Agent Pipeline
AN INTEGRITY COMPANY

How to Use Survey Monkey
For Insurance Agents & Agencies

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Sending surveys to clients is a great way to evaluate how your insurance agency is doing in your clients' eyes and **gather data that you can use to improve how you conduct business.** *If you've never created a survey before – you're in luck! Agent Pipeline has put together a step-by-step guide on creating a free study on one of the internet's most popular survey platforms*
   – Survey Monkey.

Firstly, you will need to create an account on Survey Monkey's website – there are paid options, but **the free option will work for you at this time.** If you are interested, you can check out the different paid options to see which best fits your insurance agency's needs.

Now that you're logged in let's get started.

Create a Survey

To start creating a survey, click **Create Survey** in the upper-right corner of your account. Then you will choose from one of the following options. The options here are the three best to explore when you are creating your first survey.

Start from Scratch
   This will start you with a blank page.
You will be able to add questions using the tools located on the left to build the survey. If you have already written questions that you want to copy and paste – click **My questions are already written.**

Start from a Template
You can also create a survey based on one of the templates available on Survey Monkey. Use the drop-down menu to look through and choose a template that seems right for you. **Clicking on a template will allow you to learn more about it and preview the survey questions.**

Build it for Me
This option will create a survey based on your objective for the survey. You will answer some simple questions about yourself and your goals for the survey. Then, **Survey Monkey's Genius Assistant** gives you **recommendations to finish personalizing the survey questions and design.**

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Add Questions and Pages

Once you've finished step 1, **use the left sidebar to add questions or to choose prewritten questions** from Survey Monkey's question bank. To further customize questions, you can apply question settings.

If your survey is lengthy, you can **break it up into multiple pages.** This helps you to break the study into sections so that it is easier for clients to take. **Each time they finish a page, their responses are saved.**

If you opted for a template, **review it to customize the questions and answers to ensure they're relevant to your survey goals.** You also might want to add some more questions to the template or delete questions that aren't relevant to your objective.

Apply Logic

After survey questions and pages are created, it's a good time for you to **apply logic to the survey (if needed).** This can help you get better data by creating a more personalized experience for the client.

Skip Logic can control which questions a client will take based on their previous answers. For example, users who specify they feel less than satisfied with their experience may be shown various questions moving on than those who show they are delighted and vice versa.

Customize the Design

After creating your questions and applying logic, you can fine-tune your survey's look and feel with Survey Monkey's design and display options. This includes **showing or hiding elements, adding your insurance agency's logo, or creating a custom theme for your insurance agency.**

Preview and Send

Always make sure you preview your survey before sending it out to ensure there are no mistakes or issues with the logic. Once you are ready to send it out, create a collector to get responses back from clients.