

Tutorial: Creating a Customer Satisfaction Survey

The following tutorial will demonstrate how to create a customer satisfaction survey using the AskAnywhere® Editor. The tutorial will cover the following areas:

1. changing background color and inserting graphics
2. creating a title and introduction
3. creating questions and response sets, including an open-ended question and skip/filter instructions
4. inserting a previously created questionnaire into this questionnaire

This tutorial assumes that by now you are comfortable locating and opening the AskAnywhere® Editor program on your computer. However, should you need to review how to access and open the program please return to the [index](#) to see either the QuickStart guide or the “Getting Started Section” of the full manual (both of which are available in either HTML or PDF formats).

Additionally, this tutorial assumes that you are familiar with some of the basic features of the AskAnywhere® Editor, such as saving a questionnaire, that were covered in the first tutorial, “Creating a Basic Demographic Survey.”

For the purposes of this tutorial, we will pretend that you a member of a marketing research that has been hired by Casa Taco Olé, a regional restaurant chain, to design a customer satisfaction survey that can be distributed to their customers.

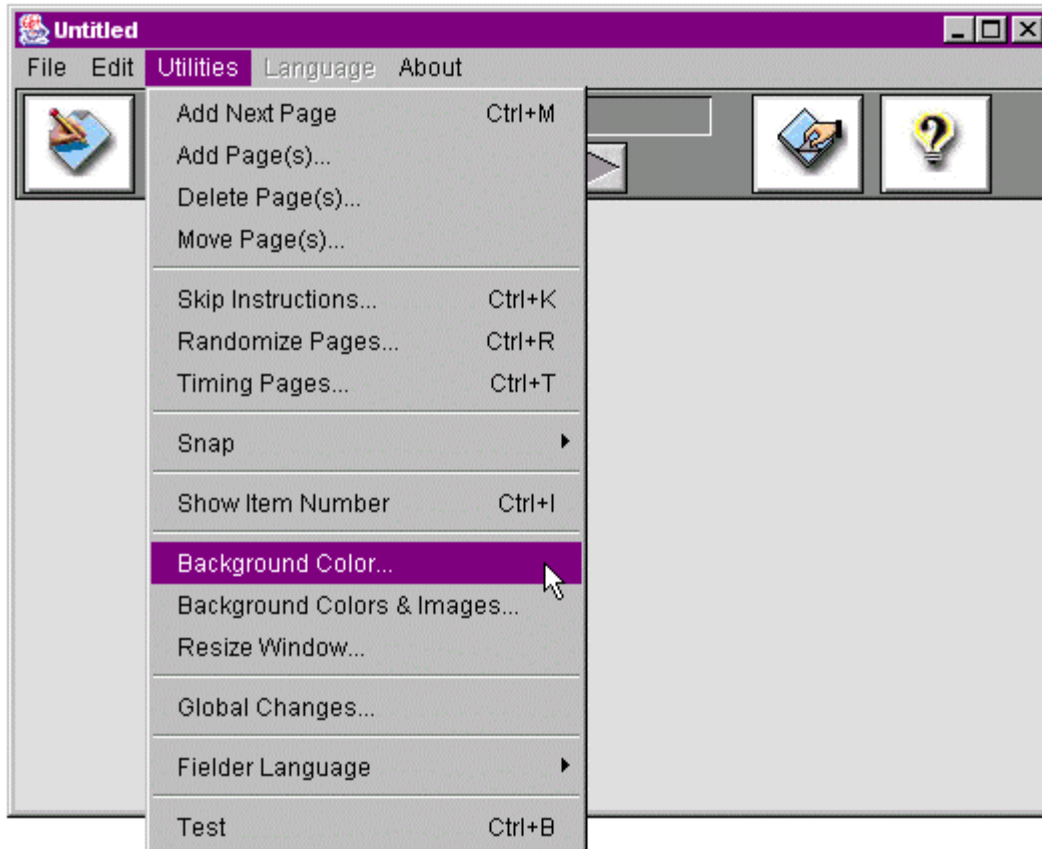
Creating the Questionnaire

To begin creating your customer satisfaction survey, first open the AskAnywhere® Editor program on your computer. Remember, when the program launches, it automatically opens a new, untitled questionnaire page.

Changing Background Color and Inserting Graphics

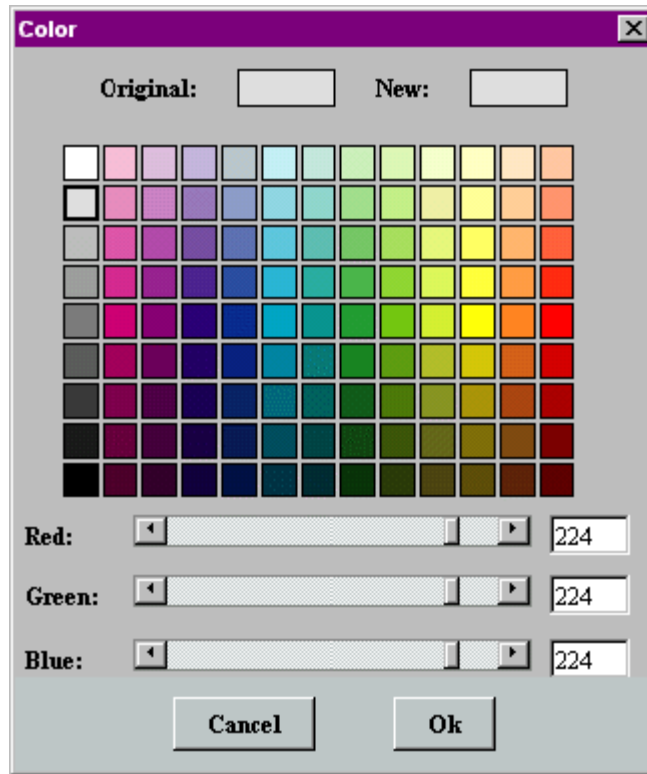
The default background color setting for all surveys is light gray. You want to change the background color of your survey to white. To change the background color, go to the **Utilities** menu and select **Background Color**. (See the figure below.)

Note: To improve readability, the editor window pictured below has been reduced in size; your default window size is larger than that shown in the tutorials.



Selecting Background Color

The following *Color* window, displaying the color palette, will open.



Color Palette Window

Select the color you wish to choose for your background, in this case white, by clicking on that color and click **Ok**.

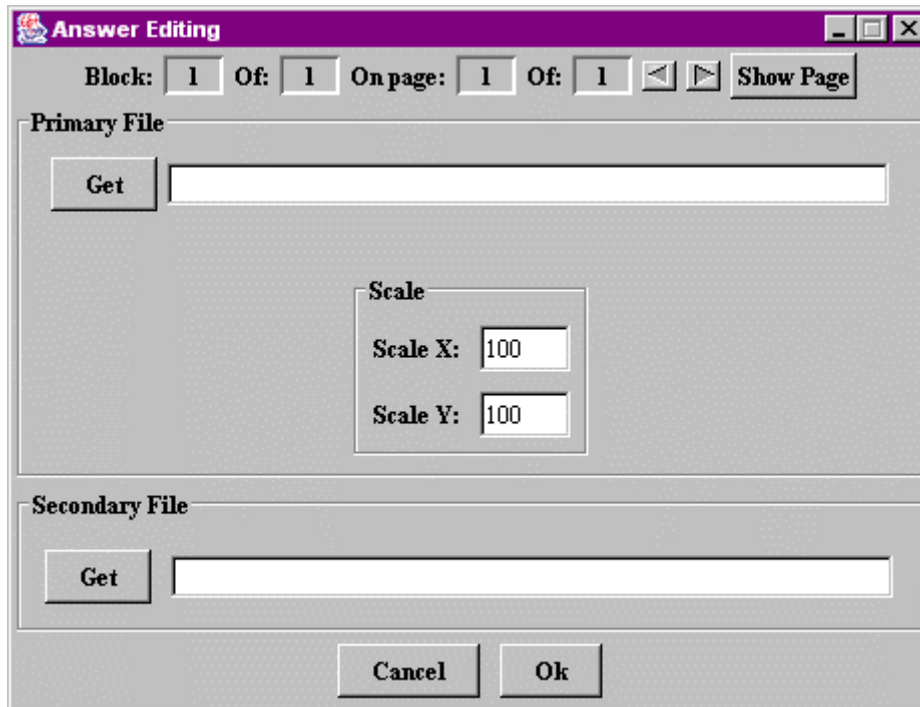
Note: The following step is for demonstration purposes only; you will not actually have a Casa Taco Olé logo saved as a file. You may use any **JPG** or **GIF** file you have saved on your computer to complete the following stage of the tutorial.

On this first page of the survey, you want to include the Casa Taco Olé logo, which your marketing company has been given as an image file and which you have stored on your computer. To add the logo to the survey page, click on the **Add Graphics to Page** button located in the main toolbar. (See the figure below.)



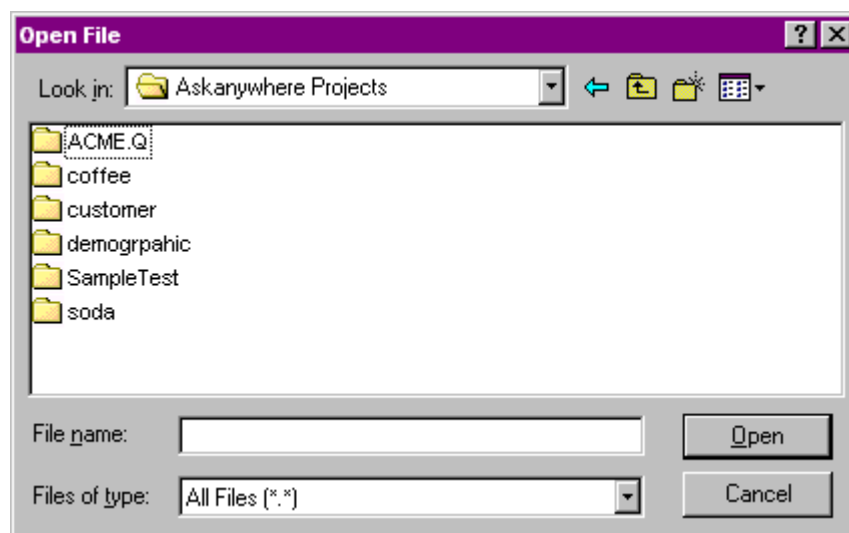
Add Graphics to Page Button

The following new window, which prompts you to get either primary or secondary files will open. (See figure below.)



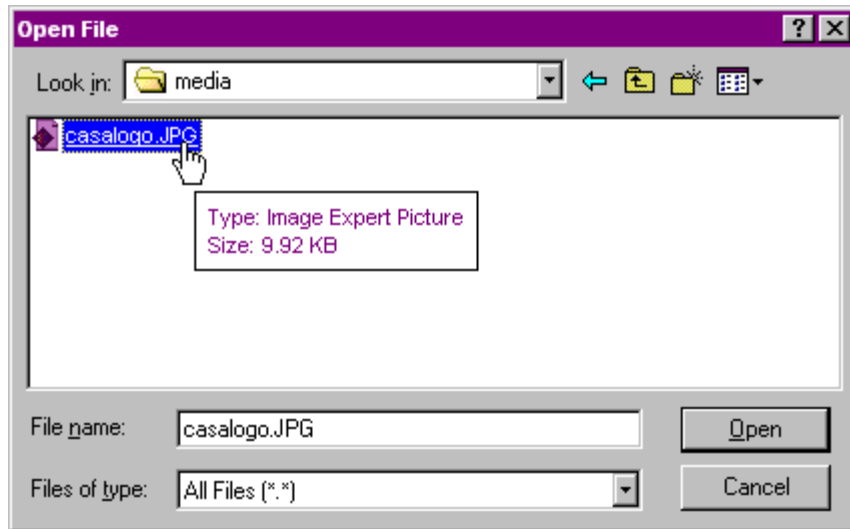
Get File Window

To insert the file containing the Casa Taco Olé logo onto your survey page, click the **Get** button. The *Open File* window, pictured below, will open.



Open File Window

Locate the file you need, select that file and either click **Open** or double click on the file. (See the figure below.)



Selecting a Graphic File

Note: For this particular step in the tutorial, you may select any **JPG** or **GIF** file you have saved on the hard drive of your computer. For demonstration purposes, this tutorial displays a file containing a logo for Casa Taco Olé.

When the **Open File** window closes, click **Ok**. Your survey page should now contain a graphic file. (See the figure below for a sample page containing a graphic.)



Page Containing Sample Graphic

Note: You may need to adjust the size of the graphic frame to fully display the

image you selected. To adjust the size of the graphic frame, click on the frame to highlight it. A small box will appear in the lower right corner of the graphic frame (See the figure above.) Click on that small box, then hold and drag your mouse cursor to adjust the size of the answer frame.

Creating a Survey Title and Introduction

You want to begin by creating a title for your survey and writing a small introduction to your survey. Your introduction should explain the purpose of gathering the information you hope to collect through the survey.

To create the title for the survey, open the **Question Editing** window by clicking on the **Add Question to Page** button and then type the following:

Customer Satisfaction Survey

When you have finished typing the text for the survey title, you may also want to choose the font, size, and color of the text as well as choose the justification for the text.

Note: The default font for questions is Serif, while the default text size is 18 points and the default color is black. The default justification is left.

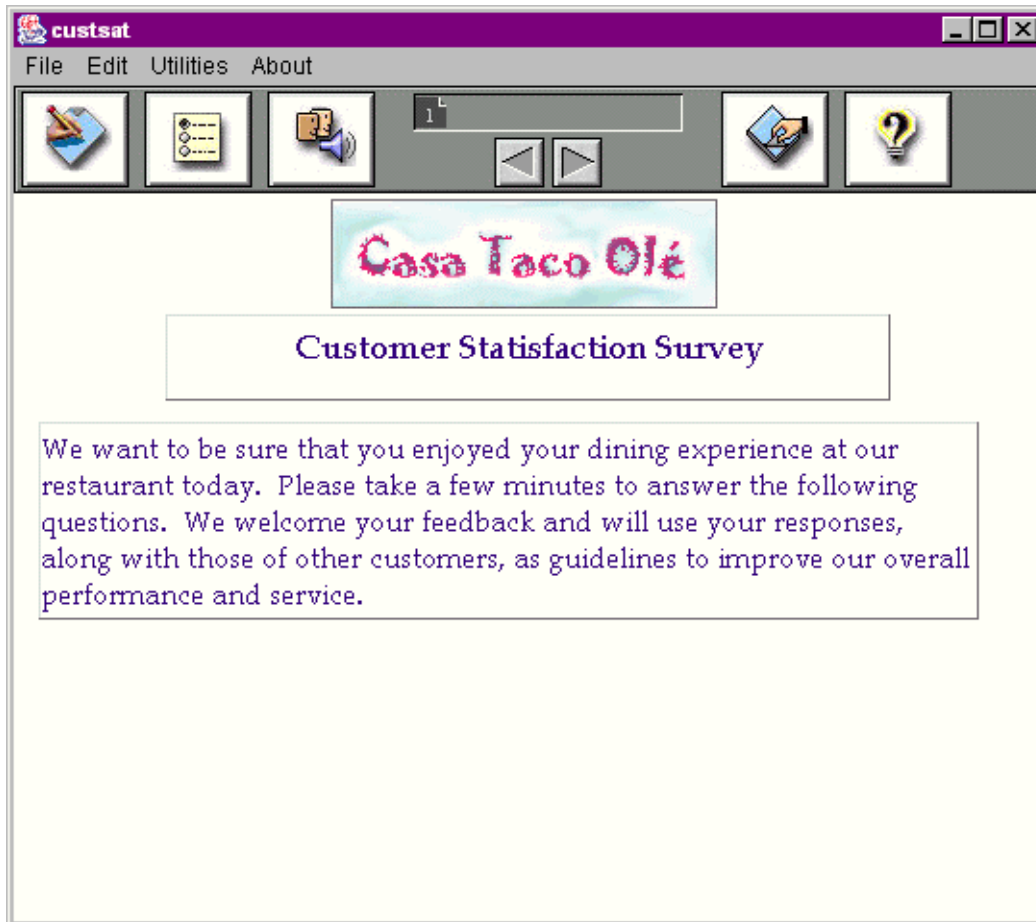
When finished typing and formatting the text of your title, click **Ok**.

To add the introduction to your survey, click once more on the **Add Question to Page** button to open the **Question Editing** window and type the following:

We want to be sure that you enjoyed your dining experience at our restaurant today. Please take a few minutes to answer the following questions. We welcome your feedback and will use your responses along with those of other customers as guidelines to improve our overall performance and service to our customers.

When finished typing the text, you may also want to choose the type style, size, and color of the font for this introduction.

Click **Ok** when finished typing and formatting your text. Your survey page should now contain at three frames—one graphic and two text—and look similar to the page pictured below.



Page with Logo, Title, and Introduction to Survey

Note: If you have not already done so, you may want to save your questionnaire at this point, by going to the **File** menu and clicking on **Save As...** or **Save** and naming the questionnaire file when prompted to do so. Remember to save your work often.

Creating Questions and Response Sets

You are now ready to begin adding questions and response sets to your survey. You will need to begin your questions on a new page. To add another page to this survey, click on the **Append Blank Page** button in the main toolbar of the Editor program window. (See the figure below.)



Append Blank Page Button

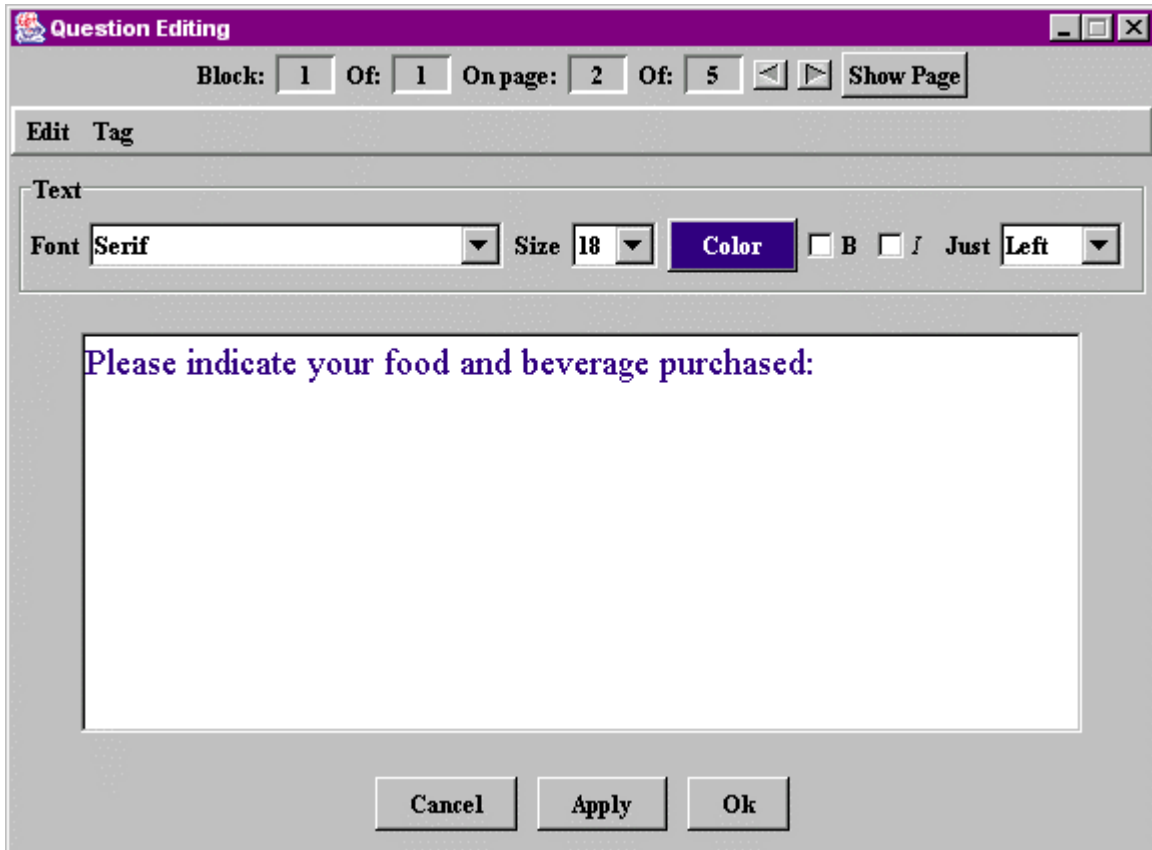
A new page will be added to the survey.

You first want to determine what food and beverage survey respondents. To add your first question, open

the *Question Editing* window by clicking on the **Add Question to Page** button located in the main toolbar. When the *Question Editing* window opens, type the following text:

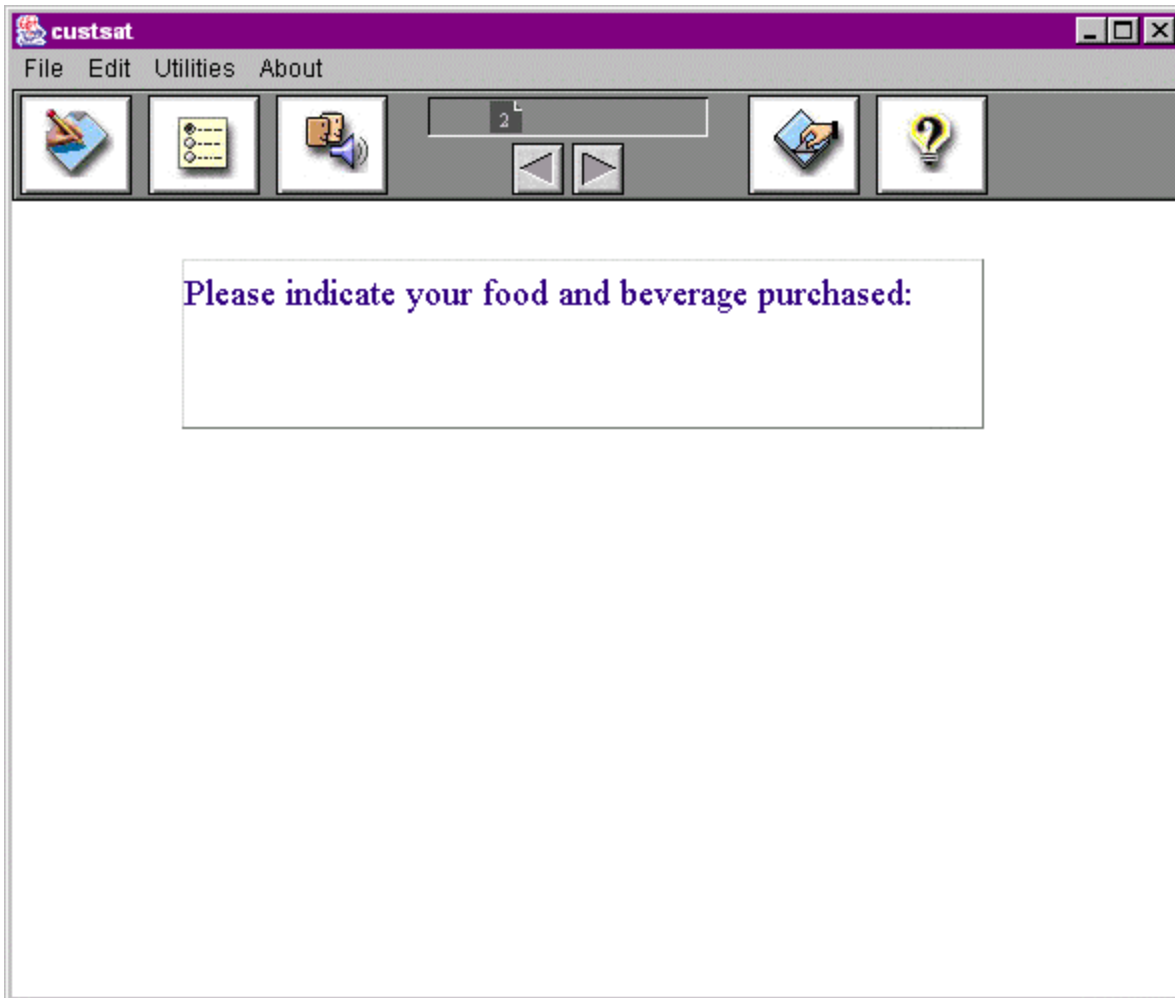
Please indicate your food and beverage purchased:

Refer to the figure below for a view of the text in the *Question Editing* window.



Text Entered in the Question Editing Window

Click **Ok** when finished entering and formatting your text. Your second survey page be similar to the one pictured below:



Sample Page Two with Question Frame

To add your answer set, click on the **Add Answer to Page** button in the main toolbar. Refer to the figure below and enter the displayed text in blank cells under the column heading “Item Text” in the *Answer Editing* window.

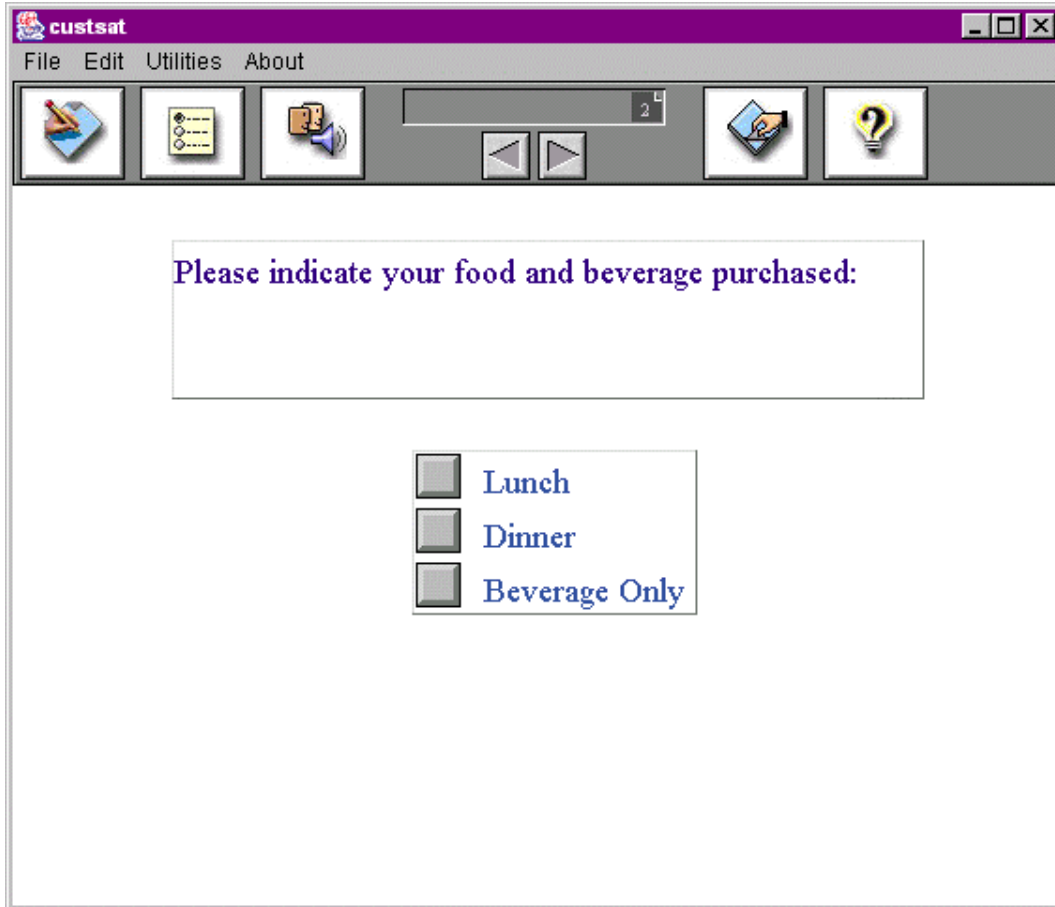
Item Text	Value
Lunch	1
Dinner	2
Beverage Only	3

Entering Answer Item Text

Note: At this point, you may want to format your answer item text by changing the font style, size, or color. The default text settings for answer items are 18

point, Serif in Black.

Click **Ok** when finished entering and formatting the answer item text. Your page should now look similar to the one displayed below.



Sample Survey Page Two with Question and Response Set

The first four questions of the survey are related to the respondents' experience with the Casa Taco Olé staff and the service; therefore, you are going to put them on the same survey page.

Add a new page to the survey by clicking on the **Append Blank Page** button in the main toolbar. After the new page is added, click on the **Add Question to Page** button in the main toolbar to open the **Question Editing** window. When the **Question Editing** window opens, enter the following text:

Please rate your level of satisfaction with the staff and service at this Casa Taco Olé.
Check one answer for each.

When finished typing and formatting your text, click **Ok**.

Click on the **Add Question to Page** button to open the **Question Editing** window once again. Enter the following text.

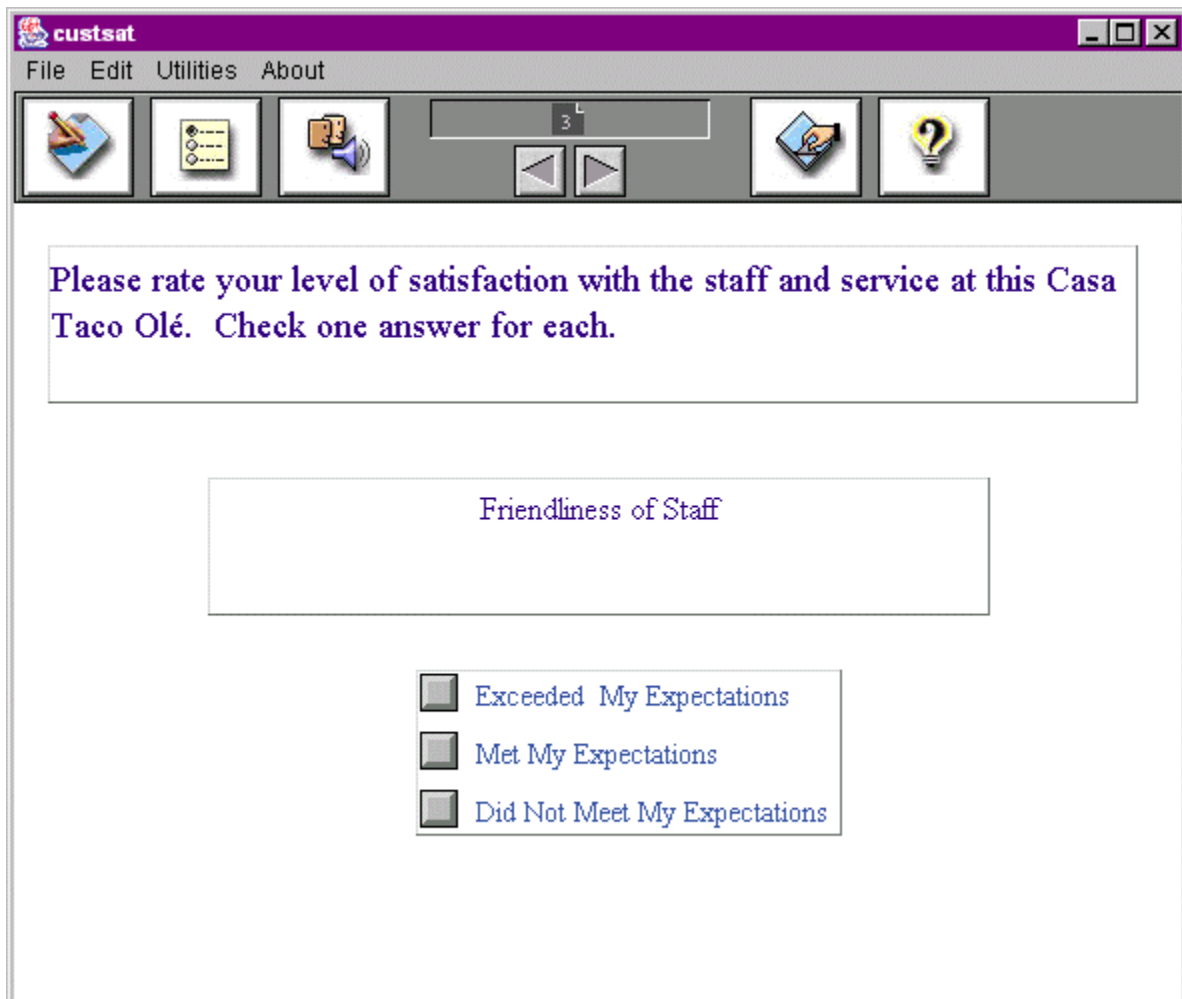
Friendliness of Staff

Click **Ok** when finished entering and formatting your text.

Next, open the *Answer Editing* window by clicking on the **Add Answer to Page** button in the main toolbar. Enter the following text under the “Item Text” heading in the *Answer Editing* window:

Exceeded My Expectations
Met My Expectations
Did Not Meet My Expectations

Click **Ok** when finished entering and formatting text. Your survey page should now look similar to the one pictured below.



Sample Survey Page Three Containing One Complete Question and Answer Set

You will add three more questions and response sets in a similar manner. Refer to the figure below to see the completed page.

Note: After you have added the first answer frame containing the response set, you can simply click on the answer frame to highlight it, go to the **Edit** menu and select **Copy** and then paste the frame on the page three more times instead of opening the *Answer Editing* window and entering the text for the response set three more times.

The screenshot shows a window titled 'custsat' with a menu bar (File, Edit, Utilities, About) and a toolbar. The main content area contains a survey page with the following text and structure:

Please rate your level of satisfaction with the staff and service at this Casa Taco Olé. Check one answer for each.

Friendliness of Staff	Ease of Communicating with Staff
<input type="checkbox"/> Exceeded My Expectations <input type="checkbox"/> Met My Expectations <input type="checkbox"/> Did Not Meet My Expectations	<input type="checkbox"/> Exceeded My Expectations <input type="checkbox"/> Met My Expectations <input type="checkbox"/> Did Not Meet My Expectations
Timeliness of Service	Quality of Service
<input type="checkbox"/> Exceeded My Expectations <input type="checkbox"/> Met My Expectations <input type="checkbox"/> Did Not Meet My Expectations	<input type="checkbox"/> Exceeded My Expectations <input type="checkbox"/> Met My Expectations <input type="checkbox"/> Did Not Meet My Expectations

Completed Page Three of Sample Survey

Note: To fit four questions and response sets on one page, you will need to both reposition and resize each of your question and answer frames.

The next two questions of your survey ask respondents their opinions of the overall menu selection and value of the menu. Since these questions are related, you will put them on one page in the survey.

First, add the next page to your survey by clicking on the **Append Blank Page** button. Then, open the *Question Editing* window by clicking on the **Add Question to Page** button. When the *Question Editing* window opens, type the following as a short introduction to this pair of questions:

Please rate your satisfaction with the both the selection choices and value of the entire Casa Taco Olé menu. Check one answer for each.

Click **Ok** when finished entering and formatting the text.

Click on the **Add Question to Page** button once again and type the following as the text for the first question on this page:

Menu Selection Variety

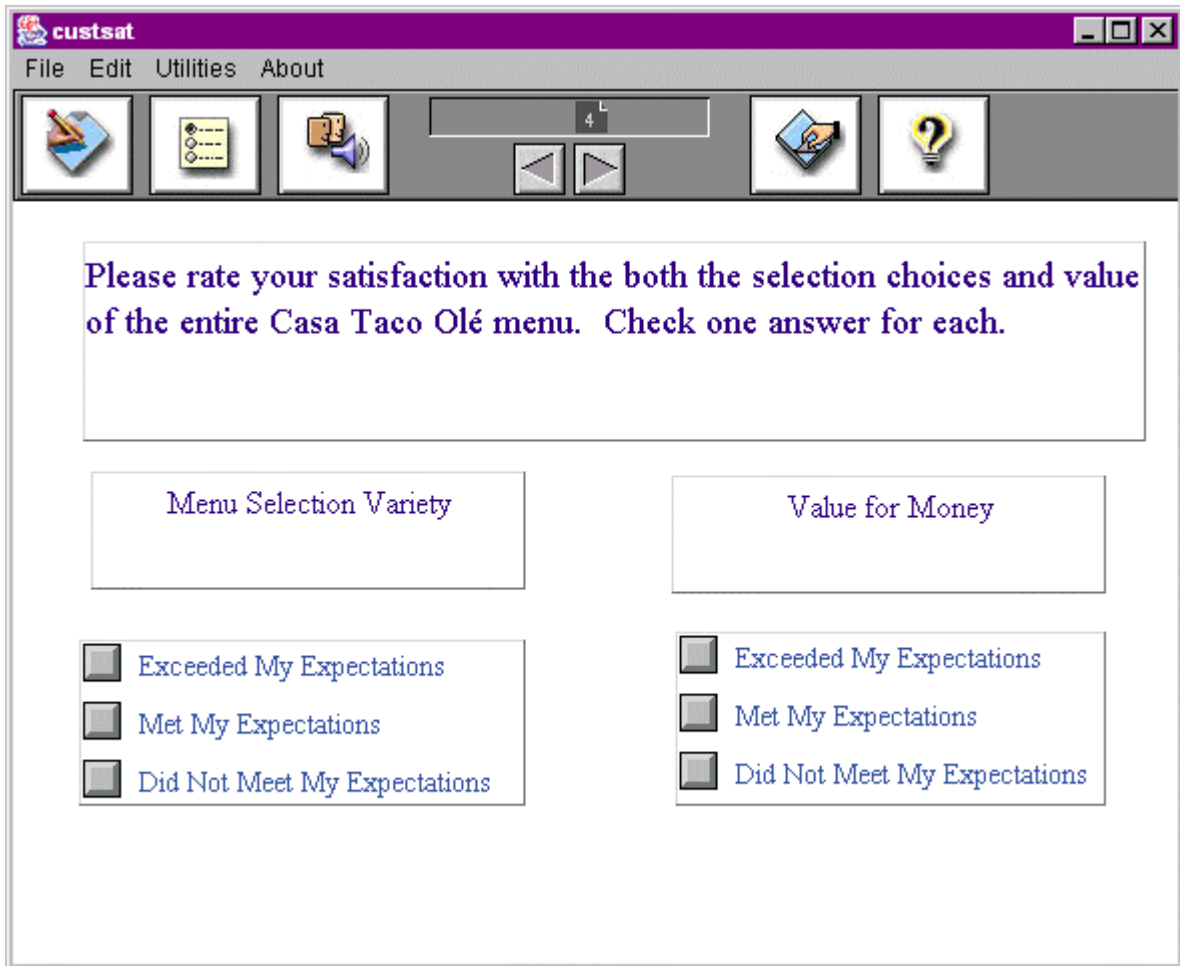
When finished typing and formatting the text, click **Ok**.

Next, click on the **Add Answer to Page** button to open the *Answer Editing* window. Enter the following text under the “Item Text” heading in the *Answer Editing* window:

Exceeded My Expectations
Met My Expectations
Did Not Meet My Expectations

Click **Ok** when finished.

You will add the second question and response set on this page in a similar manner. Refer to the figure below to see the completed page.



Completed Page Four of Sample Survey

The next six questions of the survey ask respondents to consider their specific food order. The first question seeks to find out if customers received the correct order, and a follow-up question for those who did not receive the correct order asks respondents to explain what was wrong with their order. The final four questions of this section ask respondents to rate their level of satisfaction on four aspects of the order they received.

Add the next page to your survey by clicking on the **Append Blank Page** button in the main toolbar. Open the **Question Editing** window by clicking on the **Add Question to Page** button. When the **Question Editing** window opens, type the following text:

Did we fill your order correctly?

Click **Ok** when finished typing and formatting your text.

Next, open the **Answer Editing** window and, referring to the figure below, enter the following text under the heading "Item Text".

Item Text	Value
Yes	1
No	2

Entering Text for Answer Items

When finished typing and formatting the text, click **Ok**. The survey page should now look similar to the one displayed below.

The screenshot shows a window titled 'custsat' with a menu bar (File, Edit, Utilities, About) and a toolbar with icons for editing, a list, a speaker, navigation arrows, a hand, and a question mark. The main area contains a text box with the question 'Did we fill your order correctly?' and two radio button options: 'Yes' and 'No'.

Page Five, Containing One Question and Response Set

If respondents check “NO” for this question, you want to be able to find out what was wrong with the order, so you want to add a second question and response set to gather this information. To add a second

question, click again on the **Add Question to Page** button, which will open the *Question Editing* window. Type the following text:

If no, what was wrong with the order?

Click **Ok** when finished typing and formatting your text.

Next, hold down the **Ctrl** key while clicking on the **Add Answer to Page** button. A modified version of the *Answer Editing* window, pictured below, will open.

Answer: Q8 Block: 3 Of: 3 On page: 4 Of: 5 < > Show Page

Variable

Name [] Label: []

Text

Font **Serif** Size 14 Color B I Entire Set

Items

Use: Rank Temp.Q

< 1 >

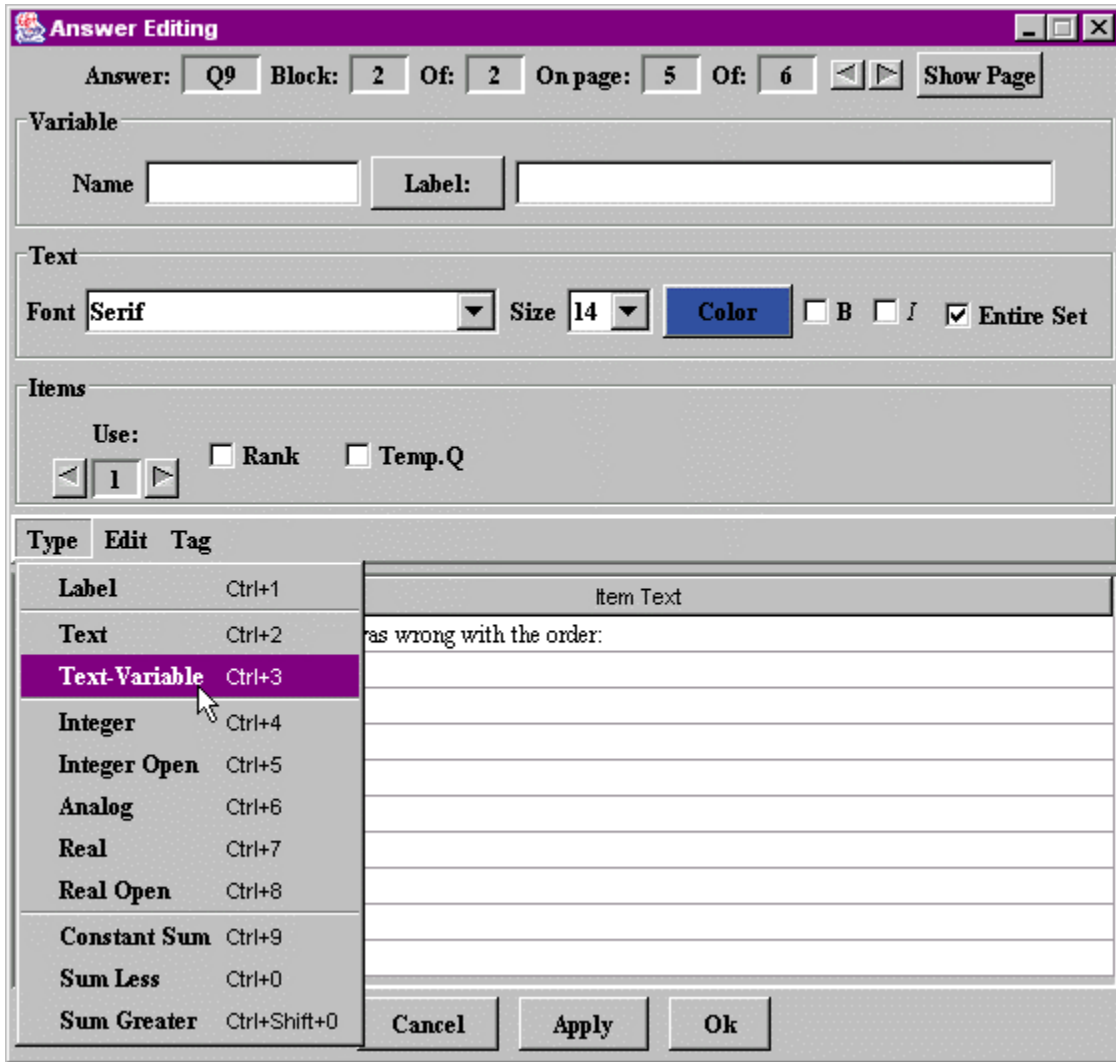
Type Edit Tag

Type	Item Text
Text	

Cancel Apply Ok

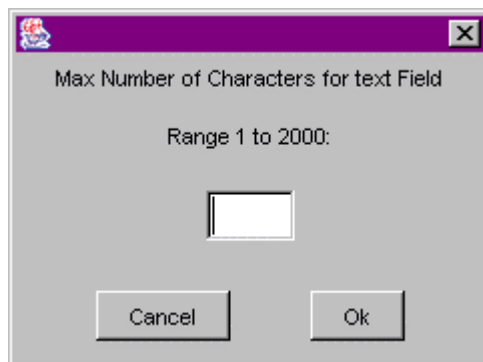
Modified Answer Editing Window

Click on the first cell under the heading “Type”. This cell currently (See the figure above.) reads “Text”. Then, go to the **Type** pull-down menu and select **Label**. (See the figure below.)



Selecting Text-Variable

The following window, prompting you to enter the maximum number of characters you want respondents to be able to enter in the text field, will open:



Text Limit Window

Enter the number you wish to set as the maximum limit, and then click **Ok**.

Note: For this particular answer, the maximum limit of 2000 may be most appropriate. Setting the maximum text limit to 2000 will let respondents respond with answers up to 2000 characters in length.

The limit window will close and return you to the *Answer Editing* window. Click **Ok**. Your survey page should be similar to the one pictured below.

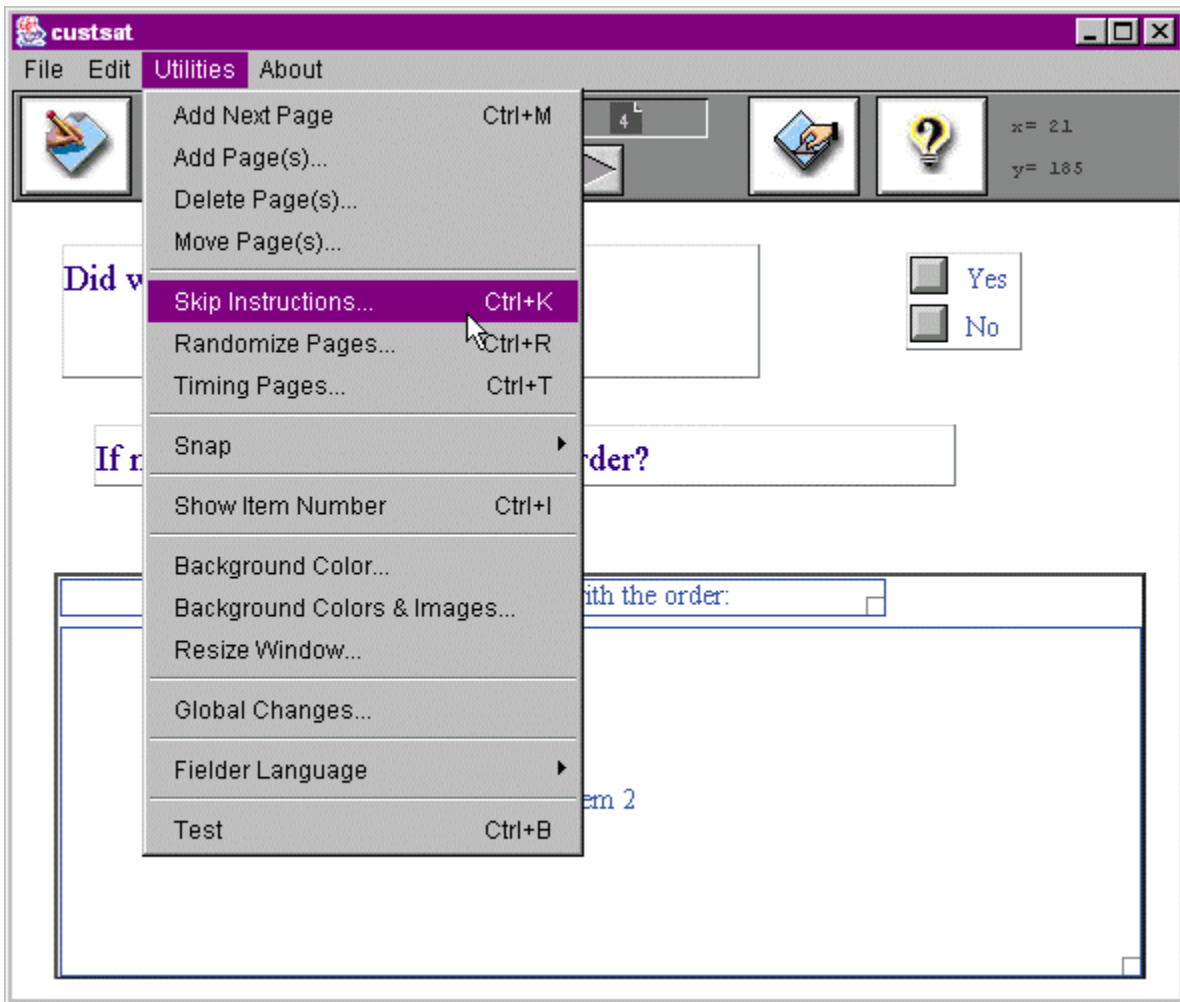
The screenshot shows a software window titled "custsat" with a menu bar (File, Edit, Utilities, About) and a toolbar with various icons. The main area contains a survey question: "Did we fill your order correctly?" with "Yes" and "No" radio buttons. Below this is a text box for "If no, what was wrong with the order?". At the bottom is a larger text box labeled "Item 2" with the prompt "Please tell us what was wrong with the order:". The status bar at the bottom right shows "x= 21" and "y= 185".

Completed Page Five of Sample Survey

Note: In the figure above, "Item 2" represents the text box respondents will be able to enter their responses in when viewing the survey. All the frames on this page have been resized and repositioned in an effort to make the page easier to read. The size of "Item 2" in the Editor window corresponds to the size of the text box respondents will see when taking the survey. To view the size of your text box, you may want to test your survey (Under the **Utilities** menu, select **Test**) and then adjust the size of "Item 2" and, thus, the text box, accordingly.

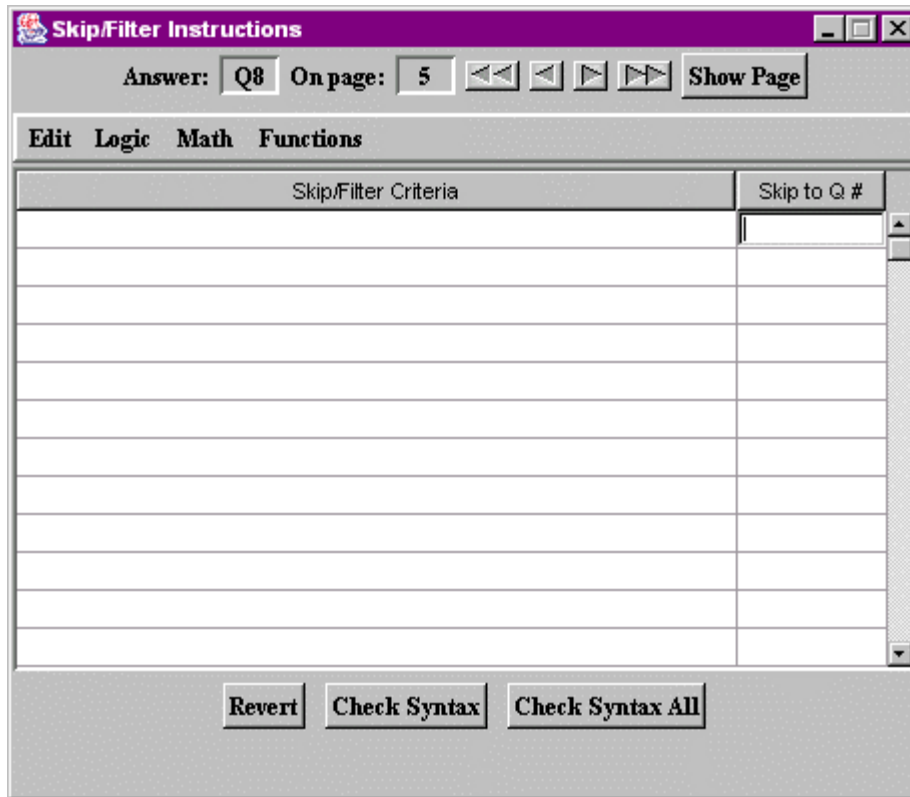
In addition to adding the second question to this page of the survey, you also want to add skip/filter instructions so that the survey will automatically filter off the second question on this page if respondents select “Yes” in response to the first question on this page.

To add your skip instructions, go to the **Utilities** menu and select **Skip Instructions** (or **Ctrl + K** or hold down the **Ctrl** button while clicking on an answer frame). (See the figure below.)



Selecting Skip Instructions from the Utilities Menu

The *Skip/Filter Instructions* window, pictured below, will open.



Skip/Filter Instructions Window

This particular skip will be a basic skip to, the most common type of skip, which will move respondents from one question to another specified question based on their response to a given response set. To create the skip to instructions for this question, you will need two pieces of information: 1) the question/answer number or the variable name for the first question on this page, and 2) the answer value that will cause the skip.

The question/answer set that you want the skip/filter instructions to apply to is Question 8. You can determine the question number by double clicking on the answer frame for the “Yes,” “No” response set and looking at the number next to the heading “Answer:” in the upper left corner of the *Answer Editing* window. Or, if you held down the **Ctrl** key while clicking on the “Yes,” “No” response set answer frame to open the *Skip/Filter Instructions* window, the question number will be displayed in the upper left corner of this window as well. (Refer to the figure above.)

The value for a “Yes” response to Question 8 is “1”, while the value of a “No” response to is “2”. So, if a respondent responds by checking “Yes” or “1”, you want the questionnaire to skip to Question 10. Now that you have both the question number and the response value, you can set the skip/filter instructions.

To set the skip to criteria, type the following in the first blank cell under the heading “Skip/Filter Criteria” in the *Skip/Filter Instructions* window:

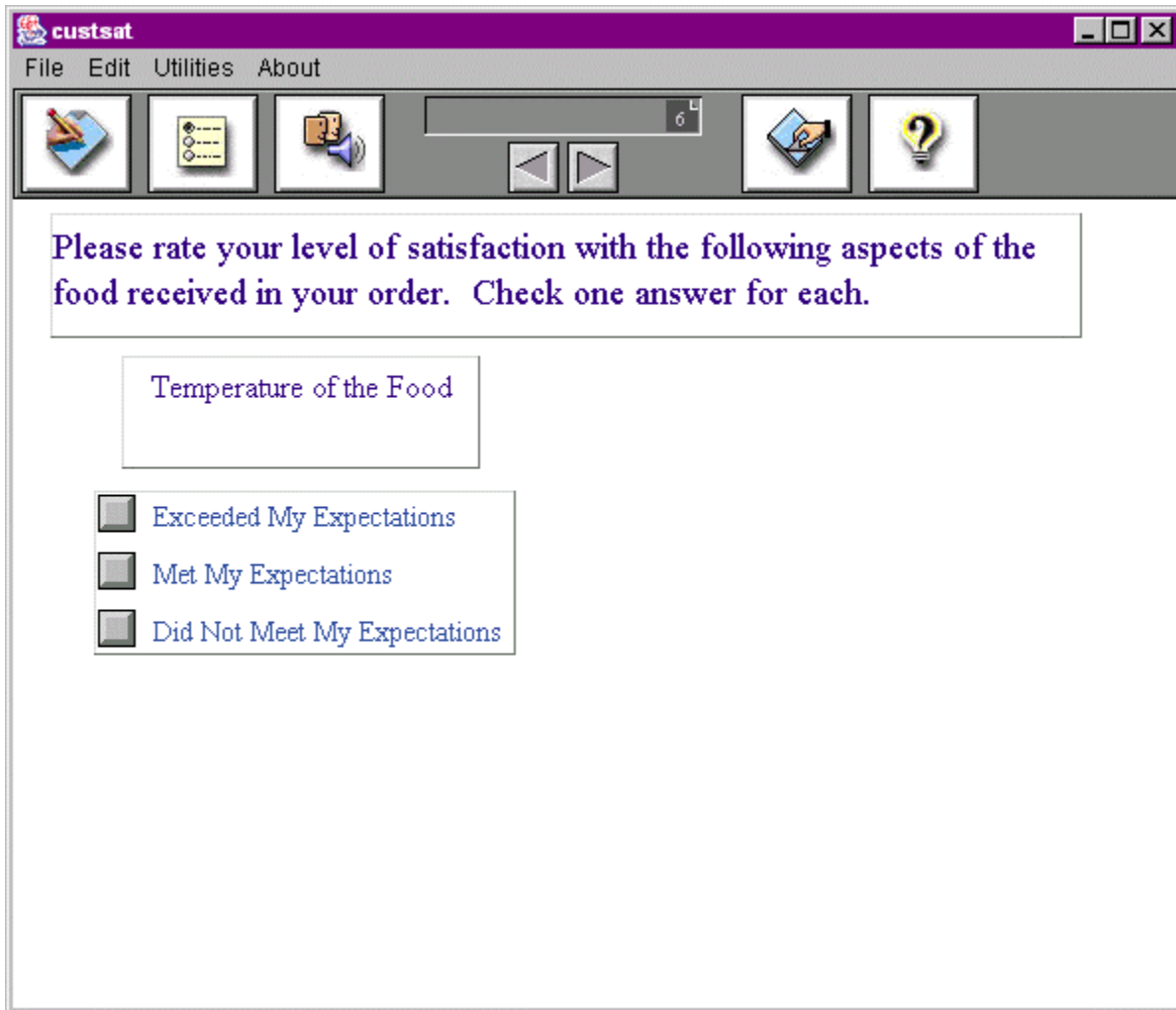
Q8=1

Next, type the number of the question you want the questionnaire to skip to in the first open cell under the heading “Skip to Q#”. In this case, you want the questionnaire to skip Question 9 and go to Question 10,

Open the *Answer Editing* window by clicking on the **Add Answer to Page** button. Under the heading, “Item Text,” type the same three options used for previous answers:

- Exceeded My Expectations
- Met My Expectations
- Did Not Meet My Expectations

Click **Ok** when finished typing and formatting the answer item text. (See the figure below.)



Page Six of Survey with One Question and Response Set

To add the other three questions to this page, follow the same procedure. Refer to the figure below for the text of the next three questions as well as an example of what the sixth page of your survey should be similar to.

Note: To fit four question frames as well as four answer frames on the page, you may need to both resize and reposition each frame.



Completed Page Six of Survey

You are now ready to complete the final two questions of your survey, which will ask respondents to rate their satisfaction with two aspects of the restaurant itself. These questions will be displayed on the same survey page. To add the next page to the survey, click the **Append Blank Page** button in the main toolbar of the Editor.

When the new page opens, click the **Add Question to Page** button to open the *Question Editing* window.

Type the following text as a short preface to these last two questions:

Please rate your level of satisfaction with the following aspects of the Casa Taco Olé you visited today. Check one response for each.

Click **Ok** when finished typing and formatting your text.

Open the *Question Editing* window once again by clicking on the **Add Question to Page** button in the main toolbar of the Editor. Type the following text for the first question on this page:

Cleanliness of the Restaurant

Click **Ok** when finished typing and formatting text.

Open the *Answer Editing* window by clicking on the **Add Answer to Page** button in the main toolbar of the Editor. In the empty cells under the heading, “Item Text,” type the following:

Exceeded My Expectations
Met My Expectations
Did Not Meet My Expectations

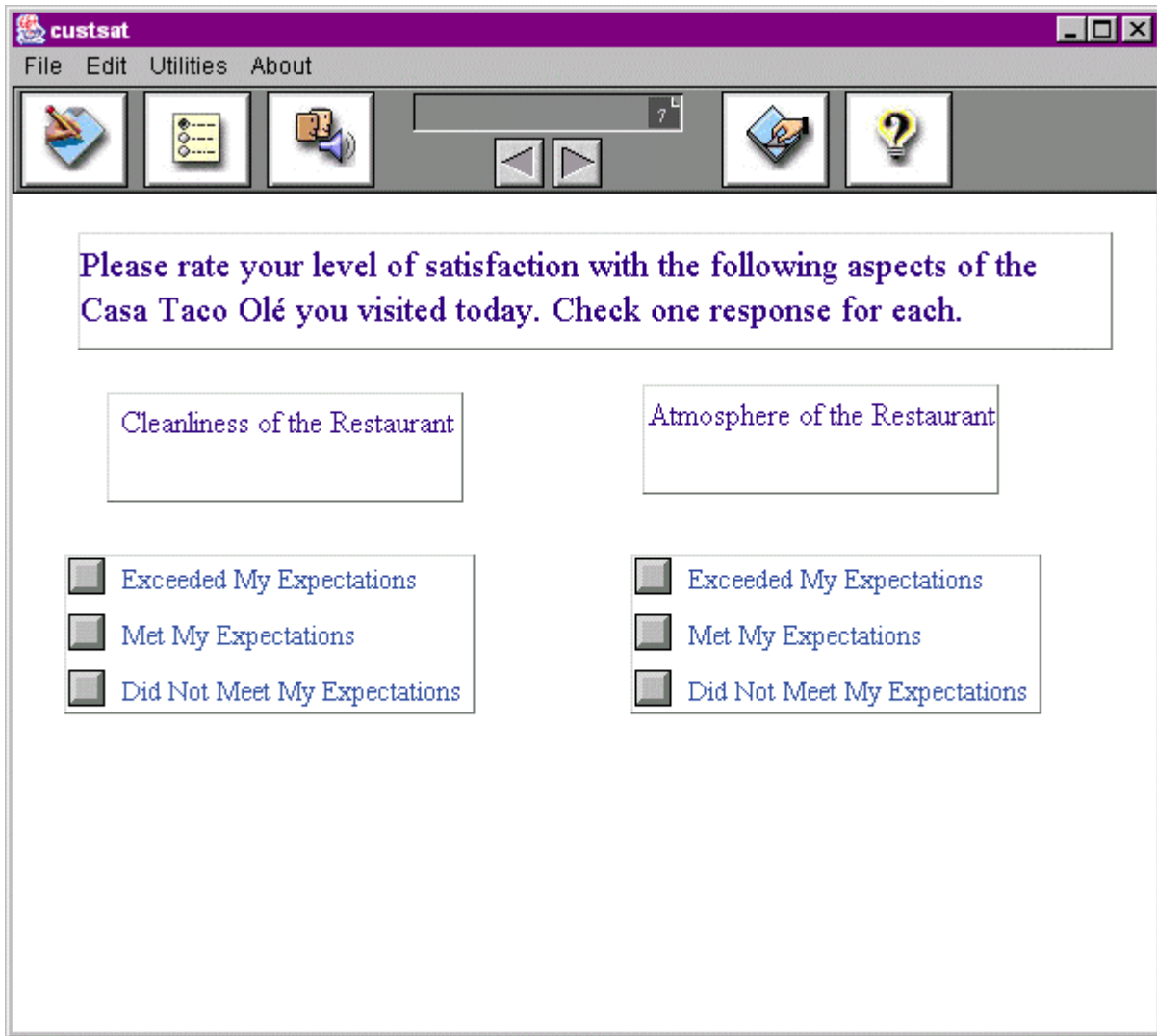
Click **Ok** when finished typing and formatting the text for this set of response items.

Open the *Question Editing* window once again, and type the following text for the second question on this survey page:

Atmosphere of the Restaurant

Click **Ok** when finished.

Then, open the *Answer Editing* window by clicking on the **Add Answer to Page** button again, and enter the same text that you used in the previous response set for this response set. Click **Ok** when finished. Refer to the figure below to see a sample of page seven of the survey.



Completed Sample Page Seven

The following section of this tutorial will take you step-by-step through creating a thank you page to end your survey.

Adding a Thank You Page

Now that you have finished adding questions and response sets to your survey, you may want to add one last page to the survey so you can add some brief text thanking respondents for taking the time to participate in the survey.

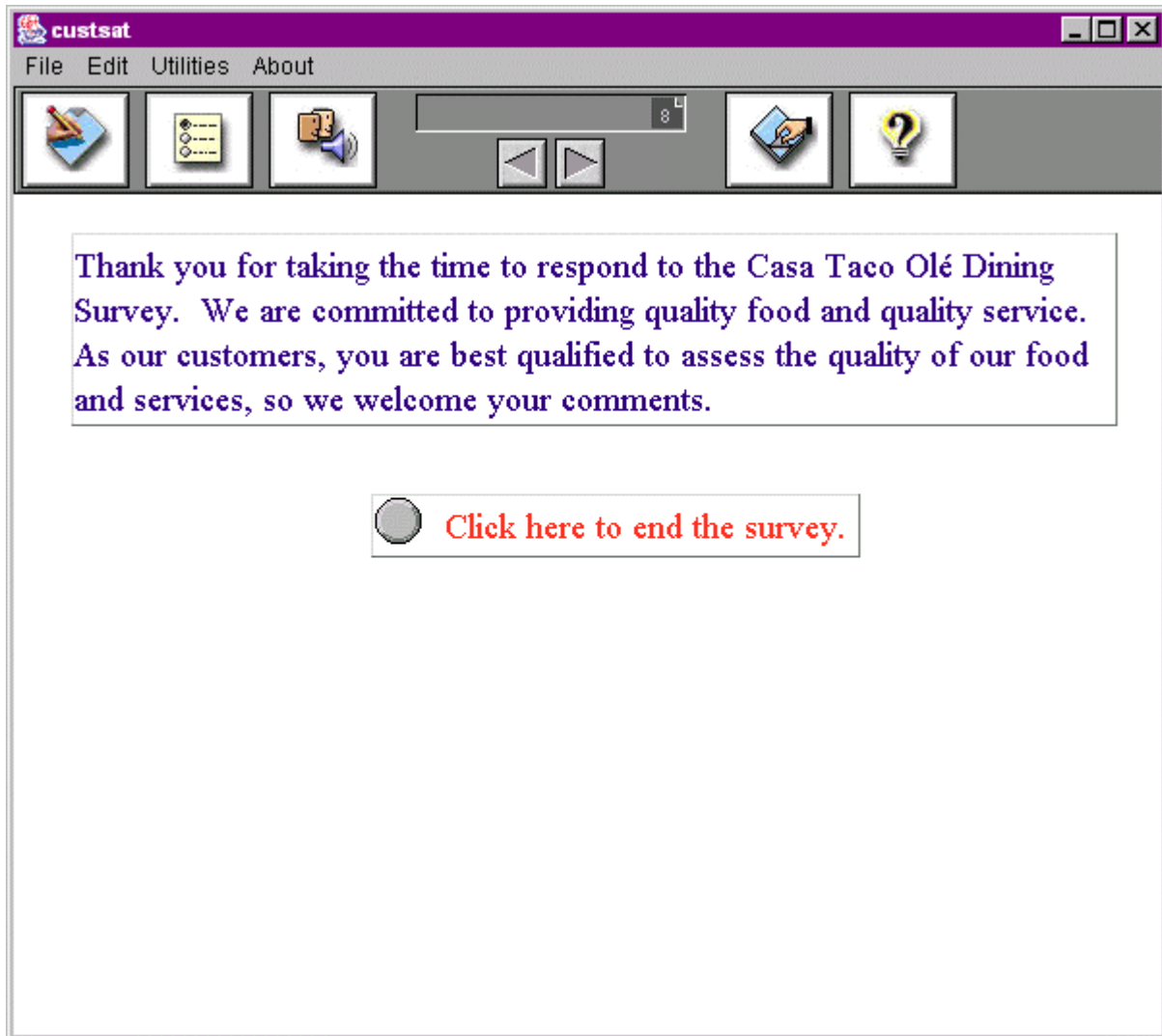
To add another page, click the **Append Blank Page** button located in the main toolbar of the Editor. When the new page is added to the questionnaire, open the **Question Editing** window by clicking on the **Add Question to Page** button located in the main toolbar. When the **Question Editing** window opens, enter the following text:

Thank you for taking the time to respond to the Casa Taco Olé Dining Survey.
We are committed to providing quality food and quality service. As our

customers, you are best qualified to assess the quality of our food and services, so we welcome your comments.

Click **Ok** when finished entering and formatting the text.

Once you have added a question frame to this page, survey respondents will need some way to end the survey. So, open the *Answer Editing* window by clicking on the **Add Answer to Page** button. Refer to the figure below for an example of how to prompt respondents to end the survey.



Sample Final Page of Survey

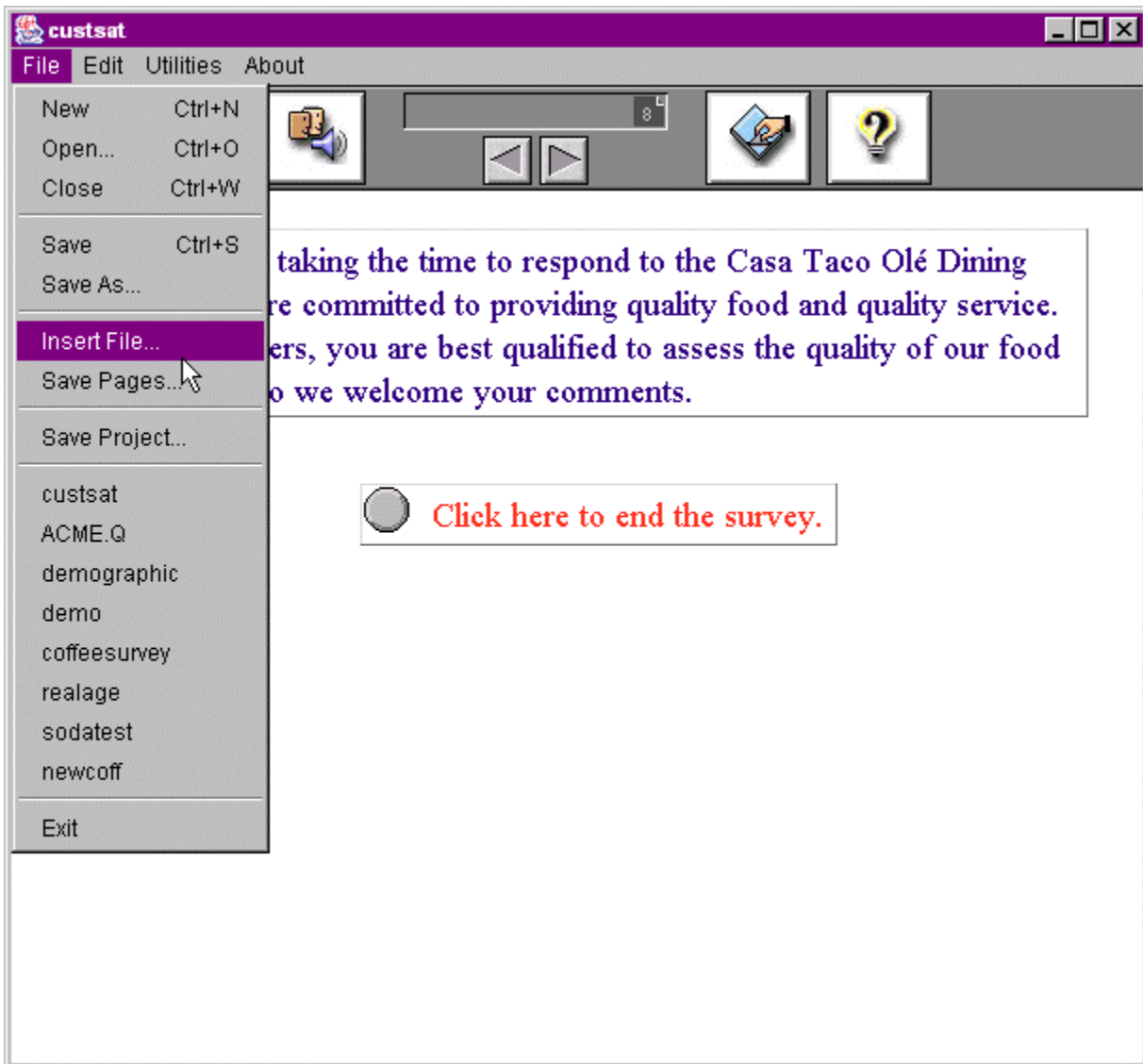
You have now completed the customer satisfaction survey. Be sure to save the questionnaire by going to the file menu and choosing **Save**. If you have not previously saved the survey, you will be prompted to enter a file name before clicking **Save**.

After reviewing a draft of the contents of the survey, the management of Casa Taco Olé wants to add some demographic questions so they can develop a better picture of whom they are serving. The

following section of this tutorial will walk you through inserting a previously created demographic survey into the customer satisfaction survey you just created.

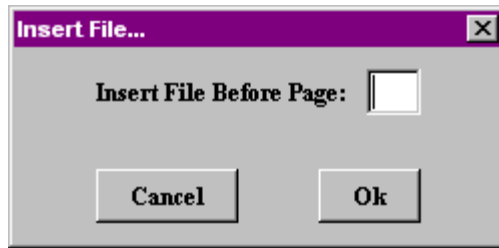
Inserting a Previously Saved Questionnaire File

To insert one questionnaire file into another questionnaire, first go to the **File** menu and select **Insert File**. (See the figure below.)



Selecting Insert File from the File Menu

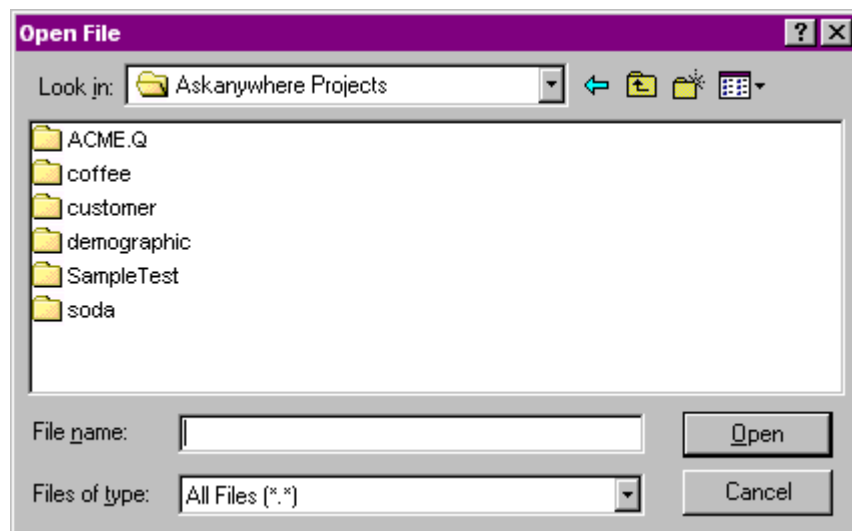
The *Insert File* window, pictured below, will open:



Insert File Window

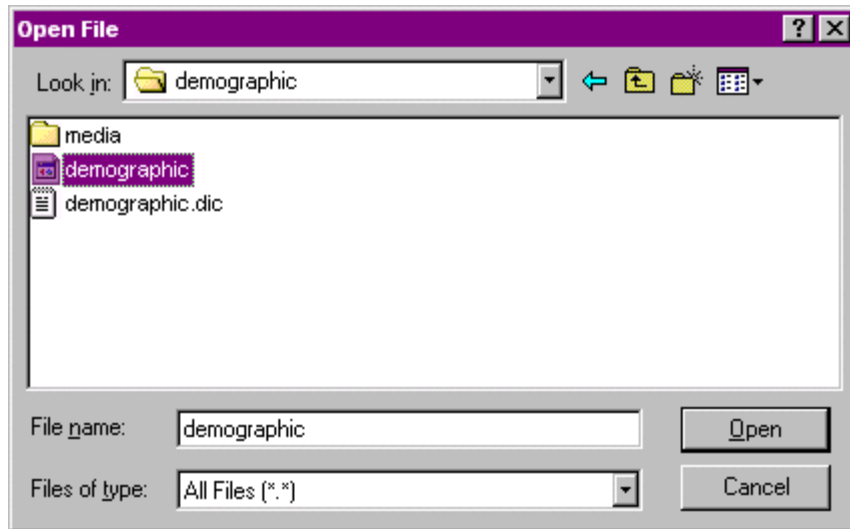
Next, enter the page number that you want to insert the file *before*. In this case, you would enter page 8, which is the last page—the thank you page—of the customer satisfaction survey you just created. Then, click **Ok**.

The *Open File* window, pictured below, will open:



Open File Window

Select the questionnaire file you wish to insert in the current questionnaire. In this case, you want to insert the demographic questionnaire that you created in the previous tutorial. This questionnaire is located in the **demographic** folder. So, you will need to double click on the **demographic** folder to open it, and then you will select the *demographic* file. (See the figure below.)



Selecting the Demographic Survey File

Once you have selected the file, click **Ok**.

The demographic survey should now be inserted in the customer satisfaction survey.

Note: The demographic survey, which contains questions regarding gender, age, marital status, education level, and annual income, for instance, was originally created as a separate survey. You may want to review the demographic questions to see if they are necessary or appropriate for this customer satisfaction survey.

Move through the survey, including the newly inserted pages, to determine if any changes need to be made to formatting.

Note: Because the demographic questions were originally created as a separate survey, the formatting (i.e. font style, size, and color) for both questions and response sets on these pages will be different than those of the customer satisfaction survey. You may want to change the font style, size, and color on these newly inserted pages to match those of the customer satisfaction survey pages.

Additionally, you may want to check not only the position and the size but also the number of questions and response sets per page for the demographic questions; some questions and response sets may be able to be combined on one page, thus shortening the overall page length of your survey.

On the first page containing demographic questions you want to add a brief introduction to the demographic questions. Go to the first page containing demographic questions, page eight, and click on the **Add Question to Page** button in the main tool bar of the Editor to open the **Question Editing** window. When the **Question Editing** window opens, enter the following text as an introduction to the demographic questions in your survey:

Answers to the following questions will be used for statistical purposes only.

Click **Ok** when finished typing and formatting your text.

Your customer satisfaction survey is now complete. Save any changes you have made by going to the file menu and selecting **Save** or by pressing **Ctrl + S**.

You may also want to test the entire customer satisfaction survey to see how it operates for respondents. You may test the survey by going to the **Utilities** menu and selecting **Test (Ctrl + B)**.