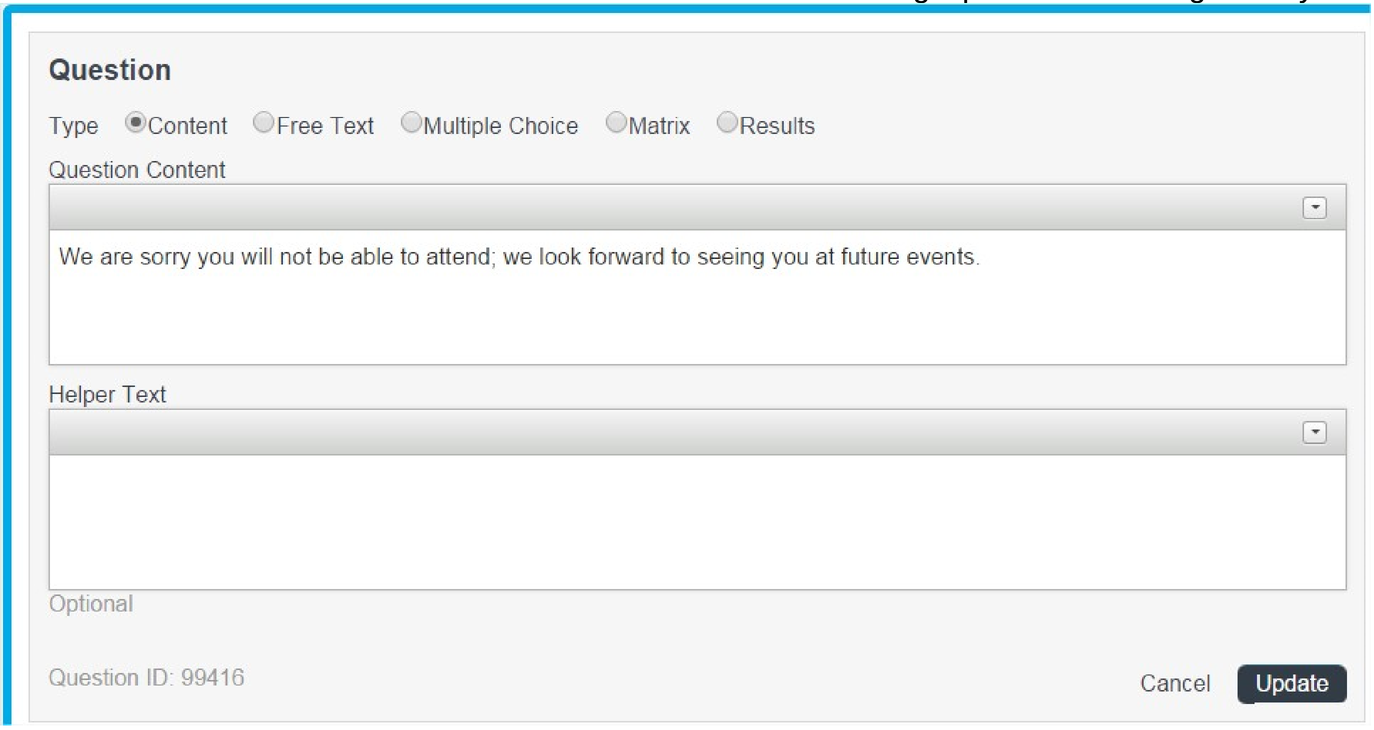
Next, click to “Add Page” and name the new page “No”.



Since this is a new page, there will be no question fields so you need to either click the "Add question" button which will bring up an editable field or you can "drag and drop" the content type from the listing along the left side of the frame into the survey field.



If you choose to click the "Add Question" button, you will want to leave the question type as "Content" and input the text you want to display to those contacts that are unable to attend the event. If you "drag and drop" the question type, an editable field will automatically appear into which you will insert your content.



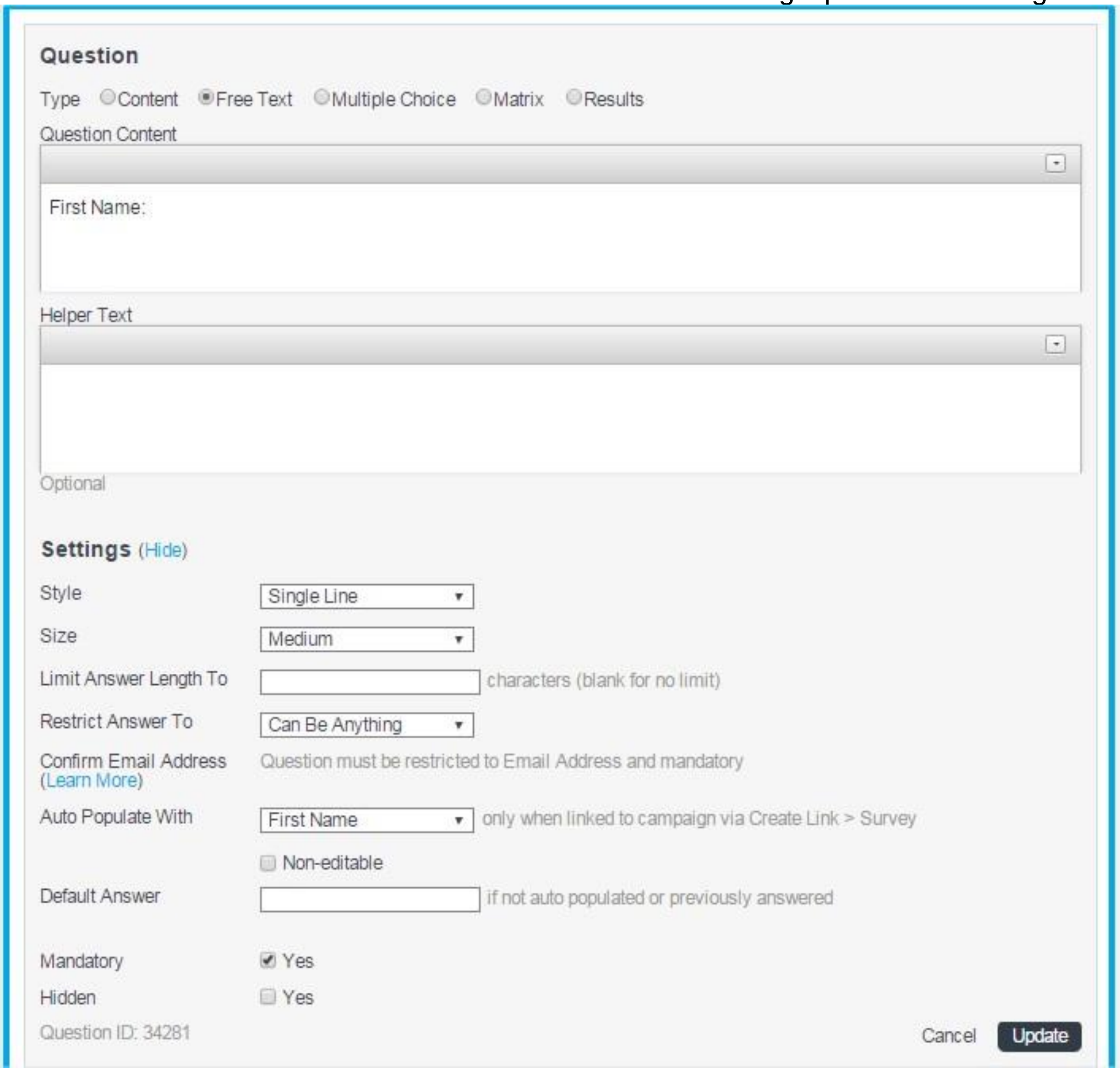
You will then need to click into Page 1 of your survey and enter the questions you want your registrants to answer in order to confirm their registration. In order to send a confirmation page, you will need to collect at least the registrants First Name, Last Name, and Email Address via free text questions.

As when you created the new page, you can choose to either use the “Add question” button, “drag and drop” the question type into the survey” or edit the existing default questions so as to collect the necessary information.

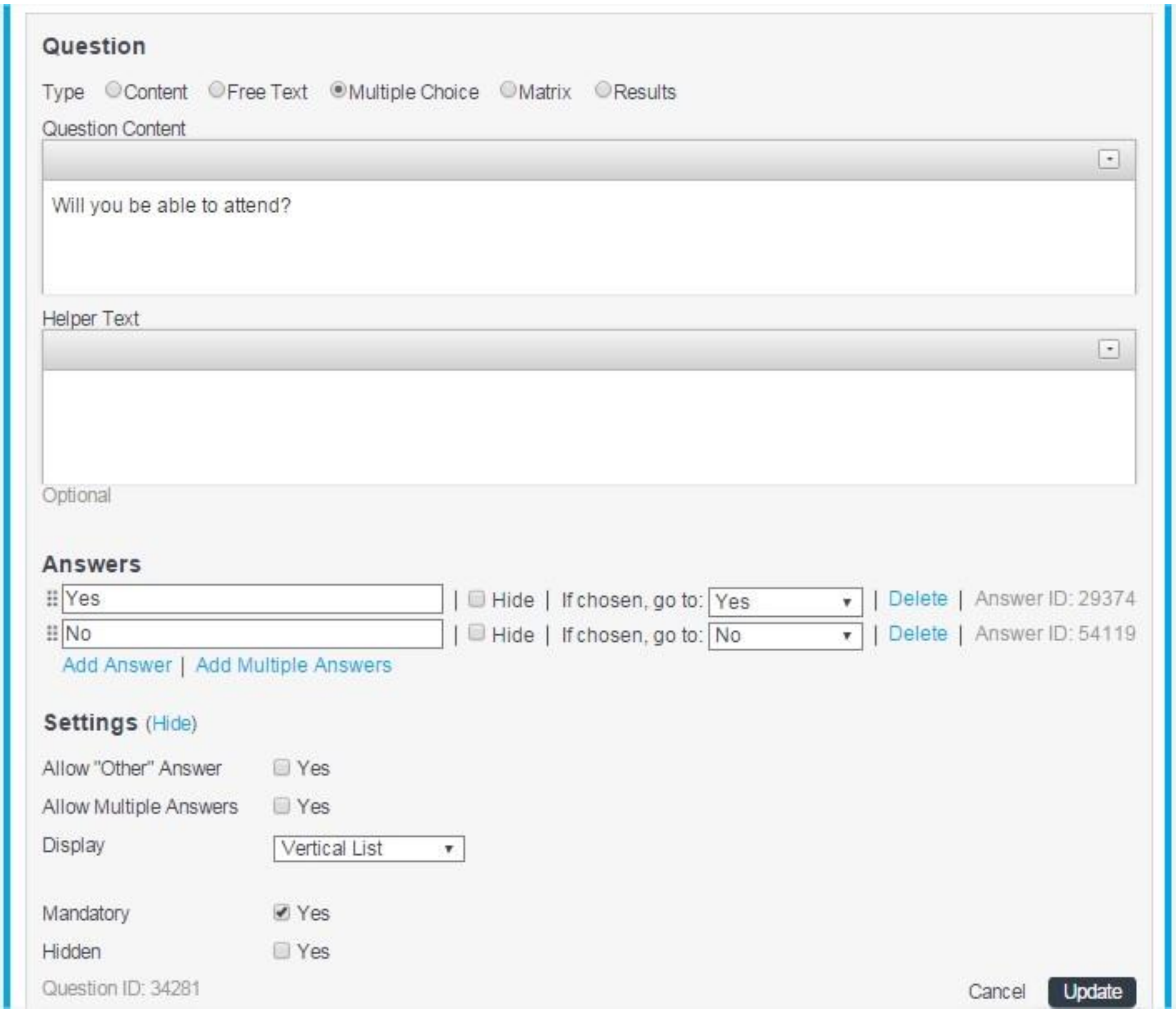
When setting up a free text question, you need to click to “Show” the settings of the question type in order to format how you want the question to display to responders. You can then decide the type of free text question you want to ask (single or multi line) and the size of the free text box into which responders will input their answers.

You can also choose to limit the number of characters an answer can be, the type of answer a responder can input (email address, URL, date, number, value from a list) and whether or not you want the text box to prepopulate from information already stored in the contact record.

You will also need to decide if you want to make the question mandatory for all responders to attend by ticking the “Mandatory” box.


Question
Type Content Free Text Multiple Choice Matrix Results
Question Content
First Name:
Helper Text
Optional
Settings (Hide)
Style Single Line
Size Medium
Limit Answer Length To characters (blank for no limit)
Restrict Answer To Can Be Anything
Confirm Email Address (Learn More) Question must be restricted to Email Address and mandatory
Auto Populate With First Name only when linked to campaign via Create Link > Survey
Non-editable
Default Answer if not auto populated or previously answered
Mandatory Yes
Hidden Yes
Question ID: 34281
Cancel
Update

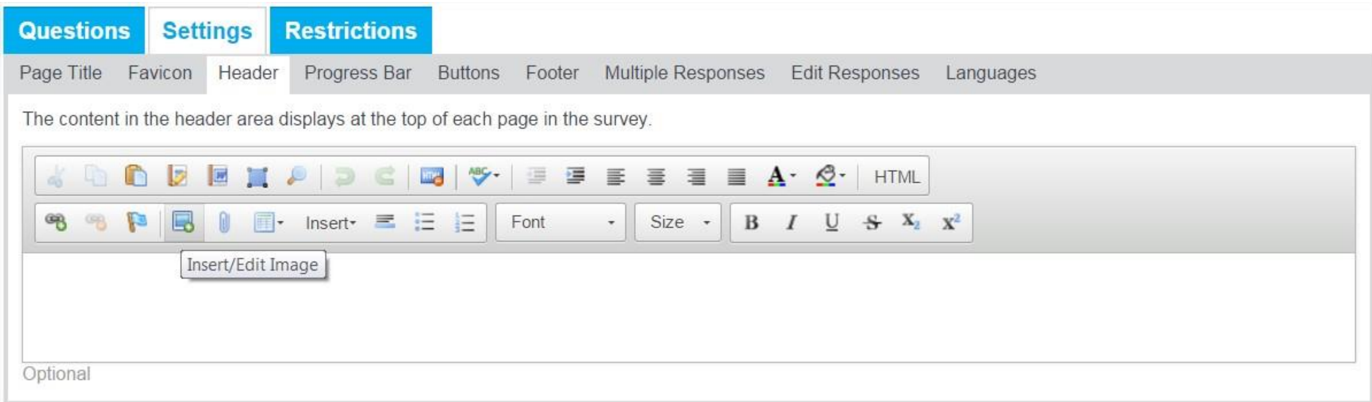
You will also need to include a multiple choice question asking contacts if they are able to attend the event. When inputting your answers to this question, you can direct contacts to the designated Yes or No page by using the drop down menu to the right of the question field.



Once you have set up questions for all of the information you want to collect from your responders, click to Save the questions and move on to the Settings tab. Under Settings, you will be able to name your survey for your specific event, add headers and footer images or text as well as determine if you want to use a progress bar so respondents can see where they are in the registration process. This is also where you will determine if responders can edit their responses or if they can register a colleague for the same event.

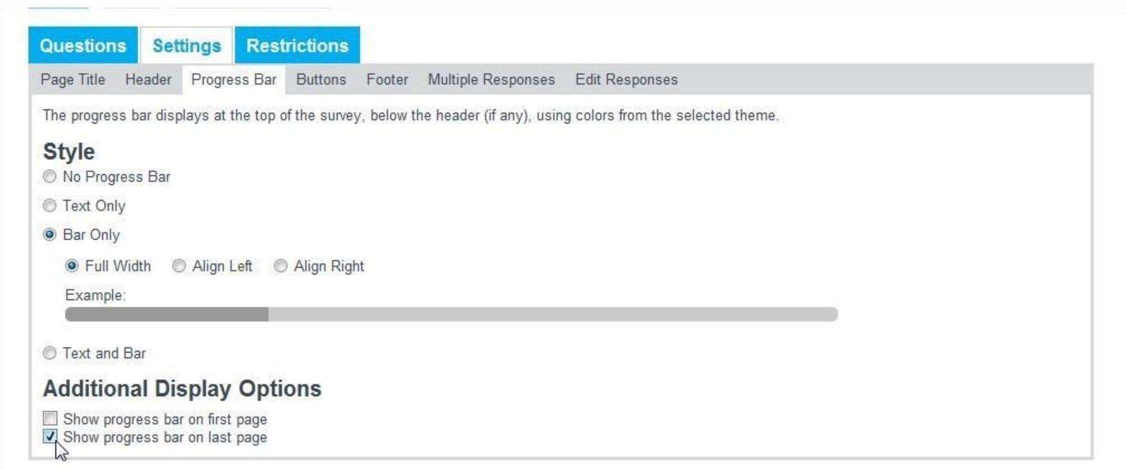
The first option under Settings will ask you to name your survey. This is the name that will appear in the browser tab when a respondant completes the registration so you can make this as specific or general as you like.

The second option is for the survey header, which would be a banner or text you want to include on all pages of the survey. To do this, click into the header section and click the “Insert/Edit Image” icon from the editor bar. Once the content library interface comes up, click to use the banner image that matches the event you are working on.

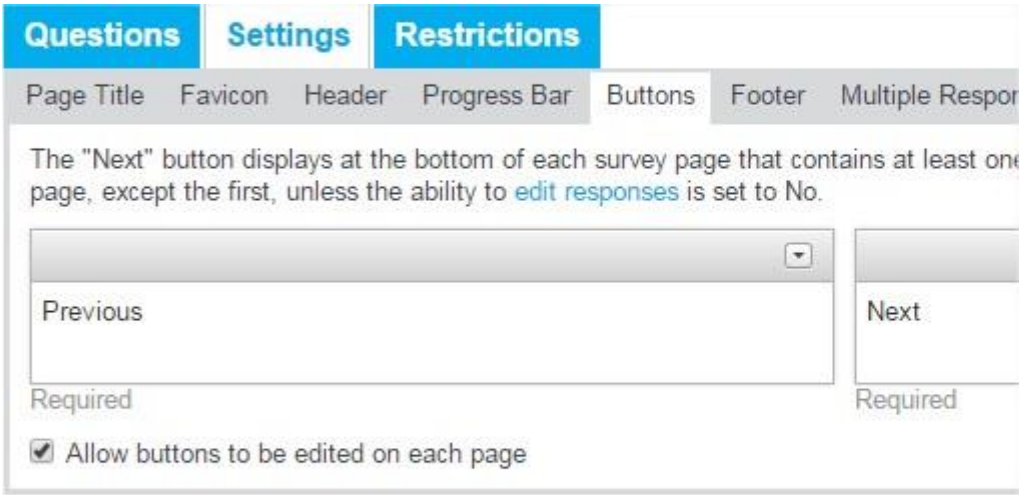


If you wish to include a footer message or image, you would simply click into the Footer option and add the text you want to include or insert an image in the same way you did for the header.

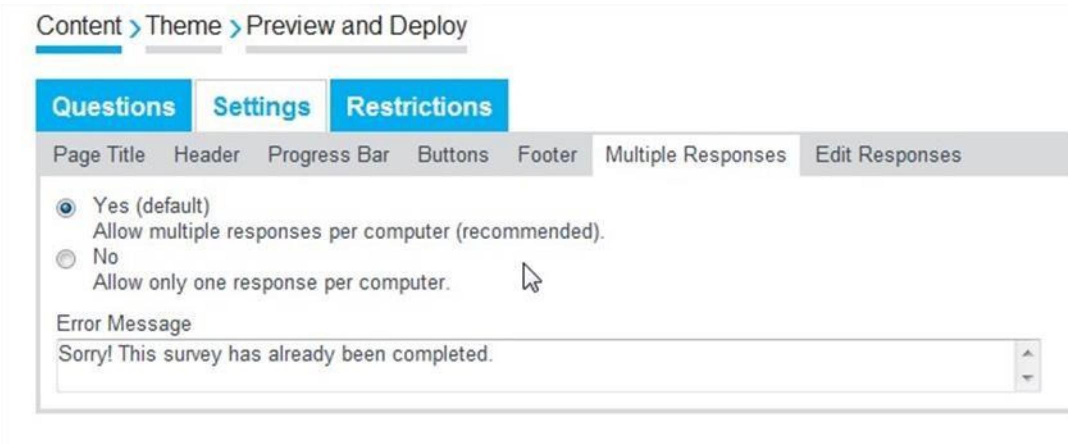
If you are having a more complex event, you can include a progress bar that responders will see when filling out their registration. You will have the option to have a bar and text, just text or just a bar appear. You will also need to determine if you want the progress bar to appear on the front and last pages of the survey. If you do not want the bar to appear on the first or last page, you will need to untick the boxes provided as the default is for the bar to appear on all pages.



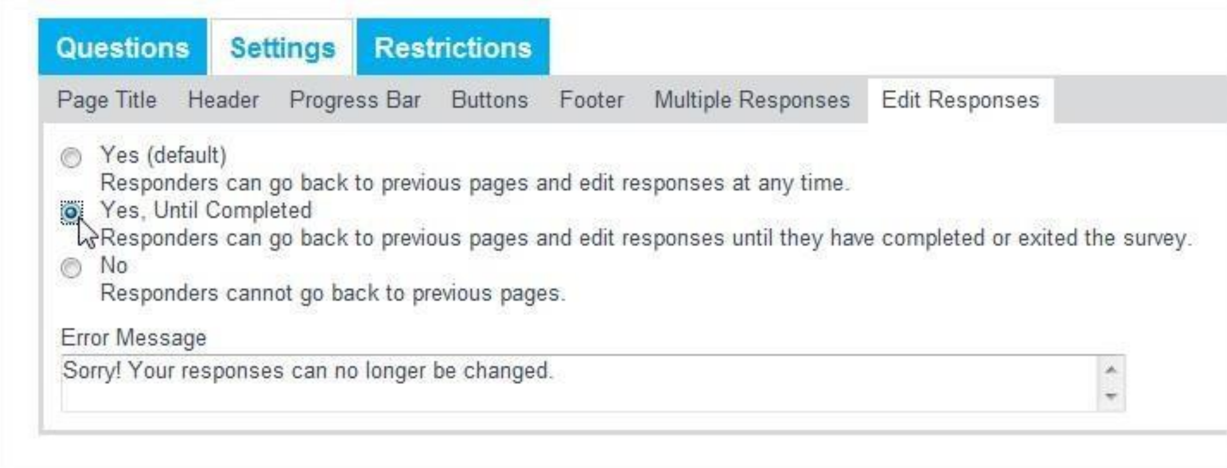
You can also determine the text used to move respondents through the survey via the Buttons option. The default text of the platform is “Next” and Previous” but by clicking into the Buttons section, you can change this text to Register or Submit. You can also determine I you would like each page to have different text within the button by ticking the box in the lower left corner of the interface.



The Multiple Responses option lets event organisers determine if one person can register several people for the same event. This option comes in handy if a secretary is asked to register an entire practice group or the limitation works if you are collecting post event feedback and only want one response per attendee.

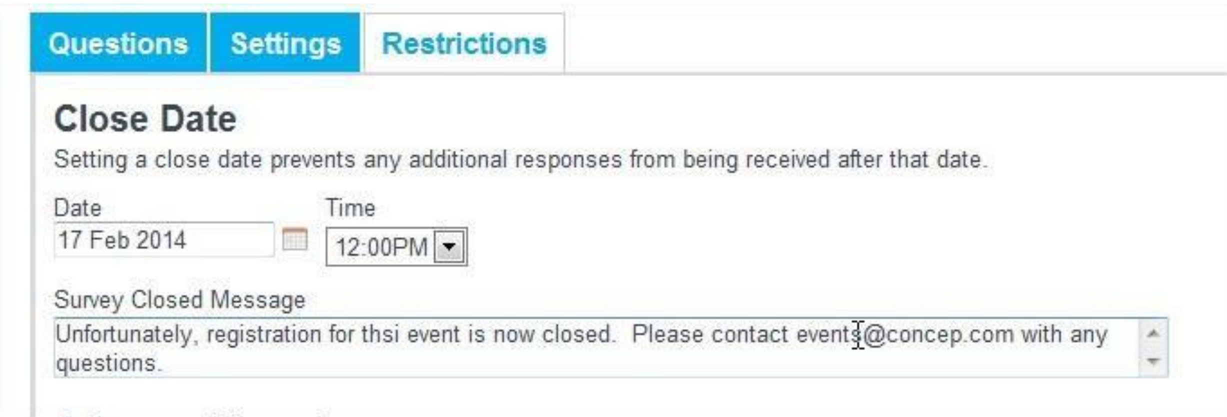


The final option under Settings is to determine whether or not respondents edit their responses throughout the registration process, not at all, or until complete. Typically, users choose the “until complete” option as this allows people to go back and change answers on multi-page registrations but not once they get to the confirmation page.



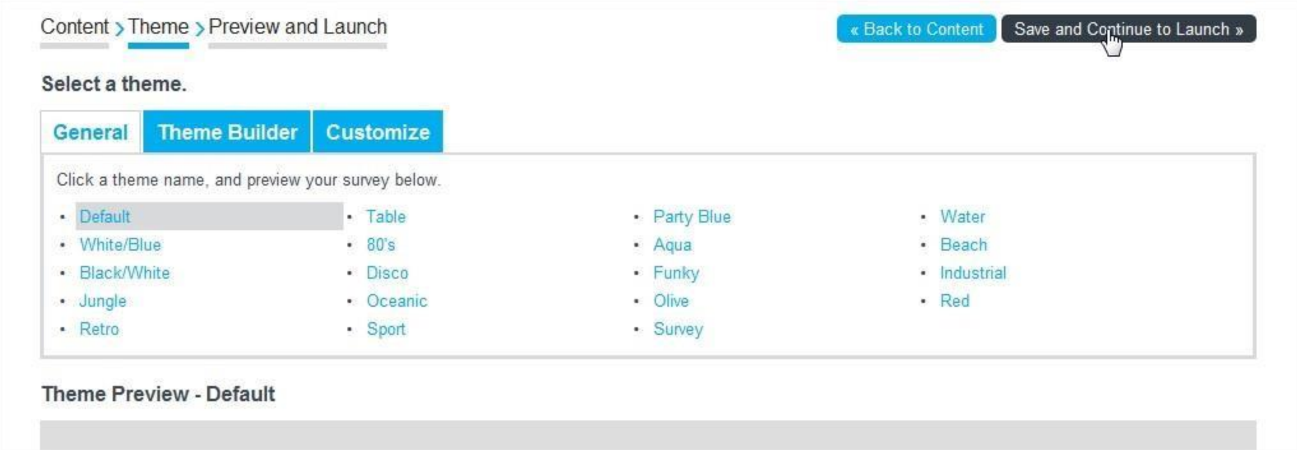
Once you have applied the settings that are relevant to your event, click into the Restrictions tab which is the final step in building the survey itself. The restrictions tab allows event organisers to set a close date for accepting event registrations. The Advanced options will allow organisers to limit responses from specific IP addresses or password-protect the survey's content. If you have questions about the Advanced options, please contact your Account Manager.

Please note that selecting "Yes (default)" means that responders can click back to previous pages. However if they do click back and fill in the form again, it will override their initial response. Therefore we advise you to select either "Yes, Until Completed" or "No".



Once you have finalized the content in your survey, applied the settings and the registration close date, click "Save and Continue to Theme" button in the bottom right corner of the page. This step will allow you to customize how the theme looks when viewed online.

On the Theme page click on the General tab if you wish to select a theme option from this list. The "Default" option from the list provides a clean online interface for most surveys.



However, if you want to change the look and feel of the survey, click into the Theme Builder and you will be given the option to change the size of the survey container, fonts, buttons, and link styles by working through the different steps.

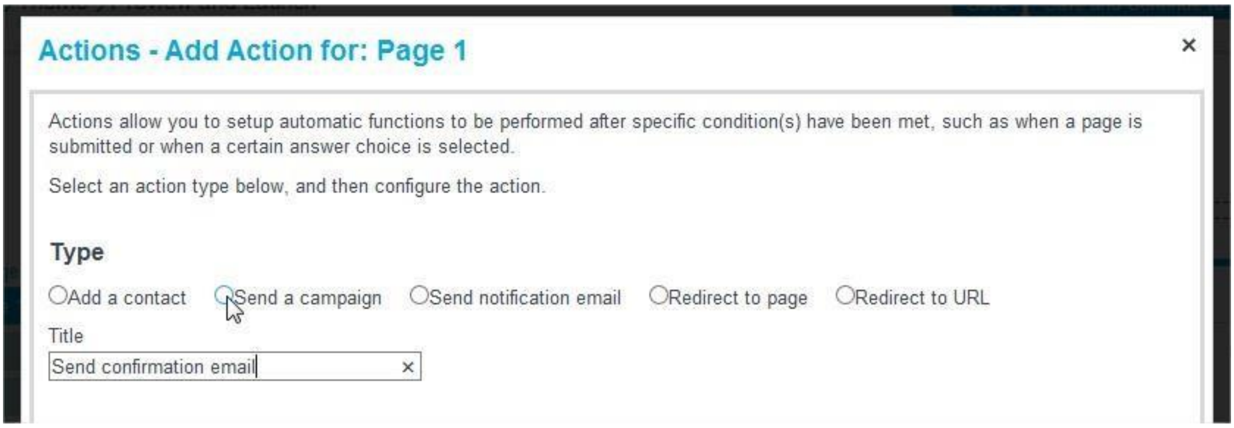
Once you are happy with how the survey looks online, click the “Save and Continue to Deploy” option which is the final step in setting up the registration process. On this page, you can test the registration process as well as ensure you are happy with the look and feel of the survey.

Once you are satisfied that the survey works and looks exactly as you want it to for your event, you are ready for the next step: Adding Actions to your survey.

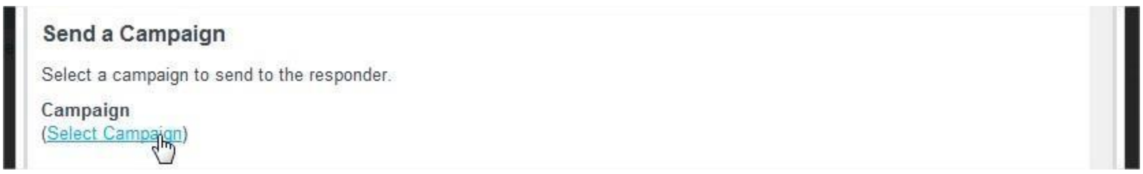
5. ADD ACTIONS

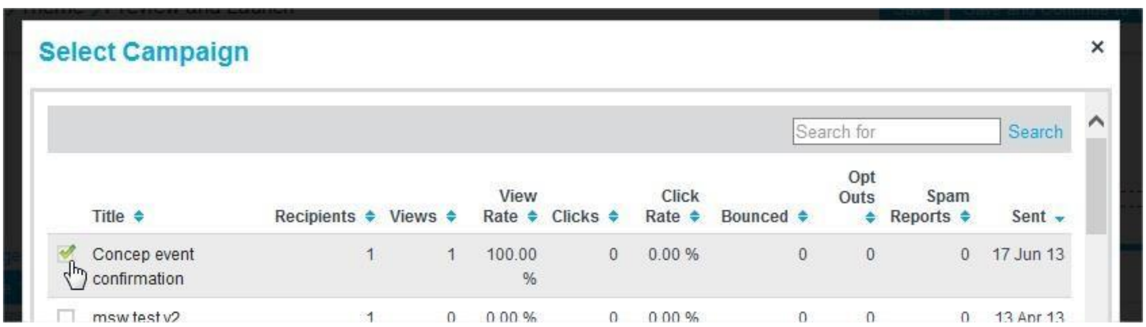
Actions are tools that trigger specific actions, such as send a confirmation email or add a contact to a group, when a responder submits their response. To set up an action you need to click the blue box to the right of Page 1 on your survey and select the “Actions” option.

When the Actions interface appears, click the “Add Action” button in the bottom right corner to bring up the available action options. To send a confirmation email - you will need to select the “send a campaign” option from the ones provided which will bring up the information you need to complete and name the action accordingly.

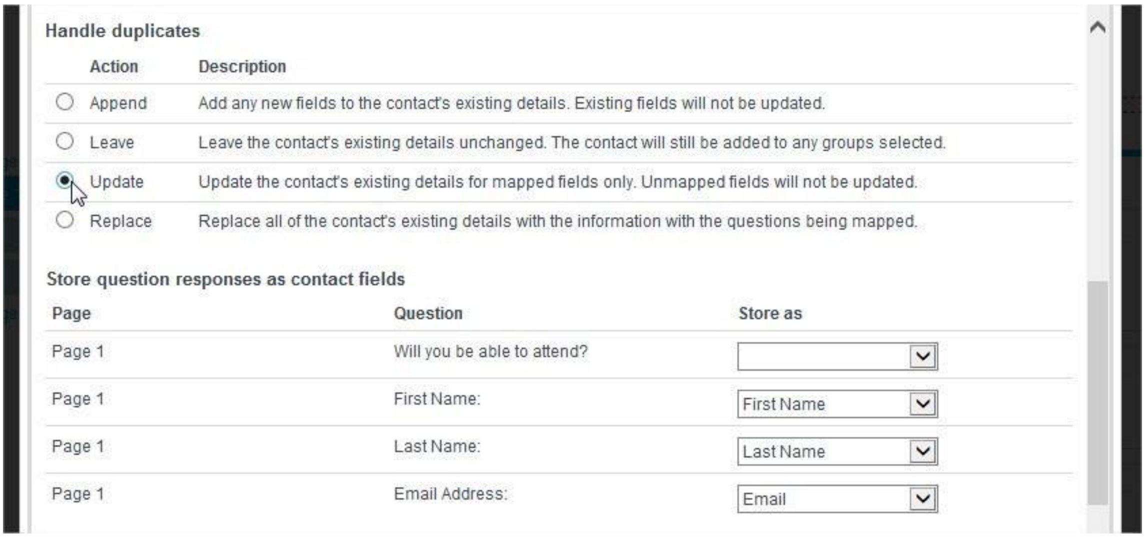


You will then need to select both the campaign you want to send to responders as well as the group you want them to be added to by clicking the “Select Campaign” (which brings up your list of sent campaigns) and “Select Group” links on the page.

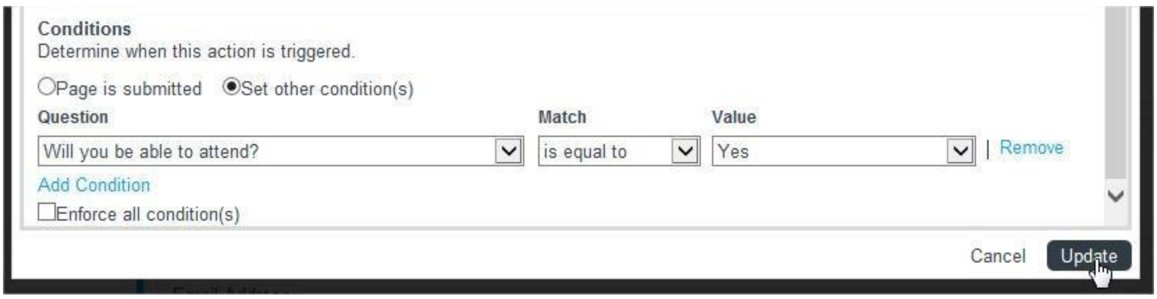




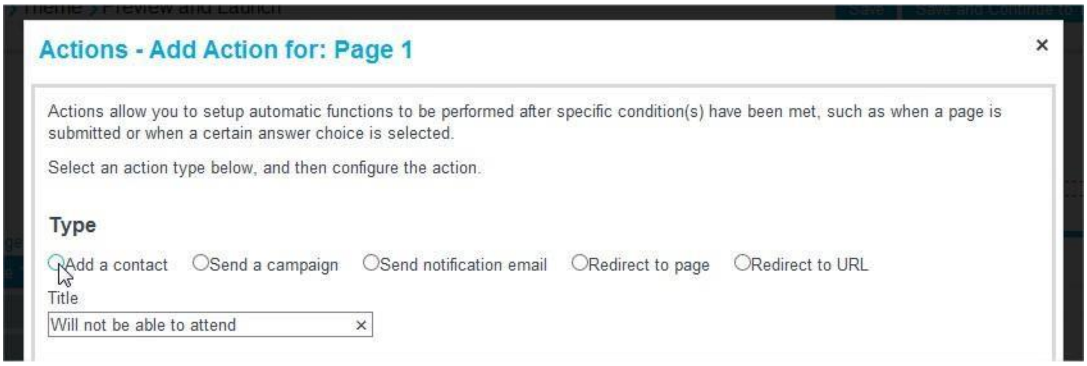
Once you have set up the campaign and group information, you will need to map the information you are collecting from your contacts back into the address book using the drop down fields provided. If you do not want to save information for a particular question, such as dietary requirements, simply choose the “Do Not Store” option from the drop down.



Finally, once all of the fields are mapped, you will need to set the conditions under which this action is to occur. In this instance, you will want to select the conditions that match the attendee saying they will attend your event.



In order to create a list of contacts who will not attend the specific event, you will need to select the “add a contact” option rather than the “send a campaign option” from the Actions interface.



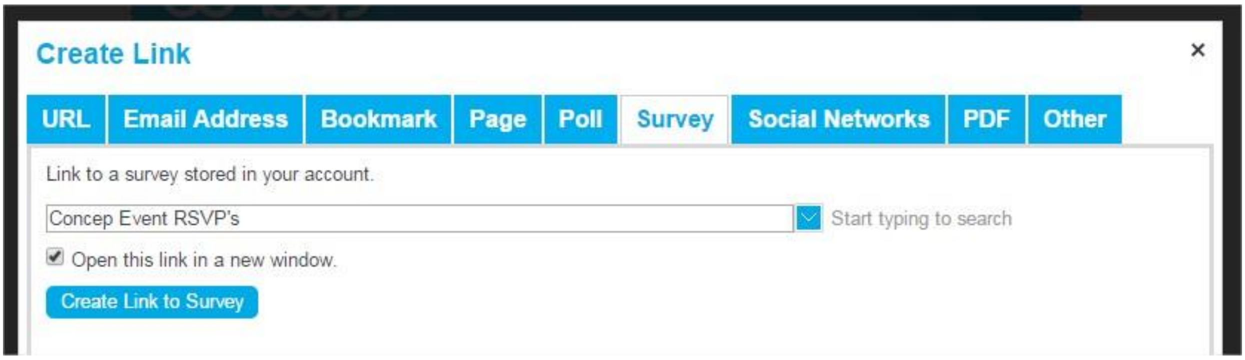
You will then need to select which group you want contacts to be put into, manage duplicate contacts and map the submitted contact information back into the contact’s record as you did in the “Send a campaign” action.

Once you click to add the action, you will want to click to save all changes you have applied to the survey. Then click to view the survey and test that the actions are triggering correctly by answering both the “yes” and “no” questions then checking to ensure you were added to the correct address book group and that you receive your confirmation email.

6. SENDING YOUR INVITATION CAMPAIGN

Once you have finalised your survey, the final step will be to create and send out your invitation campaign. You create your campaign in the way you would any other, making sure to include all relevant details such as date, times, location, speaker details, and agendas. You will then need to link your invitation campaign to the RSVP survey.

To do this, highlight your RSVP text or imagery and click the “create link” icon. Choose the “Surveys” tab from the provided link options and then select the name of your event’s survey from the drop down menu. Once you have selected your survey click the “Create link to survey” button and make sure to save your content.



Once you have linked your survey to the invitation, make sure to run several internal tests to ensure that each aspect of the process is working as expected. When you are confident that the process is correct, add your master invitation list and send out the campaign.

7. REMINDER TO REGISTER

Unless your event has reached capacity a couple of weeks after the invitation was sent, you may decide to send a Reminder to Register campaign.

The Reminder to Register campaign should be sent to two types of invitees which you may or may not decide to treat differently:

1) Those who viewed the original invitation campaign but **did not respond**.
2) Those who **did not view** the original invitation campaign.

Resist temptation to simply resend the invitation. There was a reason why the recipients didn't view/respond to the original campaign! Perhaps make the subject line a bit more compelling or create some urgency around registering (e.g. '*Last chance to register…*or '*Don't forget to register…*),

It is also a good idea to set the second type of invitees to receive the Reminder to Register as *plain text*, in case it was there was a delivery issue preventing recipients from responding to the original invitation campaign.

As a rule of thumb, only send one Reminder to Register. If your registration numbers are far below the expected attendance it may even be advisable to ask the relationship manager to follow up with non-respondents manually, i.e. by phone or personal email.

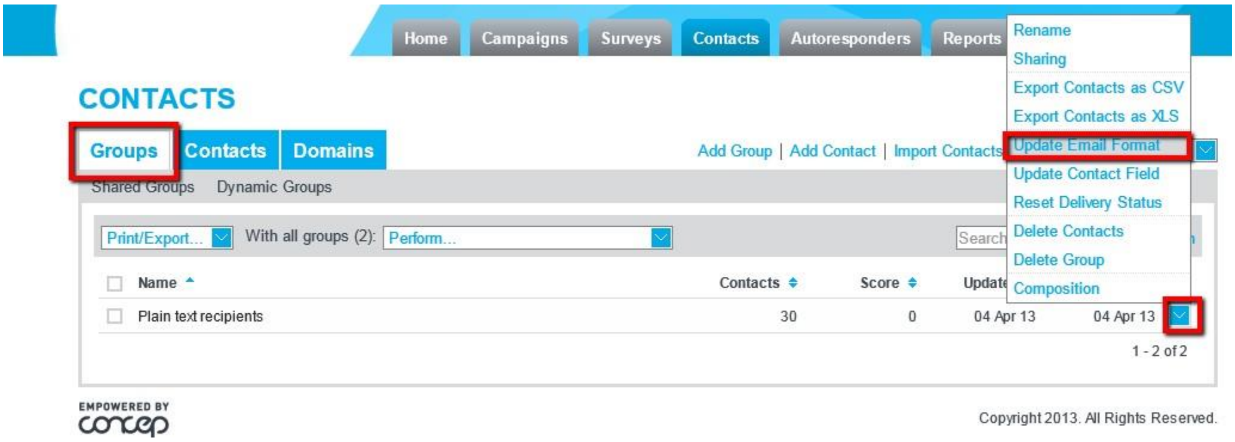
7.1 Preparing recipient lists for Reminder to Register campaign

Step 1: Setting non-views to receive plain text format (if required)
In the reporting for your invitation campaign, click on the 'Recipients' tab and then the 'Not viewed' sub tab. Once you see the list of all contacts who did not view the campaign, add them to a new address book group by clicking on 'Add to Group' in the 'Perform' drop down menu.

You will want to create a new group specifically for this list of contacts to make sure it is clear in your address book whom they are.

Once you have created the new group, leave the campaign reporting page and go to your address book, by clicking on the top grey ‘Contacts’ tab. Locate your group, and select ‘Update Email Format’ in the drop down menu by clicking on the blue arrow icon in the far left column. Change format to ‘Plain Text’.

Once you have created the new group, leave the campaign reporting page and go to your address book, by clicking on the top grey ‘Contacts’ tab. Locate your group, and select ‘Update Email Format’ in the drop down menu by clicking on the blue arrow icon in the far left column. Change format to ‘Plain Text’.



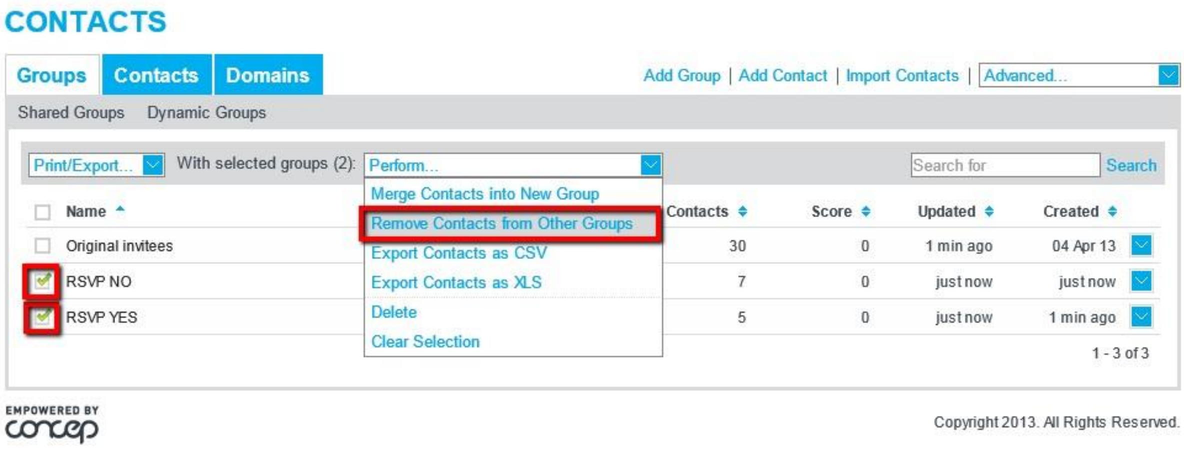
Be aware that these recipients will continue to receive email campaigns in Plain Text format until you change them back to HTML.

Step 2: Extract non-respondents from the original invitee list
What you need to do now is to remove from your recipient list all those people who have responded – whether they accepted or declined (or cancelled, if relevant).

If you set up a ‘form action’ (see section 5) to add recipients to specified address book groups (see section 3) when they RSVP, the easiest way of doing this is to use Send’s ‘de-dupe’ feature. If you did not set up a form action you will need to upload your lists of accepted and declined respondents manually.

Click on the ‘Groups’ tab in your address book. Select your two RSVP groups and click on the ‘Remove Contacts from Other Groups’ in the Perform drop down menu.

This will bring up a list of all your groups, and you should select the list with your original invitees. The recipients you are left with are those who should receive the reminder.



8. REMINDER TO ATTEND

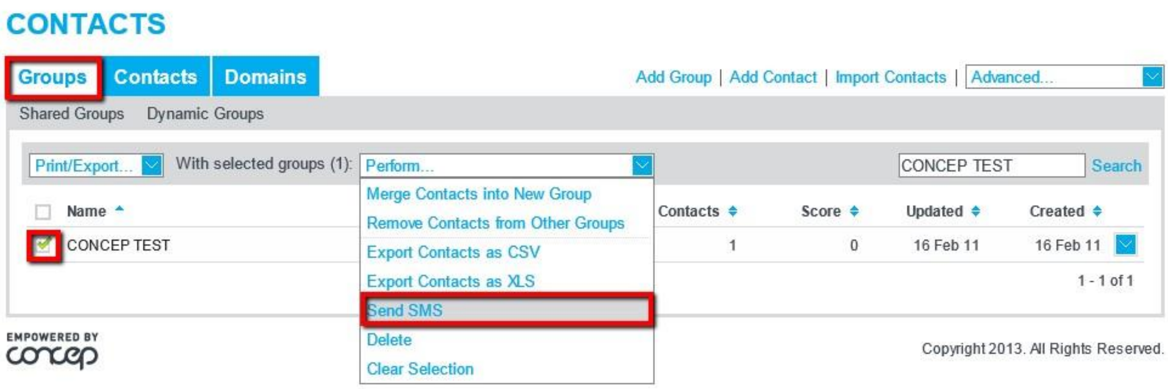
A Reminder to Attend campaign to registered attendees can be a good way of reducing the number of no-shows on the day of your event. You can choose to distribute this as either an email campaign or an SMS. Which one you choose depends on your event and your recipient group. A Reminder to Attend email campaign is generally sent the day prior to the event while you may choose to send an SMS reminder for a lunch time briefing in the morning of the event. Even though you may make use of both for a particular event, as a rule of thumb each recipient should only receive one of the two.

In some circumstances, for example if registrations were collected several weeks prior to the event or if attendees are likely to have to make special travel arrangements, you may decide to send the reminder a few days before the event.

Depending on your event, it may also be appropriate to give registrants an opportunity to cancel their attendance – whether via an email link to the event organiser or a purpose-built cancellation form.

Make sure you include all the relevant event details in the reminder, such as time, date, directions, dress code, etc. so that attendees will not have to search for the original invitation or registration confirmation in their inbox.

The SMS send feature is accessed under the ‘Perform’ menu in the address book. The feature needs to be activated by Concep, so if is not visible in your account contact your Account Manager.



9. POST EVENT COMMUNICATION

Regardless of how small your event is, it is always a good idea to send a post event campaign thanking attendees for their time. The content of this will differ depending on your event. You may include presentation slides, photos, or videos from the event. The post-event campaign is also an excellent channel for distributing feedback surveys and inviting attendees to submit their comments.

If you need to provide attendees with participation certificates or continual professional development points, you could consider triggering this automatically when a feedback survey is completed. This will increase your response rates to the survey. You would use the form action ‘Send Campaign’ in the same way that you triggered the registration confirmation email. You can personalise the certificate by mail merging in attendee details such as name, venue, date, session attended, etc. You may also want to set up a print friendly version for attendees to keep on file.

Two groups often neglected when it comes to post event communications are no-shows and declines. Why not sending them a note saying it was a shame they missed the event, and perhaps include any presentation notes, slides or video?

10. THE EVENT COMMUNICATION SCHEDULE

The event communication schedule will vary depending on your event and whether you will need to outsource any of the steps to Concep or one of your internal teams, but the below provides a good starting point.

TIME	TASK
- 9 weeks	▪ If you are outsourcing any of the tasks to Concep now is when we will need to receive a brief to provide you with a quote and delivery schedule
- 8 weeks	▪ Brief Concep on new template design and other creative requirements for the event
- 5-6 weeks	▪ Send invitation / Registration form live
- 3 weeks	▪ Finalise content for reminders, post event campaign, feedback surveys and attendance certificates. ▪ If you are outsourcing any of these parts to Concep, now is when we would need to receive signed-off content.
- 2-3 weeks	▪ Send Reminder to Register email
- 1 Day	▪ Send Reminder to attend email or SMS
0	**EVENT**
+ 1 Day	▪ Send post event campaign / feedback survey

11. CONTACT

If you would like to discuss the process laid out in this document please contact us with the below details.

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