

Using Qualtrics Survey Software at UW

**Foster School of Business
case study**

Surveying diverse external audiences to launch new center at UW Foster School of Business

- Survey sent to 30,878 marketers:
 - Foster School of Business alumni
 - Purchased list of professionals
 - Several professional associations
- More than 1,400 completed survey for incentive: free membership in new Center for Sales and Marketing Strategy

Managing multiple audiences and lists

- Uploaded internal lists to Qualtrics panels
 - Small internal list of survey testers
 - Verified email and survey worked correctly
 - Foster Business School alumni
 - Separated into panels of 5,000 to improve delivery
 - Qualtrics matched responses to panel email address
- Coordinated survey distribution with partners
 - Custom email for each partner with anonymous survey link
 - Respondents using anonymous link prompted to provide name and email address in Qualtrics (display logic)

Customizing survey invitation

To: [View 1 members](#)

When:

Options to customize From Address, From Name, Reply-To Email

Message:

From Address
From Name
Reply-To Email
Subject

Alumni invitation ▾




Options to load HTML email template, personalize name with imbedded script

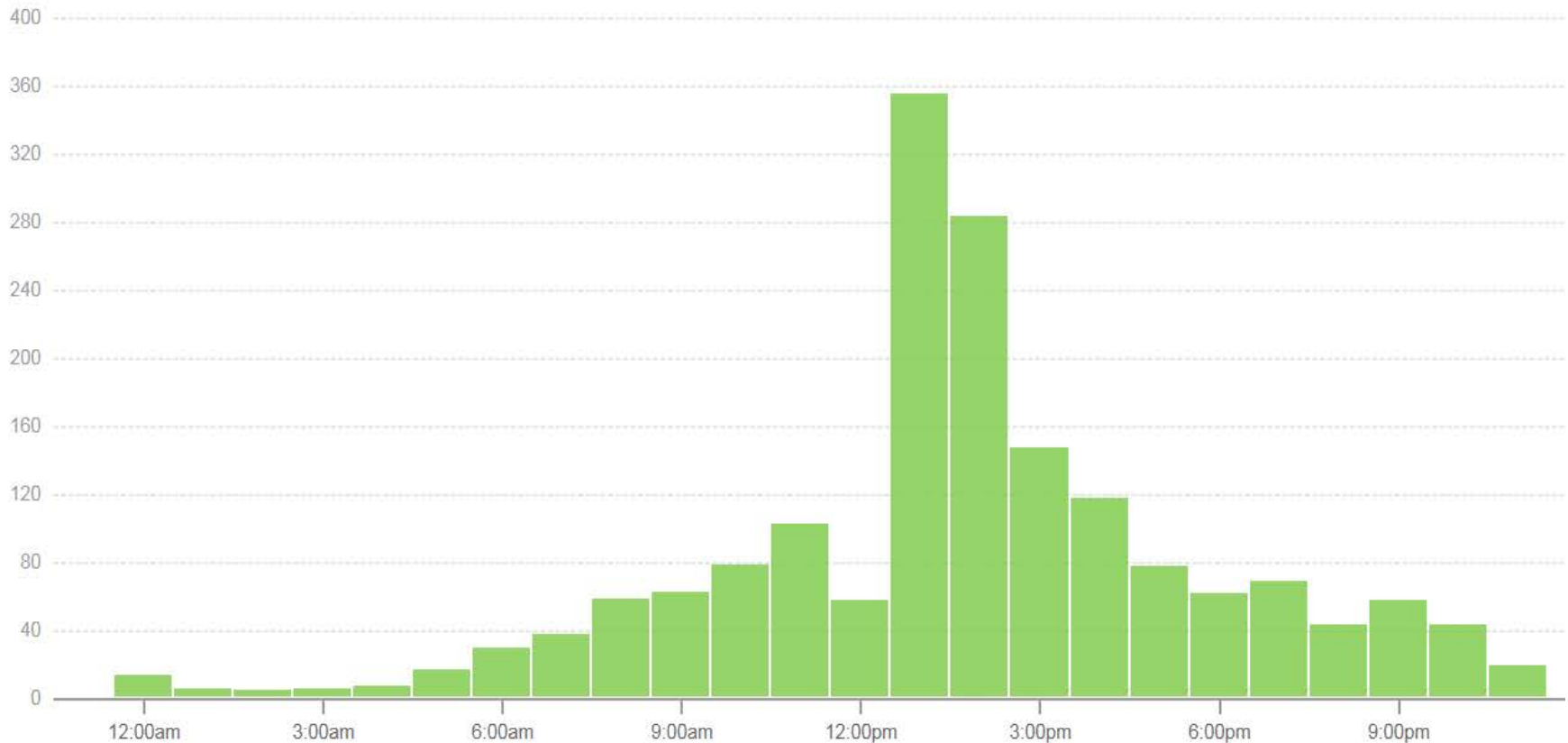
University of Washington Michael G. Foster School of Business
Center for Sales and Marketing Strategy

Dear \${m://FirstName},

The University of Washington's Foster School of Business is launching a nonprofit center focused on sales and marketing strategy. The mission of this new center is two-fold:

Analyzing survey results – best send times

Survey Start Times



Optimal times to send: Tuesday – Thursday around lunch time

Analyzing survey results – email performance

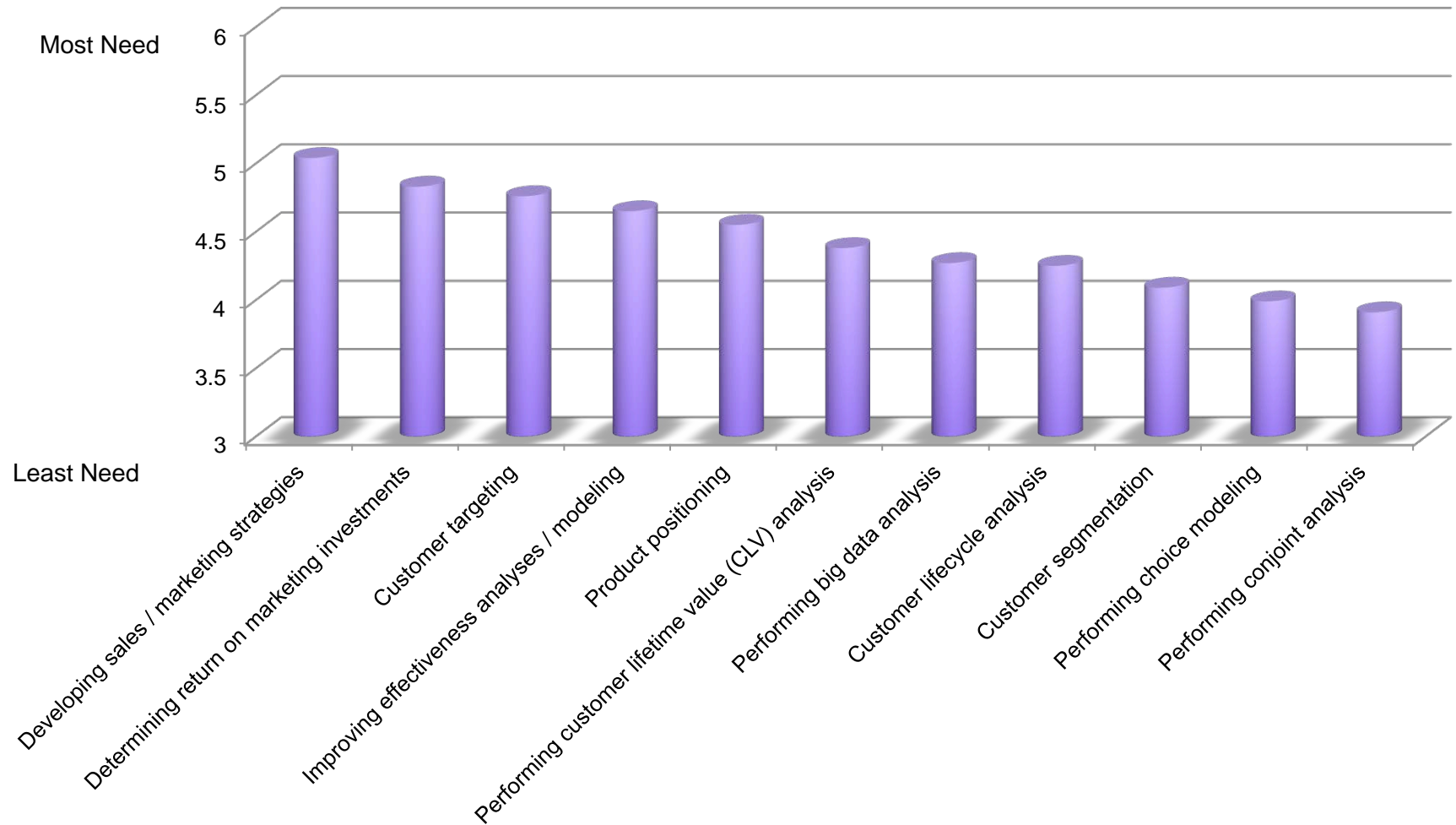
Recipient	Subject	Date	Emails Failed	Emails Bounced	Emails Sent	Surveys Started	Surveys Finished	Actions
Center alumni panel F	Influence sales and marketing research at the UW Foster School of Business	11 Apr 2014 2:00 PM	0	107	2,925	165	80	⌵
Alumni survey list E	Influence sales and marketing research at the UW Foster School of Business	10 Apr 2014 11:15 AM	0	146				
Alumni survey list D	Influence sales and marketing research at the UW Foster School of Business	10 Apr 2014 11:08 AM	0	123				
Alumni survey list C	Influence sales and marketing research at the UW Foster School of Business	10 Apr 2014 10:54 AM	0	152				
Center Alumni List B	Influence sales and marketing research at the UW Foster School of Business	10 Apr 2014 10:25 AM	0	154	2,927	164	101	⌵
Center Alumni Panel A	Influence sales and marketing research at the UW Foster School of Business	10 Apr 2014 9:23 AM	0	134	2,926	169	109	⌵
Center External	Influence sales and marketing research at the UW Foster School of Business	10 Apr 2014 9:21 AM	0	199	4,673	196	119	⌵
Center test panel	[test external from Josh] Influence sales and marketing research at the UW Foster School of Business	10 Apr 2014 9:09 AM	0	0	3	0	0	⌵
Center test panel	[test alumni from Josh] Influence sales and marketing research at the UW Foster School of Business	10 Apr 2014 9:05 AM	0	0	3	2	1	⌵
RobJoshAndrea	[test alumni] Influence sales and marketing research at the UW Foster School of Business	10 Apr 2014 8:19 AM	0	0	3	1	0	⌵
TMMBA_Prospectors_all_MBA_applicants_5294	Influence sales and marketing research at the UW Foster School of Business	09 Apr 2014 2:18 PM	0	536	5,283	311	196	⌵
External_EMBA_Prospectors_2861	Influence sales and marketing research at the UW Foster School of Business	09 Apr 2014 2:09 PM	0	285	2,862	128	71	⌵

- Edit Distribution
- Download Mailing History
- Send Reminder or Thank You
- Delete Distribution

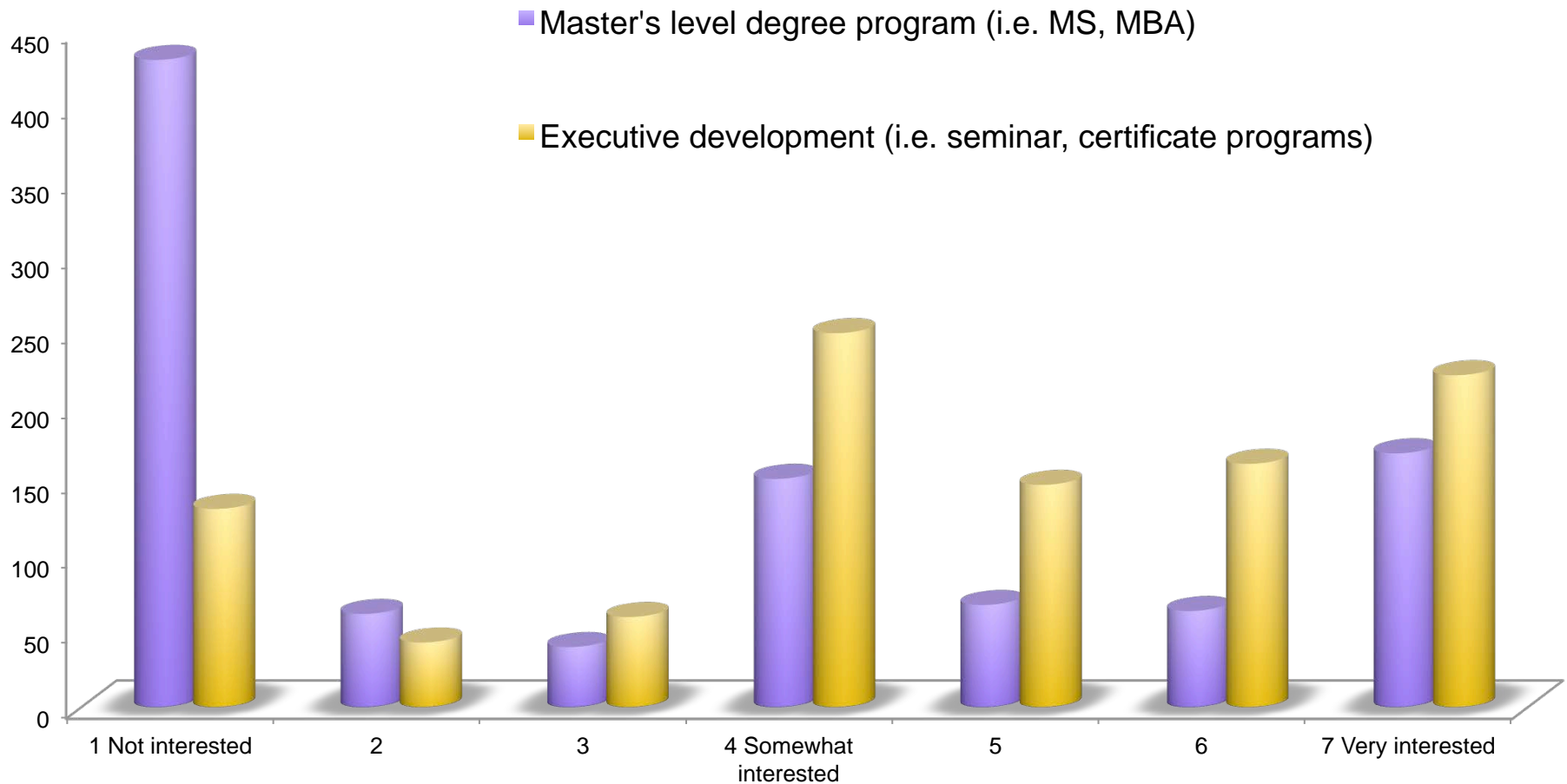
Email History

- Dashboard to monitor performance by panel list - bounces, surveys started & finished
- Easy way to send reminders & thank-you notes

Analyzing survey results – Top marketing needs for new center



Analyzing survey results – program interest



A few tips for new Qualtrics users

- Create a test panel to verify survey and email are sending, displaying, operating correctly
- Separate survey lists into panel groups around 5,000 with one or more small test groups around 300
- Consider testing alternate subject lines/messages to small groups to see which performs best
- Personalize survey if possible with imbedded script
- Personalize send-from address for your survey group
- Send final survey to test group to identify any problems, especially questions with high drop out rate
- Closely monitor results and send follow-up reminders
- Depending upon the audience, incentives can dramatically increase responses