

Survey Monkey Tips

For Insurance Agents & Agencies



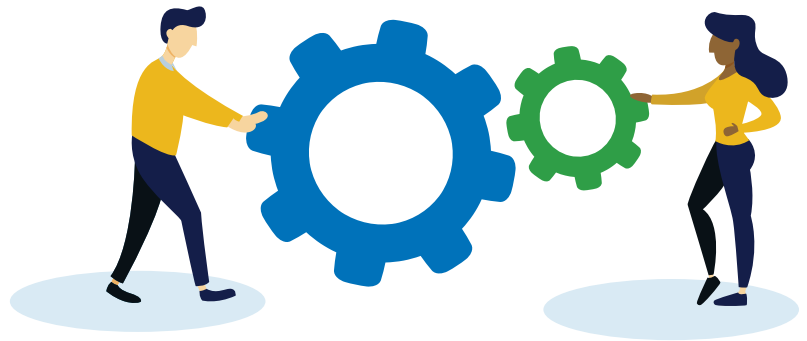
Sending surveys out to clients & prospects is a great way to find out how your insurance agency is doing in the eyes of customers – and what they would like to see from you! With no prior knowledge, creating an effective survey may seem hard, but Agent Pipeline has created this guide to help you create an effective survey on SurveyMonkey.

The first thing you will need to do is decide the objective of the survey. For example, do you want to take a survey of the demographics of your clients, what they would like to see from you, or even their interests to help better your insurance agency's marketing campaigns?

Having a focused objective can help you make sure the survey only asks the questions that you need. To help narrow down your survey's purpose, ask yourself questions such as: ***Who else will be seeing and using these responses? What insights am I hoping to gain? What decisions am I ultimately looking to make?***

Once you understand the purpose of the survey, you can start to create it. We will go through how you can create a study that will give you valuable insights about your insurance agency through these tips:

- Using *Effective formatting*
- Asking the same question(s) *over time*
- Minimizing the *number of questions* you ask on a survey
- Helping respondents *feel comfortable* from the start
- Keeping your questions *straightforward*
- Clarifying potential *misunderstandings*
- Ensuring that *every respondent* gets relevant questions
- Steering clear of *matrix type* questions
- Choosing *words over numbers* when creating answer choices



Once you've covered these tips, ***creating a survey will be all the more easier to do.***

10 Tips for an Effective Survey

1. **Formatting** – group similar questions together to keep the survey logical and focused – use page breaks, titles, and instructions to help people understand what is being asked and why.

Customer Satisfaction Survey Template

Overall Satisfaction

1. How likely is it that you would recommend this company to a friend or colleague?

NOT AT ALL LIKELY EXTREMELY LIKELY

0	1	2	3	4	5	6	7	8	9	10
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2. **Ask often** – Using the same questions in a series of surveys or even using the same survey over time is a great way to build a baseline and measure changes in clients attitudes.
3. **Be concise** – respondents don't like surveys that are too long. So, think about the number of questions you really want to ask.
4. **Ease into it** – Save essential questions about personal or sensitive information until the end of the survey.
5. **Keep specifics** – Create survey questions that cover one idea at a time to ensure respondents know what you are asking. Avoid vague, general, and multi-part questions.

Preview

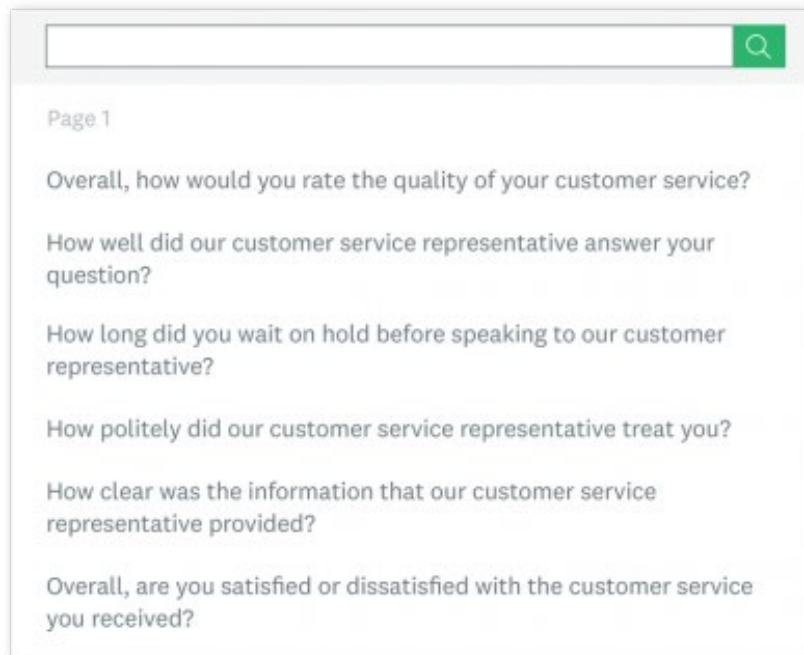
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How likely is it that you would recommend this company to a friend or colleague?

Overall, how satisfied or dissatisfied are you with our company?

Which of the following words would you use to describe our products? Select all that apply.

6. **Clarity** – Spell out things that can be interpreted more than one way.



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Overall, how would you rate the quality of your customer service?

How well did our customer service representative answer your question?

How long did you wait on hold before speaking to our customer representative?

How politely did our customer service representative treat you?

How clear was the information that our customer service representative provided?

Overall, are you satisfied or dissatisfied with the customer service you received?

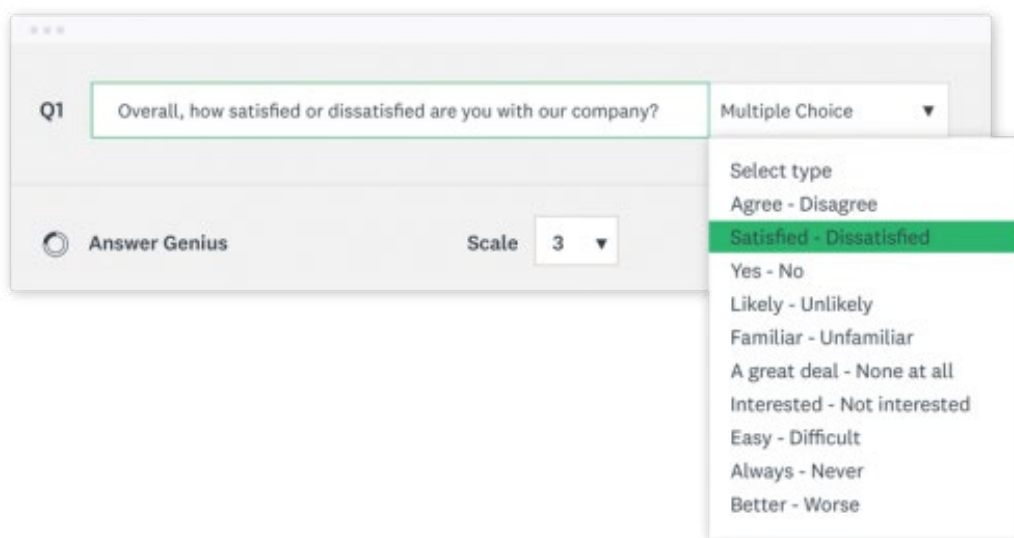
7. **Be relevant** – make sure your survey keeps respondents focus by only showing questions that apply to them. You can use logic to eliminate irrelevant questions.

Skip Logic

Skip logic lets you direct respondents through different paths in a survey based on one or multiple conditions. There are three types of skip logic:

Skip Logic Type	Description
Question Skip Logic	Applied to a question. Lets you skip respondents to a future question or page in the survey based on the answer choice they select.
Page Skip Logic	Applied to a page. Lets you skip everyone that reaches the page to a specific destination later in the survey—like a later page or the end of the survey. Unlike Question Skip Logic, Page Skip Logic doesn't depend on respondents' answers to specific questions—it's simply activated when a respondent reaches that page, and clicks Next.
Advanced Branching	Applied to a page. Lets you skip respondents to future points in your survey, show or hide questions, show or hide pages, or invalidate questions based on multiple conditions. You can build conditions based on a respondent's answers, custom data from Contacts, and custom variables. If you have Advanced Branching in your account, it replaces Page Skip Logic, so you can also use this feature to skip respondents to a designated page no matter what answer they select.

8. **Avoid yes/no questions** – questions like this do not capture people on the fence or any nuances about a person's opinion.
9. **Avoid the matrix** – When given a matrix, respondents will typically focus on filling out the grind instead of carefully answering each question; this will damage the quality of your results
10. **Use words instead of numbers** – when you are creating answer choices on a “scale” use options like “slightly satisfied,” “extremely satisfied,” or “not satisfied at all” instead of using numbers. This make the choices more clear and gets rid of any possible confusion on how the scale works.



The screenshot shows a SurveyMonkey question editor interface. The question text is "Q1 Overall, how satisfied or dissatisfied are you with our company?". Below the question, there is a "Multiple Choice" dropdown menu. The menu is open, showing a list of answer choice templates. The "Satisfied - Dissatisfied" option is highlighted in green. Other options include "Agree - Disagree", "Yes - No", "Likely - Unlikely", "Familiar - Unfamiliar", "A great deal - None at all", "Interested - Not interested", "Easy - Difficult", "Always - Never", and "Better - Worse". To the left of the dropdown, there is a radio button labeled "Answer Genius" and a "Scale" dropdown set to "3".

With that, you know how to do a survey that brings in the responses you need to make better decisions!

For more information on using data to improve your customer experience, contact Agent Pipeline at [800.962.4693](tel:800.962.4693) or www.agentpipeline.com