

5 Ways to Use Forms & Surveys



Agenda

Overview of GrowthZone Forms/Surveys

5 Ways to Use Forms & Surveys

1. *Member Satisfaction surveys*
2. *Information gathering*
3. *Scholarship application*
4. *Informal voting*
5. *Use survey + report to update smart lists*

Sharing Surveys

View Responses

- *Associate Response to Contact*
- *Download all Responses*


Form Response Report

Forms/Surveys Overview

The **Forms/Surveys** module enables you to quickly create and publish custom web forms and surveys

- *Send targeted surveys to members and visitors*
- *Collect important survey data*
- *Store information gathered within a contact's profile*
- *Upload documents*
- *Render the data in easy to understand/useful ways*

Results: 9

Form Name	Form Response Id	Form Response Date	Contact Name	First Name	Last Name	Email	Interest
Form 2022	272474	1/26/2022 10:31 AM	Gavin Hayes				No, thank you.
Form 2022	272479	1/26/2022 10:34 AM	Super Duper				No, thank you.
Form 2022	283894	2/16/2022 11:25 AM	Shawn Ashmore	Shawn	Ashmore	shawn.ashmore@mailinator.com	No, thank you.
Form 2022	283893	2/16/2022 11:25 AM	Ghostie Rooster	Ghostie	Rooster	ghostie.roo@mailiantor.com	Yes, please!
Form 2022	272471	1/26/2022 10:30 AM	Cally Cupcakes				Yes, please!
Form 2022	272477	1/26/2022 10:32 AM	Freckles Icelandic				Yes, please!
Form 2022	283895	2/16/2022 11:26 AM	Shelli March	Shelli	March	shelli.march@mailinator.com	Yes, please!
Form 2022	272475	1/26/2022 10:32 AM	Stacy Volunteer				Yes, please!
Form 2022	272478	1/26/2022 10:33 AM	Cheri Meyer				Yes, please!
Count 9							

1. Member Satisfaction Surveys

A membership satisfaction survey is a simple tool for checking in with your membership and seeing what is important to them. It's a chance to address issues and encourage long-term membership and regular renewals.

Some of the subjects could include:

- *Benefits of membership*
- *General satisfaction*
- *Meeting times, frequency, and duration*
- *Barriers to participation*
- *Ideas for improvements*
- *Topics of most and least interest*

1. Member Satisfaction Surveys

5 Tips for Creating an Effective Member Survey:

1. *Set Clear Objectives*
2. *Keep it Short and Simple*
3. *Test it and Time it Right*
4. *Promote it*
5. *Share the results*

Source: [Why Your Organization Needs a Member Satisfaction Survey + 20 Questions](#)

2. Information Gathering

We all need data on the users that matter to us most.

In many cases, to get this precise data to make an impact on our marketing and business efforts, we need to have **data forms** to collect and capture information directly. This helps automate data collection, thus saving time and creating more accurate reports.

2. Information Gathering

Ask two questions:

1. What information should be collected?
 - *(This is the WHAT of the form)*
2. What is the reason we want this data?
 - *(This is the WHY of the form)*

Collecting the data you want or need from your users can be critical for marketing and growing your business, and forms are really the way to make that happen.

Source: [The importance of capturing data via forms](#)

Scholarship Applications

Digitize your application process! By using forms and surveys to collect, analyze, and store scholarship applications, you streamline your process AND have essentially infinite storage capability.

No more worries about if your scholarship director leaves the organization, or if their computer crashes- all that data is safe in your GrowthZone database, and you have an easily accessible history of all your applications.

3. Scholarship Applications

Your Scholarship application form can:

- *Collect applicant data*
- *Pose essay questions*
- *Include file uploads for documents, photos, etc*
- *Print applications for board review*

Ready to vote on a winner? That brings us to...

4. Informal Voting

While not appropriate for secure voting scenarios (such as needed for some elections), the Forms & Surveys module is perfect for situations where a non-scientific vote is needed.

4. Informal Voting

Whether it's polling members on their membership benefits, collection feedback on events, or having your board of directors vote on a scholarship winner, creating a simple form with voting options allows recipients to easily respond AND allows you to track, match, store, and report on responses.

5. Forms + Reports + Lists = SMART!

Want to update a particular committee list automatically?

1. *Use a form to report interest:
“Which committee would you like to join?”*
2. *Create a report (or reports!) that pulls the desired response and save it*
3. *Point the appropriate committee list(s) to the saved report(s)*

Every night the system will run the report on your form results and update the email list or committee automatically!

KB: [Dynamically Update Contacts in Lists/Committee from Report Results](#)

5. Forms + Reports + Lists = SMART!

Example:

- *Form w/multi-choice response:*
 - Technology Committee
 - Advocacy Program
 - Community Action
- *Form Response Report per response, saved*
- *List per response, pointed to appropriate report results*

Share Form

There are a variety of ways that you can share your form:

- *Sharing using the form URL*
- *Sharing using the form Share link*
- *Publishing a form/survey to your website*

Share Form: Form URL

Once the form is generated, two URLs are available for sharing the form:

- **Public Form Url:** *This URL should be used when you wish to link the form to your web-site and format using templates you have designed for your web-site*
- **Secure Form Url:** *This URL should be used when you wish to send the link via email, or other method. This will generate a basic form, without any formatting*

Public Form Url


<https://cherissandbox.growthzoneapp.com/ap/Form/Fill/r6Daku7P>

Secure Form Url

<https://cherissandbox.growthzoneapp.com/ap/Form/Fill/r6Daku7P>

KB: Sharing a Form using the URL

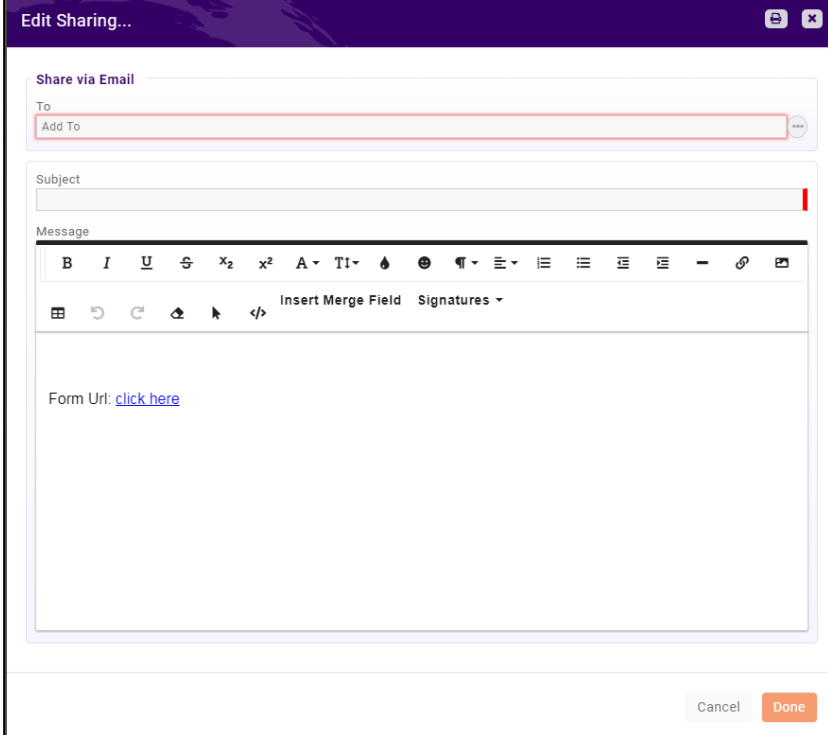
Share Form: Form Share Link

You can share the form by clicking the  icon – the system will automatically populate contact information

For Example – you could easily send the form to all event attendees

Edit the email as needed...

KB: [Sharing a Form using the Share Link](#)



The screenshot shows a window titled "Edit Sharing...". Inside, there is a "Share via Email" section with a "To" field containing "Add To" and a "Subject" field. Below these is a "Message" field with a rich text editor toolbar. The toolbar includes buttons for Bold (B), Italic (I), Underline (U), Bulleted List, Numbered List, Text Color (A), Text Background Color (T), Font Size, Text Color, Bulleted List, Numbered List, Indent, Outdent, and a link icon. Below the toolbar, there are options for "Insert Merge Field" and "Signatures". The message body contains the text "Form Url: [click here](#)". At the bottom right of the window are "Cancel" and "Done" buttons.

Share Form: Publish to Website

Education

Any training or education you've received

Education Level

High School Associate Degree

Bachelors Degree Masters

Doctoral Not Applicable

I'm not a robot

Using the public modules available, you can set up a public URL to add to your website navigation for your website visitors to access.

You would then add the URL to your site navigation for anyone to find and complete!

KB: [Publish a form to your website](#)

View Individual Form Responses

KB: View Individual Form Responses

Training Survey Form Responses

Search... Show only... Customize Results...

Result Count: 5

From	Created Date
Cheri Petterson	9/6/2018 12:25 PM
209.212.33.119	9/6/2018 12:06 PM
209.212.33.119	9/6/2018 9:44 AM
209.212.33.119	9/6/2018 9:43 AM
209.212.33.119	9/5/2018 4:37 PM

Edit User Response < 1 of 5 > [Print] [Close]

Public Fields

On a scale of 1 - 10 (1 is lowest 10 is highest) - how would you rate Dairy Queen?	5
How much would you pay to spend a day in an ice-cream factory?	\$99.00
What percentage of time do you spend eating ice-cream during the summer?	25
Pick your favorite ice-cream	Rocky Road
What is your favorite cookie?	Chocolate Chip
Please share your favorite cookie recipe	https://mmp4production.blob.core.windows.net/publicfiles/3050959a-df00-4c21-a418-67b8b5d924be/c6aa5738-e64e-4484-99eb-d711b07436f2
What day is Christmas this year?	12/25/2018
What would you like in your Christmas Stocking (pick as many as you want)	Keys to a New Car,Candy Canes,A Million Dollars
First Name	Cheri
Last Name	Petterson

Fields

Filter...

Should this person be on the Nice List?

Yes

Delete Cancel Done

Associate Form Responses to Contacts

You can associate a form response to a contact in your database, by clicking into the IP Address listed in the **From** column

You must include **Form: First Name**, **Form: Last Name**, and **Form: Organization** OR **Form: Email Address** in your survey to have sufficient information to match the response to a contact in your database.

KB: [Associate Form Responses to Contacts](#)

Associate Form Responses to Contacts

Training Survey Form Responses

Search... Show only... Customize Results...

Result Count: 7

From	Created Date
209.212.33.119	9/6/2018 1:38 PM
209.212.33.119	9/6/2018 1:28 PM
Cheri Petterson	9/6/2018 12:25 PM
209.212.33.119	9/6/2018 12:06
209.212.33.119	9/6/2018 9:44
209.212.33.119	9/6/2018 9:38
209.212.33.119	9/5/2018 4:37 PM

Edit Find or Create Contact

Data from Form

First Name Claude	Last Name Monet
Email claude@mailinator.com	Organization Name

Potential Matches

Select Contact From The Matches Below or Create New Contact

	Person Name	Primary Company	Last Communication Date	Email Address	Membership Status	Estimated Number Of Communications
<input type="radio"/>	Antoine Monet		6/21/2018	claude@mailinator.com	Non Member	1
<input type="radio"/>	Marius Monet		6/21/2018	claude@mailinator.com	Non Member	1
<input type="radio"/>	Claude Monet	Monets Landscaping	7/27/2018	claude@mailinator.com	Active	15

Select Organization From The Matches Below or Create New Organization

Use suggested - We've found a possible match
 Find existing - Search your database
 Create new - Create a new organization record

-- Select an Organization Contact --

Cancel Done

Download All Form Responses

You can download all the responses to a particular form in an Excel spreadsheet by going to the Forms module, finding the form, and clicking the Download Form/Survey Responses icon.



The screenshot shows the GrowthZone Forms module interface. At the top, there is a search bar containing '2022', a 'Show only...' dropdown, a 'Customize Results...' button, and a 'Criteria: 2022 x [Clear All]' button. Below this is a table with the following columns: Name, Form Type, Total Responses, Latest Response, and Actions. The table contains two rows:

Name	Form Type	Total Responses	Latest Response	Actions
2022 Scholarship Applications Vote	User defined	0		[Settings] [Share] [Close] [Copy]
Form 2022	User defined	9	2/16/2022	[Settings] [Share] [Download] [Close] [Copy]

A red arrow points to the 'Download' icon (a downward arrow) in the Actions column of the 'Form 2022' row. A tooltip below the icon reads 'Download Form/Survey Responses'.

KB: [Download All Form Responses](#)

Download All Form Responses

FormResponseId	FormName	CreatedDate	Campaign	Medium	Content	Form - First Name	Form - Last Name	Form - Email	Interest
272471	Form 2022	1/26/2022							Yes, please!
272474	Form 2022	1/26/2022							No, thank you.
272475	Form 2022	1/26/2022							Yes, please!
272477	Form 2022	1/26/2022							Yes, please!
272478	Form 2022	1/26/2022							Yes, please!
272479	Form 2022	1/26/2022							No, thank you.
283893	Form 2022	2/16/2022				Ghostie	Rooster	ghostie.roo@mailiantor.com	Yes, please!
283894	Form 2022	2/16/2022				Shawn	Ashmore	shawn.ashmore@mailinator.com	No, thank you.
283895	Form 2022	2/16/2022				Shelli	March	shelli.march@mailinator.com	Yes, please!

Form Response Report

The **Form Response Report** allows you to download responses for all forms or an individual form

KB: [Form Response Report](#), [Export Reports](#)

Form Name	Form Response Id	Form Response Date	Email	First Name	Last Name	Should this person be on the Nice List?	On a scale of 1 - 10 (1 is lowest 10 is highest) - how would you rate Dairy Queen?	How much would you pay to spend a day in an ice-cream factory?	What percentage of time do you spend eating ice-cream during the summer?	Pick your favorite ice-cream	What is your favorite cookie?	Please share your favorite cookie recipe	What day is Christmas this year?	What would you like in your Christmas Stocking (pick as many as you want)	Con
Training Survey Form	43379	9/5/2018 4:37 PM					2	\$100.00	100.00 %						
Training Survey Form	43407	9/6/2018 9:43 AM					0	\$0.00	0.00 %						
Training Survey Form	43409	9/6/2018 9:44 AM					0	\$0.00	0.00 %				9/26/2018		
Training Survey Form	43432	9/6/2018 12:06 PM					6	\$1.00	25.00 %	Cookie Dough			12/25/2018		
Training Survey Form	43436	9/6/2018 12:25 PM		Cheri	Petterson	Yes	5	\$99.00	25.00 %	Rocky Road		https://mmp4production.blob.core.windows.net/publicfiles/3050959a-df00-4c21-a418-67b8b5d924be/c6aa5738-e64e-4484-99eb-d711b07436f2	12/25/2018	Che Pett	

Questions?

Training and Support

Customer Service Hours:

Monday-Friday: 8am to 5pm (Central)

GZSupport@growthzone.com

800.825.9171, Option 4, then Option 2

Online Support Documentation:

[GrowthZone Knowledge Base »](#)

Training Calendar:

[View Training Event Calendar »](#)

Live Chat:

[GrowthZone Support Portal \(chat on far right\) »](#)