

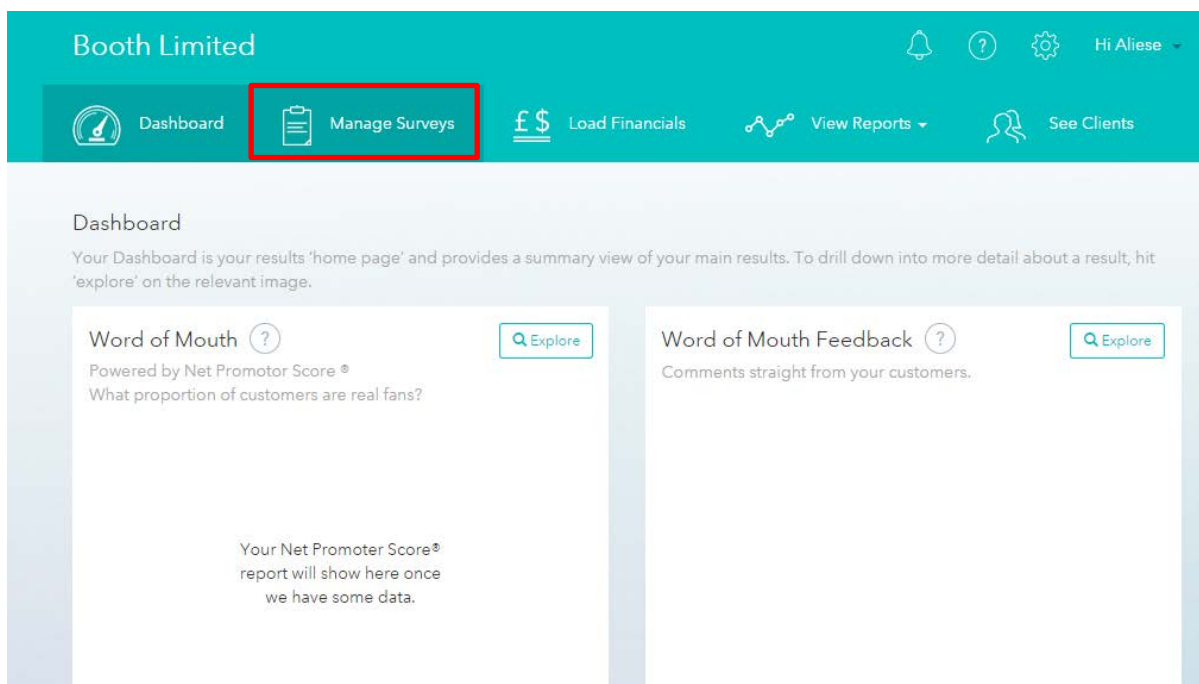
Getting the conversation started with your customers by sending the ranqx survey

Welcome to Meastrano and ranqx, we would like to get you started on how to set up and send your first survey.

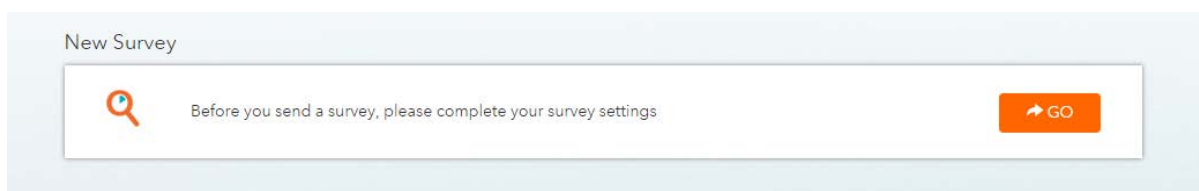
This tutorial will show a step by step guide on how to send individual and bulk emails to your clients to start the process of understanding how your customer's feel about you, and why they feel the way they do.

First of all we must sign into our account. Every time we sign in the first place we arrive will always be the ranqx dashboard. This gives you a quick glance of your Word of Mouth score, your feedback and your financial performance per annum.

Look for the "Manage Surveys" tab along the top of your dashboard and click once to open the survey page:



If you have not visited the manage survey page before ranqx will first ask you to complete your survey settings before proceeding:

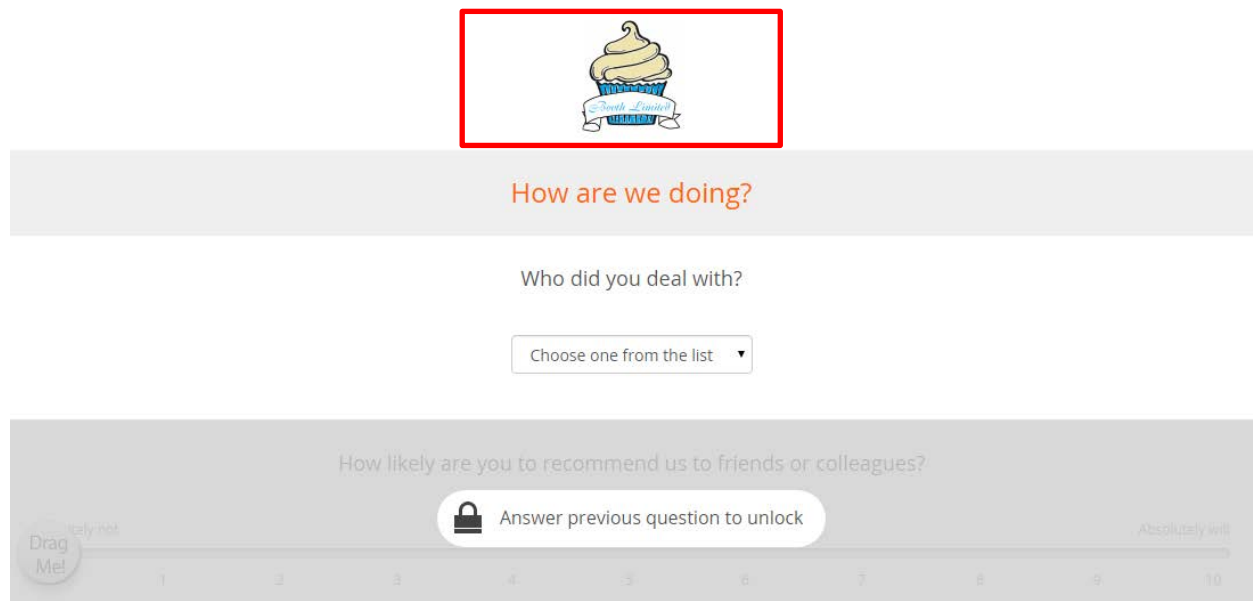


There will be four sections you need to set up, -Survey Modules, - Survey Logo, - Sender Details, and – Incentives.

The screenshot shows a dashboard with a left-hand navigation menu and three main sections. The navigation menu includes: Survey Settings (active), Reporting Entities, User Profiles, Alerts, Share Results, For Partners, Company Profile, and Payment. Section 1, 'Survey Modules', has two checked options: 'Word of Mouth Score' and 'Word of Mouth Feedback'. Section 2, 'Survey logo', contains a text box explaining that the logo is shown at the top of surveys, and a 'Current Logo' section with a 'Choose file' button (showing 'Chrys...m.jpg') and an 'Upload Logo' button. Section 3, 'Sender Details', has three input fields: 'Email Sender' (Booth Limited), 'Reply To email address' (aliese.booth@yourvantagepoint.com), and 'Company Short Code' (boothlimite1). Each field has a help icon.

Word of Mouth Score and Word of Mouth Feedback are automatically both selected. We recommend you keep it this way. If you are on the Starter plan you will only be able to see a set number of feedback results on your dashboard. You will need to upgrade to the business plan if you wish to see all feedback results at any given time.

The second section asks you to upload your logo – this will be placed at the top of your survey when dispatched to your clients as below:



The third section is important as this will let your customers know who the survey is from. This should automatically be filled in with the details of your account. You may wish to change the Sender Name and Reply To Address.

The last section to complete before you can send your first survey is the incentives section

4 Incentive

On Off

Charity incentives allow you to nominate up to 3 charities to support. As customers complete your survey, they vote for the charity they'd like their donation to go to. You set the maximum amount you want to donate and at the end of the survey period, you pay the appropriate amounts based on the proportion of votes submitted. Once you have paid your donation to the relevant charity, please hit 'Reset Incentives' to reset the counter.

List up to three Charities

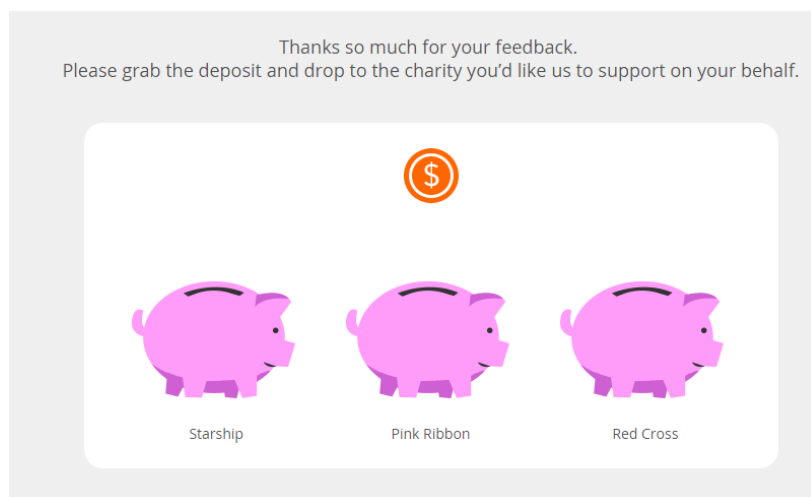
<input type="text" value="Starship"/>	<input checked="" type="checkbox"/> On <input type="checkbox"/> Off	\$0
<input type="text" value="Pink Ribbon"/>	<input checked="" type="checkbox"/> On <input type="checkbox"/> Off	\$0
<input type="text" value="Red Cross"/>	<input checked="" type="checkbox"/> On <input type="checkbox"/> Off	\$0

Maximum Donation Amount

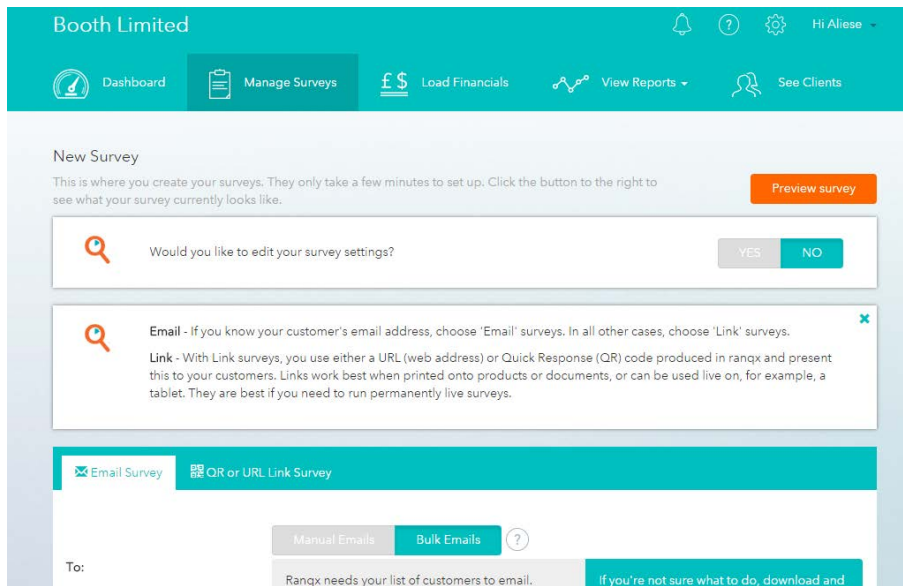
Amount per Response
Between \$1 - \$99

Here you can set the maximum amount you wish to donate to a charity from your survey campaign.

You can list up to three charities for your clients to choose from upon completing the survey, these can be turned on and off at any time. You can also change the amount that each survey accounts for. The minimum is set up at \$1 meaning that if your max was \$150 then 150 of your customer responses will go to a charity of their choosing:



Once the set up has been complete and saved ranqx will redirect you to the Manage Survey page where you can start thinking about what you want your survey to say. There will be a couple of options in terms of sending, manually per email or a bulk email send (recommended).

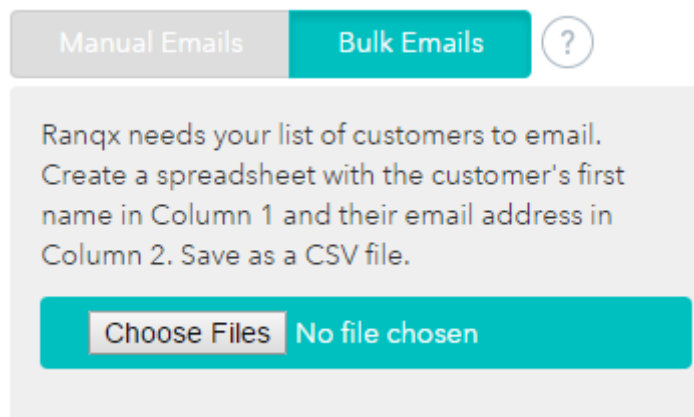


If you are sending a survey to your customer database than we recommend that you make use of the bulk email option.

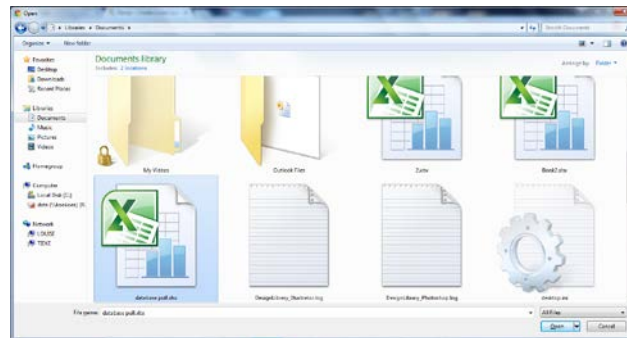
If you are unsure on how to set up a customer database you can download a sample template from the survey page for an example of a simple customer database format.



One column is assigned to first name the other for email address. This information may come from your CRM or customer/email data base.



Once you have completed your customer database and have saved as a .csv or if you already have one in the correct format click “choose file” and navigate to where you have saved your customer database file. Click Open.



Your customer database should now appear on the survey page with check boxes ticked next to your customers.

	First name	Email
<input type="checkbox"/>	First Name	Email
<input checked="" type="checkbox"/>	John	john@smith.com
<input checked="" type="checkbox"/>	Jane	jane.doe@test.com
<input checked="" type="checkbox"/>	Bob	bob@builder.com
<input checked="" type="checkbox"/>	Lara	lara@tomb.com

Scroll down the list and uncheck any that you do not want to send to, you can send invitations to do the survey to as many people as you wish.

If you want to send it to one or two individual people you can make use of the manual email option. This will prompt for a “To:” field to open for you where you can manually type in an email address.

To:

Manual Emails
Bulk Emails
?

Type an email address and hit Tab.

Sending your survey

Once you have settled on if you are sending a bulk or manual emails you can progress onto customizing your survey.

Ranqx has provided subject titles for you to choose OR you can edit one to suit your own needs. This is also true for the salutation you choose to use. We recommend an easy and well used “Hello” works well.

Sender Name: Booth Limited

Subject: Have your say - and help a charity

Salutation: Have your say - and help a charity
So what do you really think
Please take a couple of moments to tell us what you think
Penny for your thoughts
Your opinion counts - and will also help a charity
Tell us what you think, and help a favourite charity
How are we going - really?
Have your say
We're keen to lift our game. Can you help us - and a charity as well?
As a valued customer, we want your opinion

Email content: happy with your
ey.
vey.

Follow-up email: On Off

Schedule send: Now Later

Preview Email Save Draft Send

The body of the text is also already provided for you, be assured you can alter this text to suit your own tone of voice and needs for this email. We recommend you mention the donation to charities you have chosen as this will help the response rates of your customers.

Salutation: Hello

Email content: We see that you've recently purchased from us - and we trust you're happy with your purchase.
But to make sure we'd really value your opinion.
Could you please click the button below to complete our quick survey.
As a thank you, we'll make a charity donation for every complete survey.
Many thanks
Aliese Booth

Follow-up email: On Off

Schedule send: Now Later

Preview Email Save Draft Send

If you turn on the follow up email, ranqx will automatically send a reminder to people who haven't responded after a specified number of days.

Once you are satisfied with the content of your email click on "preview the content" to see an exact copy of what your customers will receive. Click send.

As soon as the email has been sent and customers start to respond your dashboard will update in real time to reflect your new scores and show any new feedback that has come through.

NOTE: If you wish to schedule your survey to be sent at a later time you can choose to send up to a week later – this will come in handy if you know when your customers are most likely to respond to your action.