How to Use Surveys in Each Stage of the Marketing Flywheel

HubSpot | SurveyMonkey®

At one point or another, most marketers have been guilty of focusing too intently on acquisition, without thinking enough about follow through. Yet we know customers aren't simply a resource to be amassed: Part of our job is building a relationship with them by engaging them and delighting them at every turn. In return, they'll be your biggest advocates and the most significant accelerant for the growth of your business.

That's the idea behind **HubSpot's Flywheel** model of marketing, which abandons the traditional marketing funnel in favor of a concept that's more holistic, thoughtful, and, ultimately, valuable.

Customers are at the center of the Flywheel model, and it's your job to:

- Attract them with relevant content

- Foster that relationship with engaging experiences

- Delight them throughout their entire experience

How do you keep customers, delight them, and then encourage them to help you grow your business? Start by listening. Surveys can help you attract customers, find out exactly what they want, and even facilitate turning them into ambassadors for your brand.

In this guide, we'll teach you how to use surveys at every step of the marketing Flywheel:

ATTRACT

Build awareness and gather leads using surveys for content marketing

Concept test your way into winning ads, messaging, and names

ENGAGE

Create top-tier experiences informed by event surveys

DELIGHT

Capture customer sentiment using customer satisfaction surveys

Turn customers into advocates with social proof

Before you begin, know your survey question types:

Question Type	Example
Likert scale questions: Likert scale questions (or Likert-type questions if you want to get technical) ask you to rate something from one extreme to another—strongly disagree to strongly agree, for example. Likert scale questions are your best bet for getting strong, focused data on a single subject.	**How likely are you to open a corporate email?** ○ Very Likely ☑ Somewhat Likely ○ Neither Likely Nor Unlikely ○ Somewhat Unlikely ○ Very Unlikely
Standard multiple choice questions: In contrast to the Likert-type questions, which have predetermined answer scales, these questions allow you to make up your own answer options. Since they allow a bit more room for expression, these questions are great for providing extra color to your results. Make sure to add an "Other (please specify) to these types of questions to give respondents an option if they don't agree with any of the answer options you came up with.	**What type of advertising is most likely to catch your attention?** ○ Happy ○ Scary ○ Sad ○ Informational ○ Funny ○ Other (please specify) ○ Sweet
Open-ended questions: Open-ended responses or text box responses allow respondents to answer your question in their own words. This can be great to expose answers you hadn't thought of in your multiple choice questions or for adding a human touch to your data. However, open-ended questions are difficult to quantify and taxing for respondents, so we recommend using them sparingly.	**What is your favorite thing about using our product or service?** [text box]

Skip logic questions: If you want some respondents to only answer certain questions in your survey, skip logic can help. Let's say there's a portion of your survey where you only want responses from women: A skip logic question would skip anyone who didn't identify as women to a section of your survey where you want responses from everyone.

Do you identify as a woman?

◯ Yes   ◯ No

"No" respondents get skipped to a relevant section

Screening questions: Similar to skip-logic questions, screening questions are useful if you only want responses from a certain group of respondent to your survey. Using our previous example, adding a screening question at the beginning of your survey would disqualify anyone who didn't answer that they were women from your survey.

Do you identify as a woman?

◯ Yes   ◯ No

"No" respondents get dropped from the survey

Demographic questions: Gathering extra information about your respondents can help you spot interesting trends in your data when you analyze them. Consider what's important to the topic of your survey—whether it's job role, household income, shopping habits, etc.

What's your current role at your company?

◯ C-level executive   ◯ Management

◯ VP   ◯ Individual contributor

◯ Senior management

NPS® question: Useful for tracking overall success and benchmarking, the Net Promoter Score question asks: "How likely would you be to recommend [company name] to a friend or colleague?" The respondent is then asked to give a rating on a scale between 0 and 10, where people who answer 0-6 are considered "detractors", 7 and 8 are "passives", and 9 and 10 are "promoters."

On a scale of 1-10, how likely are you to recommend our product to a friend or colleague?

1	2	3	4	5	6	7	8	9	10

Attract

Build awareness and generate leads using surveys for content marketing.

SurveyMonkey recently ran a survey to analyze how people consume content and uncovered some **pretty alarming findings for content marketers**:

11% of people say they read company blogs.

Two-thirds of people say they're often disappointed by gated content.

80% of people trust what they read in traditional media more than content from brands.

Whether you're trying to get media attention, build traffic to your site, or gather valuable leads, using surveys to do original research for your content marketing efforts can help.

🔖 Overview

1. Create a survey about a topic that's interesting, unique, and most importantly, relevant to your brand.

2. Collect responses from the most relevant or useful audience you have at your disposal.

3. Pull out the best data points from your research and use them to tackle the marketing goal that's most useful to you.

Step 1: Come Up with a Great Survey Topic

The beauty of survey data is that you can use it for pretty much anything, but we've found that it's most useful for one of three marketing objectives:

- **Lead generation:** Gather valuable industry intelligence or take a look into the wants and needs of a group of people who are relevant to your target audience. The trick is getting data that's so valuable and relevant to them that they'll actually be willing to fill out a form to get it.

- **Brand awareness:** Interesting data can make headlines in a way that practically nothing else can for brands. The savviest content marketers use survey data to help boost PR efforts, get media mentions, establish credibility, and ultimately increase their brand awareness.

- **Site traffic:** Backlinks are the lifeblood of a good SEO strategy. People everywhere are hungry for good data to use in their articles, presentations, or school. Get them to backlink your site by answering their questions with survey data and delivering that information in an SEO-optimized page on your site.

How to Come Up with a Great Topic

No matter which objective you choose to use your survey results on, you need to make sure you choose a topic that meets all of the three following criteria:

- It's relevant: Make sure the content is intensely relevant to your target audience. If your target audience is marketers, survey a group of marketers about subjects that are deeply important to that group.

- It's relatable: People are inherently interested in things they can relate to. Think about the pain points and areas of interest of your target audience to come up with topics that will immediately catch their interest.

- It's readable: Your content needs to be enticing and interesting enough for people to want to download it, share it, and cite it. If it isn't something you would read, you need a better idea.
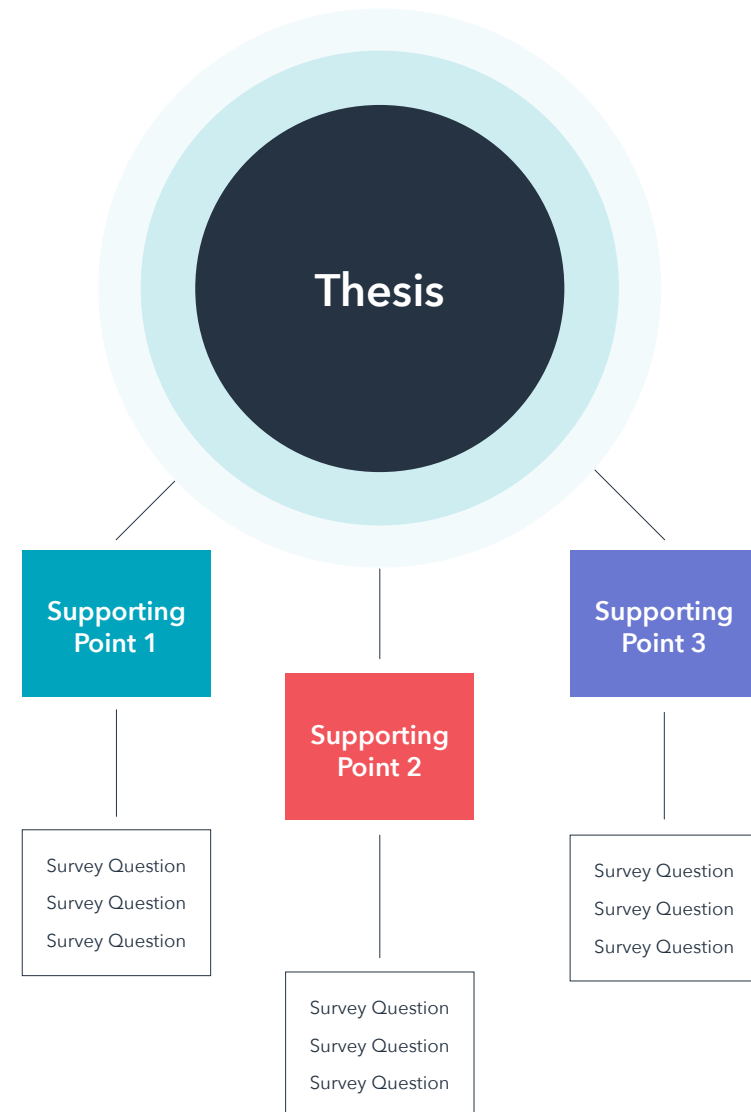
Step 2: Design a Snappy Survey

The key to writing a good content marketing survey is focus. It's important to go into your project with a point of view or thesis that you can prove or disprove with your research, otherwise you'll end up with vague, unfocused data.

Before you start writing your survey:

- Come up with a clear thesis that you want to explore with your survey.

- Come up with main points that would support that thesis.

- Write survey questions that address those main points.
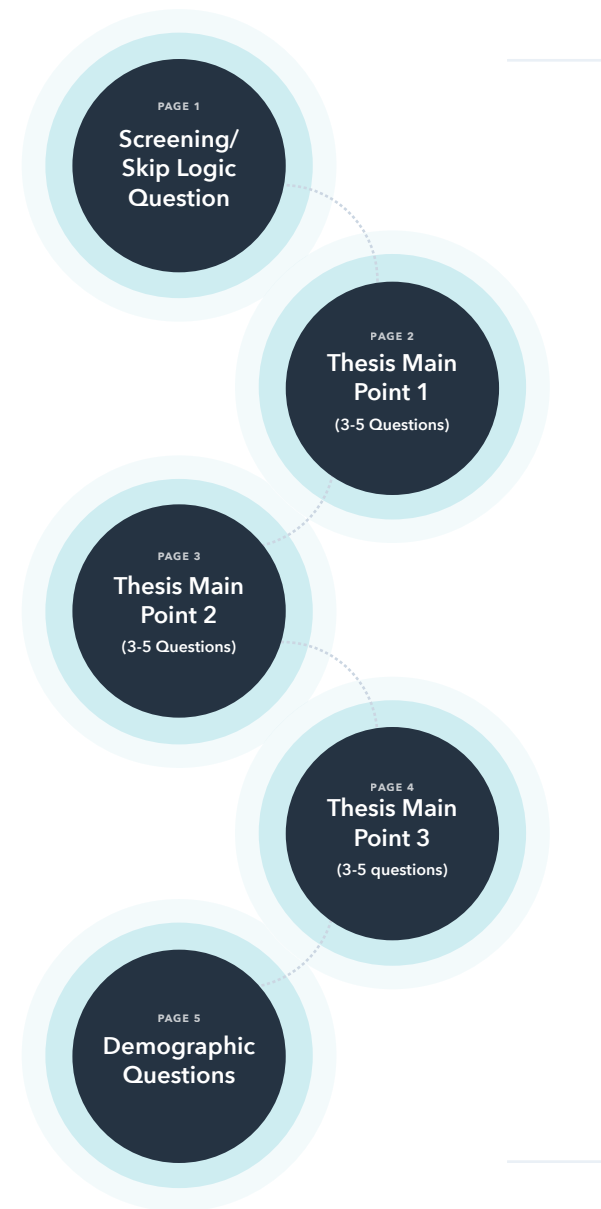
Pro Tip: Don't forget to do some preliminary research to see what information already exists on the topic. Then you can use your survey data to fill in the gaps or expand on ideas that are already out there.

Thesis

Supporting Point 1

Supporting Point 2

Supporting Point 3

Survey Question
Survey Question
Survey Question

Survey Question
Survey Question
Survey Question

Survey Question
Survey Question
Survey Question

How to Organize Your Survey

- Begin your survey with screening or skip-logic questions (if applicable) to get any disqualifications or skips out of the way before respondents begin your survey.

- Use Likert scale questions as the backbone of your survey. They're perfect for directly answering the main points of your thesis.

- Once you've answered the main points, use standard multiple choice questions to add color and context to those subjects.

- Don't use too many open-ended questions (maximum of two)

- Vary question type per page to keep readers' attention

- Create a multiple-page survey, with questions grouped by theme (see example below)

- Limit your survey to 25 questions total

- Add demographic questions at the end of the survey

Example Survey Flow

PAGE 1
Screening/ Skip Logic Question

PAGE 2
Thesis Main Point 1
(3-5 Questions)

PAGE 3
Thesis Main Point 2
(3-5 Questions)

PAGE 4
Thesis Main Point 3
(3-5 questions)

PAGE 5
Demographic Questions

Step 3:
Send Your Survey to the Best Audience for Your Topic

When it comes to sending your survey, you basically have three options for audiences:

- Poll people on social media: This a good option for fun, smaller engagement projects.

- Email your customer base: A great option for "industry insights" content. Email customers about issues that are relevant to them and their job.

- Use a global survey panel: The best option for serious studies. Survey panels like **SurveyMonkey Audience** let you survey respondents around the world about practically any topic you'd like to learn about.

	Pros	Cons
Poll People on Social Media	Ease. It's quick, easy, fast, and free. Engagement. Followers love to participate in research for content you share with them later.	Not scientific. Your Facebook followers aren't a scientific sample of diverse respondents. Low response rates. If you don't have many followers you might have a tough time getting enough responses.
Email Your Customer Base	Value. Customers provide the best data for "industry insights" content. Relevancy. Data based on your customers' jobs will be innately interesting to them.	Not scientific. Your customer base isn't a representative sample of a population. Annoyance. Your customers are your most important asset, so it's best not to bug them with too many surveys.
Use a Global Survey Panel	Scientific. Get valid results by collecting large, balanced survey samples. Targeting. Good survey panels well let you focus on one type of respondent.	Budget. Buying responses from a survey panel isn't expensive, but it isn't free like other options. Targeting. Homing in on very specific audiences can be expensive or even impossible.

Step 4: Analyze it to Find the Most Eye-Catching Information

Chances are, your most interesting findings aren't going to be in the topline results. Using survey data analysis tools like filters and crosstabs can help you look under the surface of your data or see the differences in how different groups of respondent answered.

It's best to play around with the data yourself to see what jumps out as interesting, but here are some places you can get started using data analysis tools:
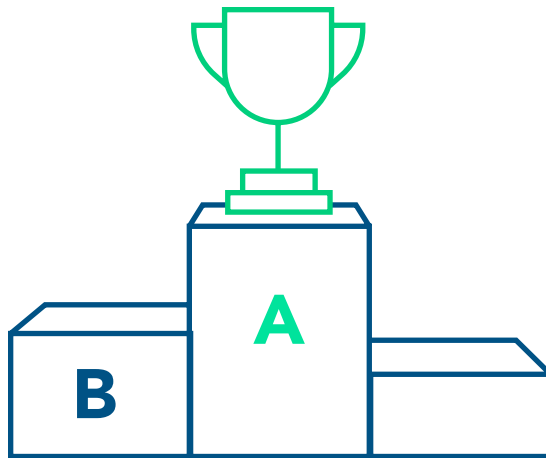
- Filter by demographic: Put those extra questions at the end of your survey to good use. See how different groups of respondents answered your survey.

- Filter by your Likert scale questions: You can choose to see only answers from respondents who strongly agreed or agreed (or strongly agreed or disagreed) to see how those respondents answered other questions on your survey.

- Sort through your open-ended responses: Tools like sentiment analysis or word clouds can help you get a broad sense of how people responded, but ultimately it's a good idea to go through each response to find persuasive and interesting quotes.

Once you've got a critical mass of survey data to create content out of, the sky's the limit. Whether you're using it to gather valuable sales leads, or grow your site traffic or brand footprint, you're now armed with valuable, interesting data to get it done.

Concept Test Your Way into Winning Ads, Messaging, and Names

Uncertainty can be a marketer's worst enemy. Is that ad going to perform? Will that messaging resonate? Does that name or logo make any sense to buyers? These are the types of questions that keep marketers everywhere up at night.

Luckily it's pretty easy to do concept testing on these things before you have to make a decision. Any marketer with a little bit of know-how can take the concepts they're trying to choose between, add them to a survey, and put them in front of their target audience to see which will be a winner.

🔖 Overview

1. Format and arrange your stimuli (the concepts you want to test) in your survey.

2. Choose the correct metrics to use to accurately compare your stimuli.

3. Analyze and act on your results!

Step 1: Develop a Specific Goal

You should always start your concept testing surveys by crafting a good goal. If your goal is "test some ads to see which wins," you're not going to end up with data you can use. You need to get specific and include the three key components of a good goal:

Audience	Type of Feedback	Number of Responses
Make sure your survey is targeting potential consumers of the products you're testing or potential prospects that the ads you're planning.	Is it more important to find out if that packaging concept is memorable or if it stands out on the shelves? Do you want to know if your ad would motivate respondents to buy your product or if it makes them remember your brand? You should figure out your priorities before you start writing your survey.	Some types of concept tests are more rigorous than others. You might want to just do a quick gut check of a few concepts or you might be conducting a detailed analysis that will have huge implications on how you go to market. You're going to want to scale the number of responses you collect accordingly.

Step 2: Turn your stimuli and metrics into a survey

Crafting Survey Questions

Concept testing surveys are made up of two main components: stimuli and metrics.

> **Stimuli** are the concepts you're testing. They can be ads, videos, messages, packaging, logos, name, and more.

> **Metrics** are the criteria by which respondents will judge your stimuli, and they're the building blocks that will make up the questions in your survey. As mentioned in the last section, not all metrics will apply to every test you run—you've got to determine which to use based on your goal. The next page has a handy guide of which metrics apply to each of the major types of concept test.

Once you've chosen which metrics apply to your goal, you can transform them into survey questions by plugging them into a Likert scale question:

How _____ is the stimulus?

○	✓	○	○	○
Extremely	Very	Somewhat	Not so	Not at all

With the uniqueness metric applied, becomes:

How unique is the stimulus?

○	✓	○	○	○
Extremely Unique	Very Unique	Somewhat Unique	Not so Unique	Not at all Unique

Metric	Product	Ad	Logo	Name	Package	Claims
Appeal	✓	✓	✓	✓	✓	✓
Believability	✓	✓	✓	✓		✓
Ease of finding			✓		✓	
Innovativeness	✓					
Purchase intent	✓	✓	✓	✓	✓	✓
Pronounceability				✓		
Quality	✓				✓	
Relevance	✓	✓	✓	✓	✓	✓
Uniqueness	✓	✓	✓	✓	✓	✓
Value	✓					

Building Your Survey

At this point, it's simply a matter of adding your stimuli and questions to a survey along with screening questions (if applicable), category questions (which can help you gain more info on your respondents before you expose them to stimuli), a final question that forces respondents to choose their favorite stimuli (in case there's a tie), and demographic questions.

It will end up looking something like this (the green arrow indicates that there will be multiple pages of stimuli and questions):

Important Note: For the sake of your respondents' patience, it's best to ensure that your entire survey is less than 25 questions. That means that the more stimuli you test, the more quickly you'll reach that number (since you'll have to ask the same questions about every stimulus).

▦ Take a Shortcut, Use a Template

If you don't want to build a survey from scratch, we've got pro survey templates written by experts that you can use to run concept tests for all the most popular use cases.

Name Testing Template

Logo Testing Template

Ad Testing Template

Product Testing Template

Package Testing Template

Messaging Template

Step 3: Send Your Survey to Your Target Audience

When it comes to sending your survey, you have three general options for audiences:

- Use convenience sampling: Friends, families, social followers, coworkers—a good option for informal, less important concept tests.

- Sample your customer base: A great option for collecting feedback on something they're already familiar with (your product!).

- Use a global survey panel: The best option for serious concept tests. Survey panels like **SurveyMonkey Audience** let you survey respondents around the world and target specific groups of respondents.

	Pros	Cons
Convenience Sampling	Ease. It's quick, easy, fast, and free. Great for gut checking a concept or getting a quick poll on which is the most popular.	Not scientific. Your friends and coworkers aren't a representative sample of your consumers. Low response rates. It may be tough getting more than a couple dozen responses to your survey.
Customer Base Sample	Relevance. Your customers have informed opinions about your products. Ease. As long as you don't overdo it, you can easily survey them, for free.	Not scientific. Your customer base isn't a representative sample of a population. Annoyance. Your customers are your most important asset, so it's best not to bug them with too many surveys.
Global survey Panel	Scientific. Get valid results by collecting large, balanced survey samples Targeting. Good survey panels well let you focus on one type of respondent.	Budget. Buying responses from a survey panel isn't expensive, but it isn't free like other options Targeting. Homing in on very specific audiences can be expensive or even impossible.

Step 4: Turn Your Results into Action

Once you've sent your survey and gotten back your results, you can start turning your raw survey data into something presentable and actionable. The first step is converting your results into Top 2 Box Scores.

Making Top 2 Box Scores

If you used standard Likert scale questions, you probably have several columns of data with "strongly agree, agree, neither agree nor disagree, etc."

But the information you're really interested in is how many people overall agreed that your ad was appealing, believable, unique—or whatever metric you're interested in. Create your Top 2 Box score by simply combine the top two scores—like "strongly agree and agree"—to create a combined score that accounts for everyone who answered that question positively.

Make a scorecard using your Top 2 Box Scores

If you're planning to present this to get buy-in from your partners, it's best to do it in a way that makes things crystal clear. That's why market researchers load their Top 2 Box Scores into an easy-to-understand scorecard like this one:

Stimuli Reference ID	A	B
	n = 400	n = 400
Appeal	52%	76%
Statistical Significance	–	A
Believability	35%	61%
Statistical Significance	–	A
Uniqueness	18%	22%
Statistical Significance	–	–
Purchase Intent	20%	36%
Statistical Significance	–	A

From here, it's obvious to anyone which packaging design came out ahead, and why.

Pro Tip: Sometimes the results on your scorecard will be too close to call. This is where a final forced-answer question (which forces respondents to choose their favorite concept) comes in handy. Use it as a final tie-breaker if you're in a pinch.

Congratulations! You've built your concept test from the ground up and gotten meaningful results from your surveys. Now you can use your results to convince stakeholders to move forward with the concept that won.

Move the Needle with Actionable Insights from Feedback

From instant customer feedback to DIY market research, SurveyMonkey's suite of marketing solutions make it easy to get the insights you need to drive growth, build trust, and make data-driven decisions.
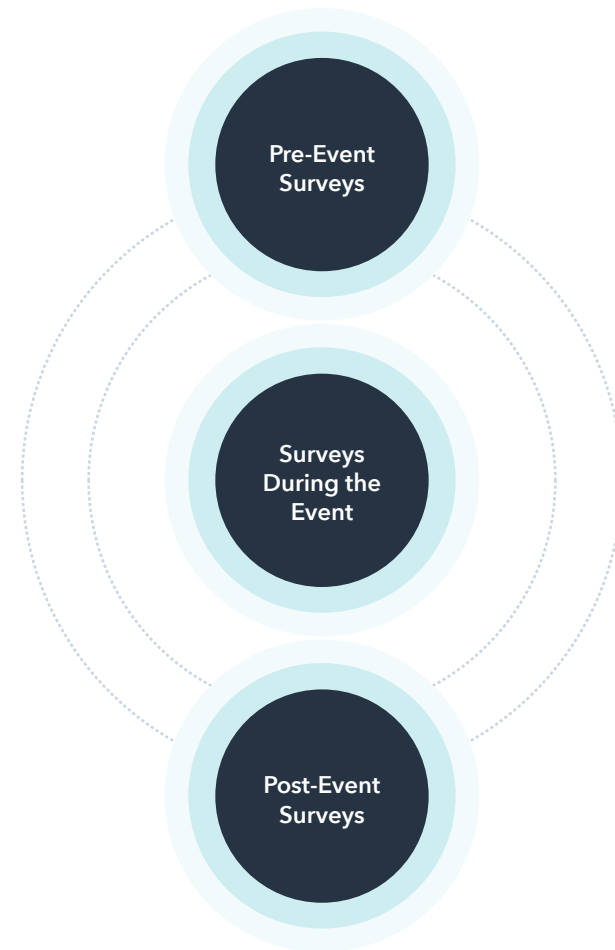
Learn More

Engage

Create Top-Tier Experiences Informed by Event Surveys

What do your attendees really want to learn about? Did you choose the right vendors? What's the best way to time your event so that the most people can attend? Events are a powerful way to keep employees engaged, but they're also expensive and hard to pull off. Creating a feedback loop before, during, and after event enables you to create rich, rewarding events for both attendees and your company.

🔖 Overview

1. Pre-event surveys: Create a tailored event feel

2. Surveys during the event: Engage and gather leads

3. Post-event surveys: Get feedback to improve future events

Pre-Event Surveys

Surveys During the Event

Post-Event Surveys

Step 1: Prepare like a Pro with Pre-Event Surveys

Pre-event surveys let you tailor your event to better support employees' wants and needs. Your pre-event surveys serve 2 key purposes: planning for logistics and customizing your event for your attendees.

Logistics: Pre-event surveys help you answer questions like, "when are attendees planning to arrive?", "do any have dietary restrictions?", and "which sessions will need the most sitting room?" A few quick and to-the-point multiple choice questions get you everything you need for easier planning.

Customization: You can also use pre-event surveys to inform the content of your event. You can seek out a speaker or topic that's interesting to your attendees, decide between a few options, or simply arm speakers with a list of questions from attendees. Even if programming is set, there's often some wiggle room for a personalized experience. If the topic is using AI in marketing, are people more interested in email or in mobile? What are they curious about?

Cheat Sheet: How to Make the Most of Your Pre-Event Surveys

- Just because you're achieving 2 goals doesn't mean that you need 2 surveys. Include both logistical and directional questions in your survey to maximize your insights.

- Use multiple choice questions where possible to reduce work, but include an "other" option where people can write in things you haven't thought of.

- Pre-event surveys tend to have higher response rates than other event surveys, so you can also use them to ask a question or two of market research–like questions about consumer preferences that you want to know about or questions related to why people choose to come to events like yours. Just remember to keep the overall survey short and straightforward.

Step 2: Survey in Real-Time During the Event

You can use surveys during your event to generate leads, engage prospects, and get authentic feedback. You can also use this time to do measure general sentiment about a topic or idea or beta test a product or feature.

There are a few different ways to do mid-event survey research:

- Have team members carrying tablets who ask attendees to take a quick survey face-to-face

- Build **QR codes** that link to the survey. These can be embedded into presentation decks, handouts, or posters and marketing materials

- Set up kiosks at a booth or around the event

You can incentivize people to take your survey by giving away swag or holding a raffle for everyone who takes it. If you're doing a research report, you can also offer early access to the findings. Adding incentives is a fun way to engage get prospects or customers excited and involved, while still getting the feedback you need.

Pro Tip: Unless it's your own event and you're confident in your network, do not count on being able to access Wi-Fi at the event. Big conferences and trade shows often struggle to support the internet demand of attendees. Tools like **SurveyMonkey Anywhere** allow you to capture answers offline and upload the captured data to the cloud.

Step 3: Improve Your Next Event with Post-Event Surveys

If event planning is a regular part of your responsibilities, the post-event survey is your best way to measure success and see what you might change the next time around.

SurveyMonkey's free **post-event template** covers all the basic standard questions, which you can customize for your organization. There are some general areas you should cover regardless of what you use.

What to ask about:

- ✓ Overall experience (Net Promoter Score)
- ✓ Impressions of specific sessions/talks
- ✓ The timing and location of the event
- ✓ The logistics and scheduling—whether there were too many breaks or too few, whether the ordering of sessions made sense, the structure was clear, etc.
- ✓ Wishlists for next time

Again, make sure to ask questions about the respondent's role, company, etc., if you're going to want to filter by those later.

Want to home in on responses from one specific type of respondent? You can use **skip logic** to surface the relevant questions to only the relevant people.

Question: Did you attend our leadership brunch on Sunday?	
If yes, follow up with related questions: *Which speaker did you enjoy most?* *Did you enjoy the breakfast selection?*	If no, simply skip respondents to the next relevant question.

Sending post-event surveys:

Timing is more important for event surveys than most other types of surveys, because every day you wait to send the survey you lose some of the attendee's memory for details and enthusiasm for response.

Aim to send the survey no more than 1-2 business days after the event.

It's best to send post-event surveys via email, so you can also schedule it in advance.

Analyzing post-event surveys:

There are a few ways you might want to use your post-event data:

1. Filter by people strongly liked or disliked the event to dig in on why and find trends

2. Filter by job/role for leads or general insights

3. Benchmark success against previous iterations of the event or against similar events

Unlike other forms of marketing, events are fully immersive experiences you can use to delight prospects and customers. Surveys give you the context you need to make sure they're successful.
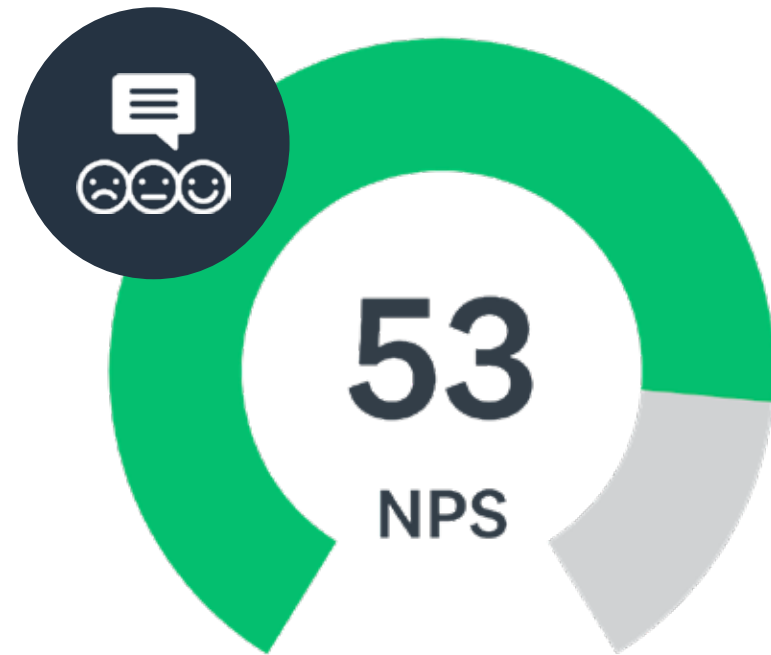
Delight

Capture Customer Sentiment Using Customer Satisfaction Surveys

The central premise of the marketing Flywheel—that marketing doesn't end with customer acquisition—is directly supported by customer satisfaction surveys.

[According to McKinsey](#), organizations that get feedback throughout the entire customer lifecycle see a 20% increase in customer satisfaction and up to a 15% increase in revenue. In other words, the best way to ensure you delight your customers is to ask them what they think.

But any time you're asking customers for a favor you need to be extremely considerate of their time. A well-orchestrated customer feedback program gives them a chance to voice their opinions without asking them to put in too much work.

You can quantifiably track your progress and make critical strategic marketing decisions with a simple [customer satisfaction survey](#) and a clear system for sending it out.

53 NPS

🔖 Overview

1. Learn about the different kinds of NPS surveys

2. Create an efficient, effective survey

3. Isolate the insights you care about most

Step 1: Understanding the Ultimate Customer Satisfaction Metrics

What is NPS? The score comes from the Net Promoter Score question: "How likely would you be to recommend [company name] to a friend or colleague?" The respondent is then asked to give a rating on a scale between 0 and 10, where people who answer 0-6 are considered "detractors", 7 and 8 are "passives", and 9 and 10 are "promoters."

How is it calculated? The formula is: NPS = % of Promoters – % of Detractors. SurveyMonkey also has a **free calculator** you can use.

What's the difference between transactional and relational NPS surveys?

	Transactional	Relational
Survey timing and cadence	Each survey is triggered by an action (like making a purchase, using a feature, or getting help from customer support), and asks about that specific experience. It's a one-time survey.	The survey goes out to a sample of customers at a regular cadence.
Type of insights	Often focuses on the action that triggered the survey: a transaction, customer service interaction, etc.	More general. How does the customer feel overall? What do they love? Do they have any general feedback?
Are follow-up actions required?	May be highly actionable. Customers may expect a quick response if they report a problem or ask a question.	Not typically as urgent to respond to. More useful for generally benchmarking success metrics and getting high-level feedback.
Primary users and use cases	Often used by support teams, companies with many customer interactions or transactions.	More common with strategic teams to inform high-level planning and decisions.

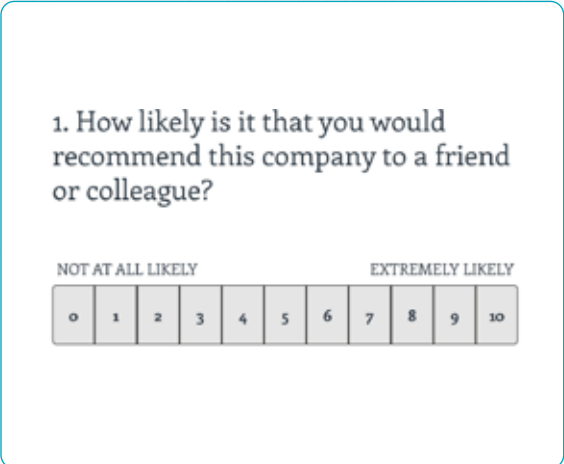# Step 2: Building and Sending a Successful Customer Satisfaction Survey

Tips for Designing Customer Satisfaction Surveys

✓ Put your NPS question first. Whether you're running a relational or transactional survey, NPS is the most important statistic you need. If you're using SurveyMonkey, adding a page break after the NPS question means that you'll collect data for that answer—even if the person doesn't finish the rest of the survey.

This also eliminates bias. Sometimes the structure (or length) of your survey can change the way people view your offering. Asking at the beginning of the survey gives you their authentic gut response to your product—not the survey.

✓ Minimize the amount of work you ask respondents to do. Keep customer satisfaction surveys under 10 questions and limit the amount of "open-ended" or comment box questions to 1-2. The less writing you ask for, the better (and the more thorough your responses will be.)

✓ Ask demographics questions. Don't be afraid to ask about role, title, age etc. Research shows that respondents expect to be asked about demographics. Asking questions enables you to identify trends among different subgroups.

If there's a group you're especially interested in (e.g. parents), add a question about that too.

🔲 Choosing a Sample Size

To get a good read on your customer sentiment, you need means **statistically significant** results. SurveyMonkey's **sample size calculator** can help.

25,000 customers vs 1,000 customers

379   minimum sample size   278

How to Time and Send Customer Satisfaction Surveys

Relational NPS Survey	Ideally survey monthly, but every 3-6 months can also be sufficient
Transactional NPS Survey	Can either be triggered immediately after an interaction or after a predetermined amount of time (e.g. 30 days after purchase)

Expert Templates

Here are some of SurveyMonkey's popular, expert-built customer satisfaction templates:

- **Customer satisfaction survey template** (either relational or transactional)

- **NPS survey template** (either relational or transactional)

- **Customer service survey template** (transactional)

Ways to Send

- Embedded in an email: the most common way to send

- Through a robust NPS solution like **SurveyMonkey CX**

- In a web link sent via text, chat, etc.

- In a QR code (generated from the web link) included on product packaging

Step 3: Using your Results

Analyzing the Data

Topline NPS (the overall average NPS score) is a good quick indicator of how you're doing and a helpful way to track trends over time, but you can get more detailed insights by slicing and dicing your data in different ways.

If you're using SurveyMonkey, you can use filters and/or Compare Rules to zero in on a specific subgroups of respondents. (Filters help you isolate one subgroup, compare rules let you compare and contrast two different groups.)

Ways you can slice up your data:

- By detractor, passive, or promoter

- By how they responded to a certain question

- By demographic

When your data is all in, you can embed your findings into presentations, make infographics, or share data readouts with the relevant stakeholders—whatever it takes to ensure you're delighting customers at every stage.

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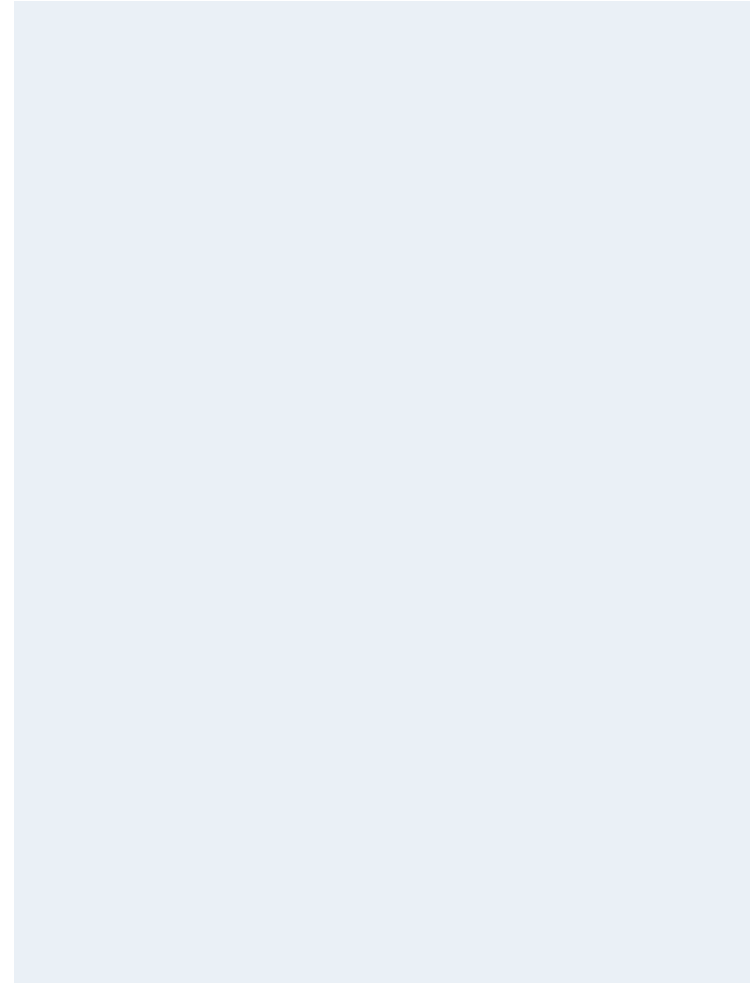
From Delight to Attract

Turn Customers into Advocates with Social Proof

Publishing content that tells your customers' stories is one of the most powerful ways to build credibility, showcase the power of your offering, and catch the attention of your target audience. But customer stories (or "social proof") are hard to capture. Surveys can help.

🔖 Overview

1. Why marketers need to capture the voice of their customers at scale

2. Building a survey that supports marketing

3. Using voice of customer surveys in marketing content

Step 1: Understand How and Why to Get Customers on the Record

Why get customers on the record?

Win trust: The words of your customers are powerful—more powerful in fact than most other messages you come up with about your product.

- **SurveyMonkey research** found 82% of people trust the voice of your customers over brand or product copy.

- **Nielsen research** found 92% of buyers trust peers over advertisers.

Show diversity: It's not enough to create a case study or two and call it a day. Your buyers are looking for relevant stories that provide proof that your products/services work for their unique industry, role, company size, or even region. But it can be a huge challenge to create customer stories for all of the diverse verticals, personas, roles, and so on that make up your target market—particularly if you're waiting for customers to proactively raise their hands to participate. Asking for feedback at scale is much more effective. More customer voices enable you to tell more stories that resonate with more buyers.

⊕ How to Get More Customers on the Record

☑ Send a short survey to your entire customer base. To get customer stories at scale, you need to reach out to customers at scale—and that's where surveys come in. Surveys are a smaller time commitment than traditional case study interviews, so more of your happy customers will be able to participate. Send your survey via email and promote it on social through a web link.

☑ Accept—and validate—anonymous customer stories. Some people or companies won't be willing or able to endorse your company under their own name. That doesn't mean you need to lose their story! If customers are willing to be quoted anonymously, you can use a third-party service to assign a category to the customer feedback (e.g. Fortune 100 healthcare company, celebrity chef, etc.) and give it a stamp of approval.

Step 2: Build a Survey to Capture the Voice of the Customer

There are a few key rules of thumb that can help you get more powerful proof points from your surveys.

- Reverse engineer your responses. Are you eager to showcase a new feature? Do you feel like your company has a key differentiator that you'd like to get across? Ask questions about those specific things that pertain to specific benefits or differentiating aspects of your product, so that the response data will reflect positively on your product when published.

- Optimize for striking stats. Qualitative customer stories are great, but it's also important to gather quantitative statistics that show how your average customer uses and benefits from your products. For instance, it's super impactful to be able to say, "x percent of people like our feature" or "would describe us in x way." Include "select all that apply" questions to get the numbers you want. You can also get punchy numbers from multiple choice and yes or no questions.

- ...But create space for customers to speak in their own words. To get at those authentic customer quotes about your product, include 1 or 2 testimonial questions (comment boxes) where customers can write in whatever they like.

- Stick to what's familiar. Restaurant patrons are used to using a 5 star ranking system, and NPS® is a universal benchmark for products and services. Use these kinds of familiar metrics to minimize confusion and get consistent results.

- Keep it short. As always, aim to keep surveys around 10 questions with no more than 1-2 matrix style questions to ensure a high completion rate. Put your comment boxes for written customer testimonials at the end.

- Include demographics questions. To create targeted customer content, you'll want to sort your data by filters like role, industry, or use case (e.g. marketing professionals). Make sure to include the appropriate demographic questions to get that information. You'll be able to filter by those responses later, which can be helpful in vertical or account-based marketing.

Sending your Customer Testimonial Survey

- Send to a broad sample of your customers or to your entire customer base via email or web link at regular intervals

- Use NPS® surveys to measure customer satisfaction, then send an advocacy survey to only "promoters"

- Use TechValidate for a faster and 3rd-party validated way to gather and transform customer feedback into case studies, testimonials, and reviews.

Analyzing

Besides powerful quotes, you're also going to want to uncover those compelling statistics you were angling for. Using filters based on your demographics questions can help you isolate talking points for readers in those areas.
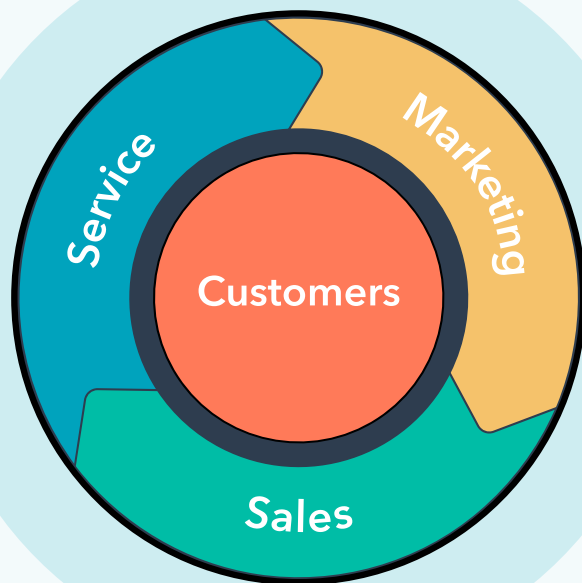
In SurveyMonkey, you do this by going to Analyze Responses–> Filter –>Question and Answer.

Step 3: Publishing your Customer Testimonials

Once you have the data in, there are a variety of ways you can leverage it in your marketing. Here are a few common ones:

Goal	Type of content
Demand Generation	Advertisements, landing pages, nurture emails, gated eGuides and reports
Sales Enablement	Case studies, fact sheets, battle cards
Competitive Differentiation	Advertising, website content, fact sheets, battle cards
Thought Leadership	Blog posts that draw on statistics and quotes, customer stories, infographics
Vertical & Persona Targeted Messaging	Specialized email campaigns, targeted case studies, fact sheets, infographics
Social Media	Statistics, quotes, charts

According to Bizrates, 98% of people read online reviews before making a purchase decision. The voice of customers has never been more influential. Use surveys to capture and amplify the customer stories you care about, and reap the benefits as your audience responds.

Conclusion

Now that you know how to use surveys at every stage of the marketing Flywheel, you can start using feedback to complete your particular marketing goals, whether they're in boosting acquisition, improving engagement, or finding new ways to delight your customers.

The feedback you collect at each step of the customer journey directly fuels your ability to relate to them better. A data-fueled marketing Flywheel will help you not only win new customers, but also keep them—delivering the messages and experiences they're hungriest for. So stop guessing what customers want and start asking. There's a wealth of knowledge at every stage.

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