Ongoing Customer Surveying

Evergage automatically captures real-time interaction data from your customers and prospects and makes that data available for reporting (in segments) and messaging. In addition to implicit data captured from the site, Evergage can also be used to gather explicit data through survey questions. In turn, the answers received can be used to identify upsell opportunities, present relevant content or collect product improvement suggestions. And by responding with rich content, you encourage visitors to reveal more insights.

| Category	Demand Generation	Vertical	Technology, SaaS
Topic	Add survey elements to a message to gather customer feedback	ID #	104

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Example

A customer logs into your product and in the right rail of your site, she sees an inline message asking her to identify the primary reason for using your application. Of the four options, she chooses the second 'reduce client churn' and selects the submit button.
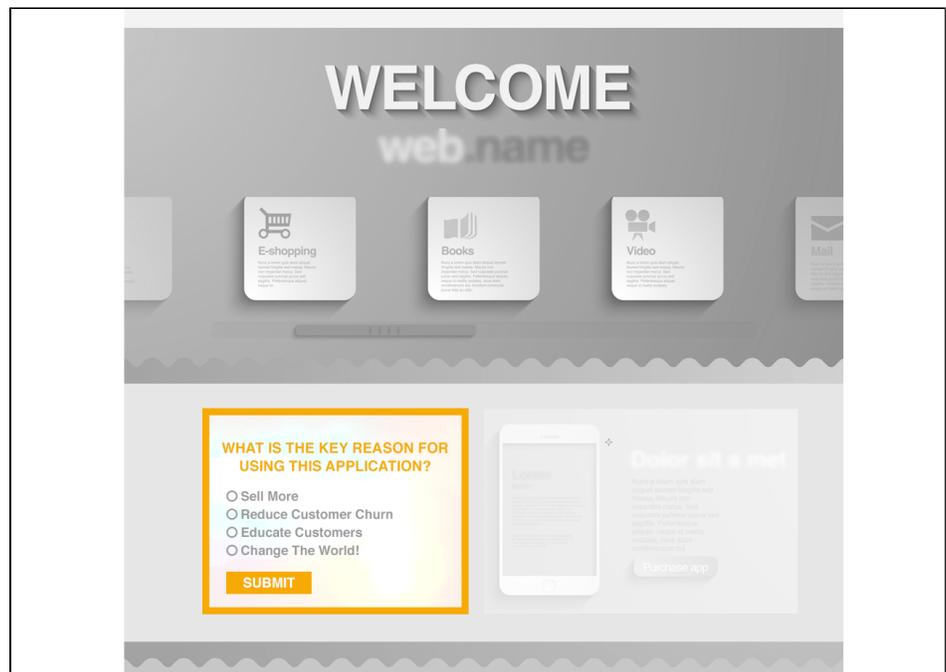
She then sees another message in place of the survey. This time it contains a link to an article called 'Top 10 Tips for Making and Keeping Happy Customers.' Using Evergage, you can track whether she clicks and views the article.
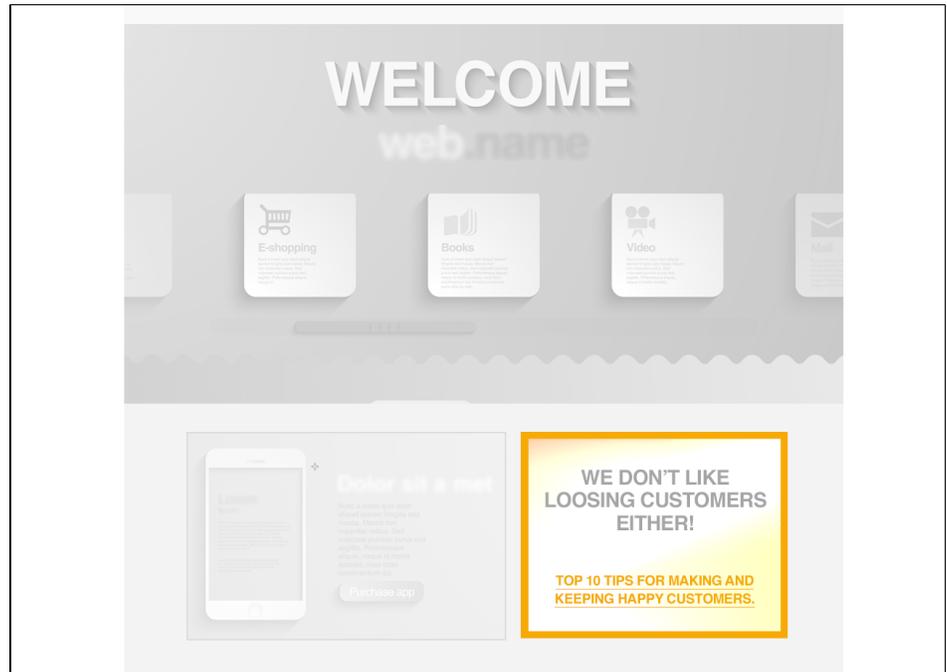
Segment

You will need to create a segment for each answer to the survey question. For example, create a segment with the text attribute key reason equal to "reduce customer churn." When the visitor answers the survey question, he will be placed in the segment and will see the message that replaces the survey.

Measure

The measure of success here is based on having richer explicit data on your customers that can be used to build deeper segments over time and offer more personalized recommendations.

Setup

Process

Here is a checklist of what you need to do in Evergage to create this play on your own site:

1. Creating a simple survey on your site. Use the 'Insert Element' > 'Form Elements' to add radio

Reference Materials

The following articles from the *Evergage Knowledge Base* will provide process steps to help you execute this play:

- Create or Edit a Web Campaign
- Style Evergage Messages

buttons, text fields, checkboxes, and a submit button. For example, if your question is 'What is the key reason for using this application' create a radio button survey with the 'Evergage User Field' set as 'Key Reason.' Your 'OptionValues' would be 'sell more,' 'reduce customer churn,' 'educate customers,' and 'change the world.' Preset answer options are recommended for segment qualification rules

2. Every time someone chooses an answer and selects submit, Evergage captures the value in the user attribute field 'Key Reason' and the visitor is added to the segment you created for that answer.
3. Add "Answered Reduce Customer Churn" segment to the campaign SETUP > Campaign Settings > Campaign Wide Rules
4. If desired, create a follow-up message for visitors who qualify for a certain segment:
    1. **Branching Survey**: create another survey question and limit the segment to those who answered the original question in a particular way. For instance, if a survey question asked 'What is the number one reason clients give for leaving?', you could then configure a response message so it's only shown to people who fall into the 'reduce customer churn' segment.
    2. **Article Presentation**: include follow-up information instead of another survey. For example, for someone choosing 'reduce customer churn,' display a message that says 'We don't like losing customers either - check out our 'Top 10 Tips for Making and Keeping Happy Customers.'