SurveyMonkey®

User Guide

This guide will walk you through the information you need to get started using all the features that SurveyMonkey has to offer.

Throughout the guide you'll find links to our Help Center to learn more and get step-by-step instructions.

Learn best practices for every step of survey creation with Surveys 101.

Happy surveying!

Contents

Design a Survey

You can create a new survey from scratch, use an expert template, or even have us build your survey for you through our Survey Programming Services (at extra cost).

Creating a Survey

To create a survey, click **+Create Survey** at the top of any page in your account.

You can choose to:

- Build a New Survey from Scratch
- Edit a Copy of an Existing Survey
- Start from an Expert Template

➢ Learn more: Creating a Survey

Adding and Editing Questions

The first step to building your survey is adding questions. When you add a question to your survey, review the options and settings to fine tune each one to meet your needs.

➢ Learn more: Question Types

Using the Question Bank Library

SurveyMonkey's Question Bank contains hundreds of questions created and certified by our very own survey methodologists. Using Question Bank will ensure that the questions you are asking are methodologically sound, so you can rest assured that your survey will yield accurate results with minimal bias.

Question and Answer Piping

Use Question and Answer Piping to automatically include previously select answer choices in the question text or answer choices of a follow-up question. This feature allows you to further personalize your survey, which helps respondents feel more comfortable when submitting their answers.

➢ Learn more: Question & Answer Piping

A/B Tests (Random Assignment)

A/B Tests allow you to present different stimuli (text, images, or question wording) to defined percentages of respondents at random, to measure differences in response. The benefit is to introduce experimental variation into surveys.

➢ Learn more: A/B Tests (Random Assignment)

Adding Additional Text

You can add additional text into your survey design to provide extra context or description to your respondents.

➢ Learn more: Adding Text

Adding Images

You can add images into your survey design.

➢ Learn more: Adding Images or Pictures to a Survey

Adding Video

You can add video into your survey design.

➢ Learn more: Adding Video

Logic Options

Question Skip Logic

Add logic to answer choices to direct respondents to a future point in the survey based on their response to a question.

➤ Learn more: [Question Skip Logic](#)

Page Skip Logic

Skip respondents from one page to a specific page in the survey.

➤ Learn more: [Page Skip Logic](#)

Custom Variables

You can use custom variables to pass pre-collected information into your survey through the survey URL.

➤ Learn more: [Using Custom Variables](#)

Quotas

Add quotas to your survey to close your survey automatically once it reaches the maximum number of qualified respondents.

➤ Learn More: [Using Quotas](#)

Page Randomization

You can use Page Randomization to minimize order bias and improve overall data quality. This professional feature enables you to rotate, flip or randomize all pages in your survey, or a specific set of pages.

➤ Learn more: [Page Randomization](#)

Question Randomization

You can use Question Randomization to minimize question order bias and improve overall data quality. This professional feature enables you to randomize or flip all questions on a page, or only a specific set of questions.

➤ Learn more: [Question Randomization](#)

Block Randomization

With Block Randomization logic, you can rotate, flip, or randomize multiple groups of pages to test out a few ideas at once without order bias or survey fatigue. It's especially useful for concept testing.

➤ Learn more: [Block Randomization](#)

Survey Options

There are several Survey Options you can configure to fine-tune the appearance of your survey by showing or hiding certain elements such as a progress bar, required asterisks (*), and question numbering.

You can also change the survey language.

Changing the Survey's Look & Feel

There are many ways to customize the look and feel of your survey to complement your website or brand.

➢ Creating a Custom Theme
➢ Adding a Logo
➢ Hide the Powered by SurveyMonkey Footer

Collect Responses

Once you finish your survey design, you're ready to send it to respondents and collect responses.

Collecting Responses

What is a Collector?

A **Collector** is a means to distribute your survey to respondents and collect responses. The collector type you choose determines how your survey will reach your respondents.

You can create a Collector under the **Collect Responses** tab in your account.

Collector Types

➢ [Web Link](#)
➢ [Email](#)
➢ [Website](#)
➢ [Facebook](#)
➢ [Targeted Audience](#)

Collector Options

Collector Options enable you to customize your respondents' survey-taking experience. These settings control who can access your survey, how many times respondents can take the survey, what respondents see when they're done, and more.

➢ Learn more: [Collector Options](#)

Testing the Survey

After creating a collector and configuring its settings and restrictions, we suggest testing the survey from beginning to end to ensure that the survey functions as desired. When testing the survey via the collector itself, responses will be recorded. You can [delete test responses](#) before sending the survey out to respondents so they do not interfere with your real data.

➢ Learn more: [Testing Your Survey](#)

Analyze Results

As your survey collects responses, you can view, analyze, and export your results at any time in the **Analyze Results** section.

Viewing Your Results

In the Analyze Results section of your survey, there are three tabs at the top of the page that allow you to view your data in different ways.

Question Summaries

The **Question Summaries** tab will show by default. Here you can view:

- The response counts and percentages for all close-ended questions in your survey
- Weighted averages
- Open-ended comments
- Dynamic charts

Data Trends

The **Data Trends** tab shows you how your response data has changed over time. For example, if you've been using the same customer satisfaction survey for the last year, and you're interested to see if the number of Extremely Satisfied customers has increased or decreased, use Data Trends to visually assess whether this number has gone up or down over the course of the year.

➢ Learn more: Data Trends

Individual Responses

The **Individual Responses tab** view each respondent's individual answer set.

➢ Learn more: Individual Responses

Custom Charts

The Analyze Results section automatically generates eye-catching charts to represent your data. You can change the chart type and display options to customize the way your data displays.

➢ Learn more: Creating & Exporting Custom Charts

Text Analysis

Use our Text Analysis tool to perform quantitative research on open-ended questions. You can categorize and filter respondents' comments, and the cloud and list views instantly reveal important words and phrases.

➢ Learn more: Text Analysis

Using Rules to Analyze Your Data

Rules allow you to analyze your data in a way that's most meaningful to you.

Filter Rules

Use Filter rules to focus on a specific subset of your data based on certain criteria that you define.

➢   Learn more: Using Filter Rules

Compare Rules

Compare rules allow you to cross-tabulate your data to compare the answer choices to one question across the rest of the survey by producing a side-by-side comparison of two or more survey questions.

➢   Learn more: Using Compare Rules

Show Rules

Use Show rules to display only certain survey questions or pages.

➢   Learn more: Using Show Rules

Views

A View is a snapshot of your data made up of any Filter, Compare, or Show rules applied to the survey results. You can save views so that you can toggle back and forth between different views of your data at any time, without having to constantly recreate them.

➢   Learn more: Views

Exporting Results

Export survey data to download an offline copy of your survey results. We have several export examples available to help you choose the export format that's right for you.

You can also export survey results with any Filter, Compare, and/or Show rules applied. By exporting either the Current View or a Saved View of your data, you can easily create customized downloads that meet your specific reporting needs.

You can choose from three export types, each of which is available in several formats.

All Summary Data

Download an All Summary Data export for a presentation-ready overview of your survey results.

All Responses Data

All Responses Data exports let you see how each respondent answered the survey. This export type is also good if you want raw data to create charts or do analysis on your own.

All Individual Responses

The same export formats are available for both All Responses Data and All Individual Responses. The All Individual Responses export type simply pre-selects PDF so you can quickly download the same information you see in the Individual Responses tab.

➢   Learn more: Exports

Managing Your Surveys

You can view and manage all surveys from the Home page in your account.

➢ Organizing Surveys into Folders
➢ Deleting a Survey
➢ Clearing Survey Responses
➢ Transferring a Survey to Another Account
➢ Copying a Survey to Another Account

Have Questions?

Search our Help Center to find instant answers.