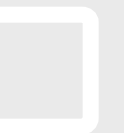


Before You Begin...

SURVEY FUNNEL

BUCKET SURVEYS



What's Ahead

**My goal is to provide information that will make it easier to create your Bucket Survey.
Armed with this information you will be able to:**

- Create your survey efficiently
- Make sure you don't miss any decision points
- Implement your survey faster and easier

The steps to prepare to create a survey:

1. Begin with the end in mind
2. Create a rough draft list of questions
3. Decide if you need logic for any of your questions
4. Consider how you intend to use the information you gather
5. Review your questions with two edits in mind
6. Create custom fields in your email service provider account
7. Create a new optin/signup form

1. Begin With The End In Mind

- What are the big ‘buckets’ that I want to segment my survey takers into?
 - Who are they?
 - Where are they in their business?
 - What are they trying to accomplish?

* If you are moving into a new market, we highly recommend that you start with a Deep Dive Survey before using a Bucket Survey.

Example: The Golf Market

Natural bucket groupings:

1) Man

2) Woman

...and

3) Slices the ball

4) Hooks the ball

2. Draft Your Questions

Don't overthink these

- Tip #1: Ask a very basic question, i.e., 'Are you a man or a woman'?
- Tip #2: Limit your survey to 3-7 questions (best practice)

3. Will You Use Logic?

Are any of your questions going to differ based on the responses already received?

- Tip #3: Create a mindmap of your questions and 'branching logic' to help you visualize the flow.

4. How Will You Use The Info?

Are you going to use their answer in a later question?

- For example, if your survey taker is a man, you might use that information in a question like this, “A lot of men that I work with...”

Are you going to use their answer in a follow-up email?

- For example, if your survey taker is a man, you might send an email that includes, “A lot of men that I work with...”

Brainstorm Your Survey Values

Think through the different values you want to save for each survey response.

If you're asking survey takers what their gender is, and you **ONLY** store the answer as "male" or "female" that will sound strange when the software uses that information later.

- a) A lot of males that I work with have a problem with...
- b) A lot of guys that I work with have a problem with...

Think through how you will use your survey responses in emails.

List All Your Value Variations

The goal is to come up with a list of all the variations of text you want saved in Survey Funnel when a question is answered.

When your survey taker answers a question, “I’m a man”, you want to save ALL of the following:

- 1) man
- 2) men
- 3) guy

Saving all the value variations enables Survey Funnel to send ALL the values to custom fields in your email service provider database so you can use the information later in a way that is more natural.

5. Go Back Through Your List

Review your list of questions and look for:

- Any questions you can eliminate
- Any questions where you can use the value from an earlier question to personalize the question (Example: a lot of guys/gals) who [slice/hook] the ball off the tee...)

6. Create Custom Fields

Create custom fields in your email service provider account for EACH of the values you want to save.

If you intend to save the “gender” answers as:

man, men, guy
woman, women, gal

Then you need 3 customs fields, which you might name:

- 1) gender
- 2) gender plural
- 3) gender informal

7. Create A New Optin/Signup Form

- In your email service provider account, create a new optin/signup form
- Copy the raw/unstyled HTML code and add this code to a text file, or make sure it's available as you will add this code to the Survey Funnel software.

In Summary

With a little preparation you can:

- Create your survey efficiently
- Ensure you have met your goals
- Implement your survey faster and easier

Survey preparation includes:

1. Beginning with the end in mind
2. Creating a rough draft list of questions
3. Deciding if you need logic for any of your questions
4. Considering how you intend to use the information you gather
5. Reviewing your questions with two edits in mind
6. Creating custom fields in your email service provider account
7. Creating a new optin/signup form

Congrats!

- You're ready to jump in and start building your survey using Survey Funnel
- You can follow-along with our 'Before You Begin your Bucket Survey' checklist which can be found in our knowledgebase.
- If you have any questions, do not hesitate to contact us at help@surveyfunnel.io.

The Survey Funnel Support Team
help@surveyfunnel.io