

VoC Feedback

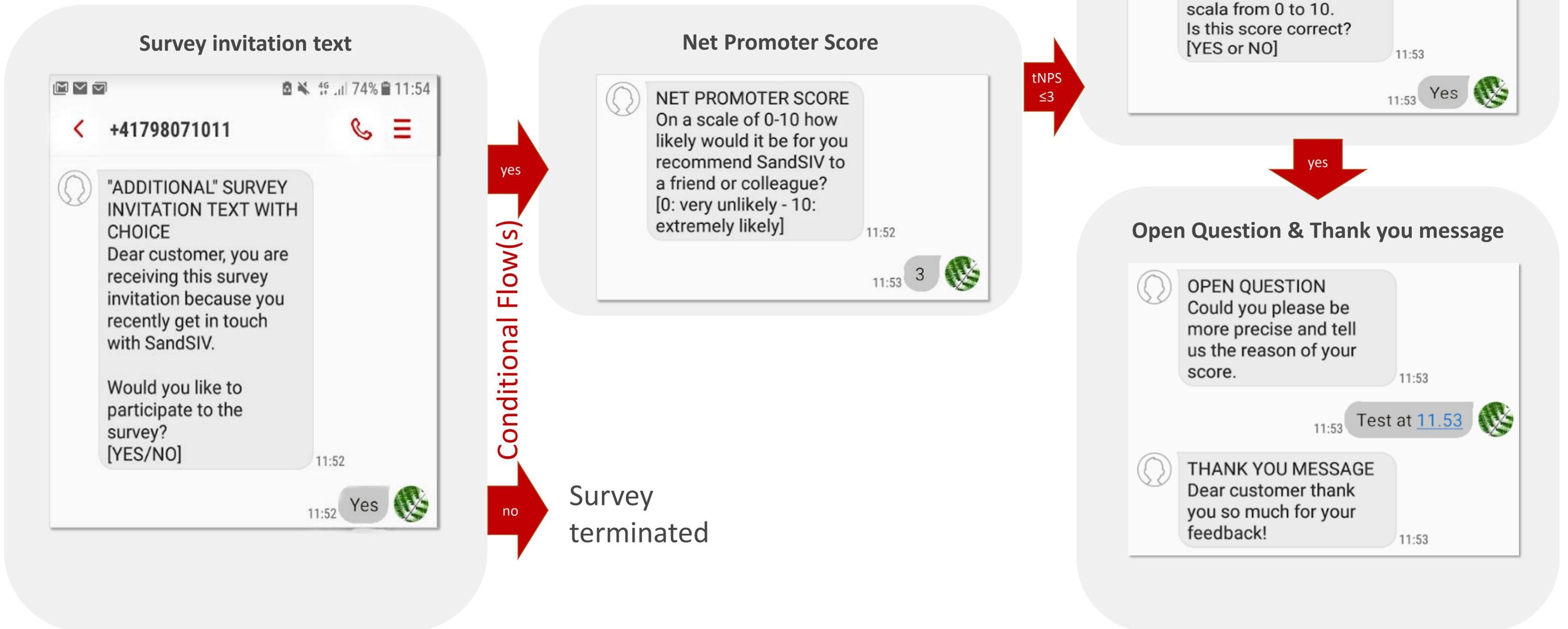
SMS Survey Creation

Sandsiv, October 2020

sandsiv+

SMS Survey introduction

What we are going to create...



SMS Survey introduction

Question's type overview & conditional flow

Survey_ID information needed for the creation of the IMPORT file

Questions | Survey Settings | Common Settings | Language Settings | Statistics | Quarantines | Customers

Customer Training-SMS | Active | WEB | **SMS (ID:298)** | IVR | DIGI | EN | Send invite

Questions | Reorder | Graph | Add question

Survey invitation text "ADDITIONAL" SURVEY INVITATION TEXT WITH CHOICE Dear customer, you are rec...	YES/NO	Settings	+	Trash	More
SMS-Training-NPS NET PROMOTER SCORE On a scale of 0-10 how likely would it be for you recommend ...	SCALABLE	Settings	+	Trash	More
NPS Value Confirmation NPS CONFIRMATION QUESTION Dear customer you scored us with {{question6203_a...	YES/NO	Settings	+	Trash	More
SMS-Training-Open OPEN QUESTION Could you please be more precise and tell us the reason of your score.	OPEN	Settings	+	Trash	More
SMS-Training-Finish THANK YOU MESSAGE Dear customer thank you so much for your feedback!	FINISH SURVEY	Settings	+	Trash	More

Conditional Flow(s) Settings

Survey Settings - SMS channel

Please go on:

<https://support.sandsiv.com/hc/en-us>

List the possible question's type

1.
2.
3.
4.
5.

SMS Survey creation

Create your survey and insert the first question

1. Go to “VOC Feedback” and choose “Surveys”
2. Select “Add Survey”
3. Give an appropriate name
4. Select the “Unit name” if required
5. Push on “Add survey”

Add survey

Name * Demo SMS Survey

Unit * Demo

New survey will be added to unassigned Touchpoint (by default).

Cancel Add survey

6. Select now your new created survey

Group ID	Title	Channels / Status	Response Rate
23	Demo SMS Survey	WEB SMS IVR DIGI	yesterday 0% last 30 days 0%

7. Select the SMS channel
8. Change survey language if needed
9. Check “Change status” and set according your needs
10. Select “+ Add question”

Questions Survey Settings Common Settings Language Settings Statistics Quarantines Customers

Demo SMS Survey Paused SMS (ID:472) IVR DIGI EN Send invite

Questions Reorder Graph + Add question

No questions yet

11. Title your question and choose it's type.

General

Title * Survey invitation text

Type * Yes/No

External id Survey invitation text-Ext.id

12. Complete the survey different question settings as required

Questions Survey Settings Common Settings Language Settings Statistics Quarantines Customers

Demo SMS Survey Channel: SMS EN Send invite

General

Title * Survey invitation text

Type * Yes/No

External id Survey invitation text-Ext.id

Question text

Text "ADDITIONAL" SURVEY INVITATION TEXT WITH CHOICE
Dear customer, you are receiving this survey invitation because you recently get in touch with SandSIV.
Would you like to participate in the survey?
[YES/NO]

Error text Please write only YES or NO
Thank you.

Cancel Apply Save

13. Add questions according your business needs by following the next slides

SMS Survey creation

Survey invitation text with yes/no condition flow

Questions

Reorder Graph Add question

- Survey invitation text**
"ADDITIONAL" SURVEY INVITATION TEXT WITH CHOICE Dear customer, you are rec... YES/NO
- SMS-Training-NPS**
NET PROMOTER SCORE On a scale of 0-10 how likely would it be for you recommend ... SCALABLE
- NPS Value Confirmation**
NPS CONFIRMATION QUESTION Dear customer you scored us with {{question6203_a... YES/NO
- SMS-Training-Open**
OPEN QUESTION Could you please be more precise and tell us the reason of your score. OPEN
- SMS-Training-Finish**
THANK YOU MESSAGE Dear customer thank you so much for your feedback! FINISH SURVEY

Questions Survey Settings Common Settings Language Settings Statistics Quarantines Customers

Customer Training-SMS Survey (Volkan) Question ID: 6202 Channel: SMS EN Send invite

General

Title * Survey invitation text

Type * Yes/No

External id Survey invitation text-Ext.Id

Question text

Text
"ADDITIONAL" SURVEY INVITATION TEXT WITH CHOICE
Dear customer, you are receiving this survey invitation because you recently get in touch with SandSIV.

Would you like to participate to the survey?
[YES/NO]

Error text
Please write only YES or NO.
Thank you.

Cancel Apply Save

Question Flow

Action type
Go to

SMS-Training-NPS

Join conditions with
And

+ Add condition

Question	Condition	Value
Survey invitation text	equal	YES

GOTO SMS-Training-NPS IF Survey invitation text equal YES

Cancel Save

Question Flow

Action type
Terminate survey

Join conditions with
Or

+ Add condition

Question	Condition	Value
Survey invitation text	equal	NO

TERMINATE IF Survey invitation text equal NO

Cancel Save

SMS Survey creation

Net Promoter Score

Questions

Reorder Graph Add question

- Survey invitation text
"ADDITIONAL" SURVEY INVITATION TEXT WITH CHOICE Dear customer, you are rec... YES/NO
- SMS-Training-NPS**
NET PROMOTER SCORE On a scale of 0-10 how likely would it be for you recommend ... SCALABLE
- NPS Value Confirmation
NPS CONFIRMATION QUESTION Dear customer you scored us with {{question6203_a... YES/NO
- SMS-Training-Open
OPEN QUESTION Could you please be more precise and tell us the reason of your score. OPEN
- SMS-Training-Finish
THANK YOU MESSAGE Dear customer thank you so much for your feedback! FINISH SURVEY

Questions Survey Settings Common Settings Language Settings Statistics Quarantines Customers

Customer Training-SMS Survey (Volkan) Question ID: 6203 Channel: SMS EN Send invite

General

Title * SMS-Training-NPS

Type * Scalable

External id SMS-Training-NPS-Ext.Id

Question text

Text

NET PROMOTER SCORE
On a scale of 0-10 how likely would it be for you recommend SandSIV to a friend or colleague?
[0: very unlikely - 10: extremely likely]

EN

Error text

Please enter a value between 0-10.
Thank you.

EN

Configurable values

Lowest value * 0

Highest value * 10

Number of values * 11

Cancel Apply Save

Question Flow

Action type

Go to

NPS Value Confirmation

Join conditions with

Or

+ Add condition

Question Condition Value

SMS-Training-NPS <= 3

GOTO NPS Value Confirmation IF SMS-Training-NPS <= 3

Cancel Save

Question Flow

Action type

Go to

SMS-Training-Open

Join conditions with

Or

+ Add condition

Question Condition Value

SMS-Training-NPS >= 4

GOTO SMS-Training-Open IF SMS-Training-NPS >= 4

Cancel Save

SMS Survey creation

NPS Value confirmation question (if NPS ≤ 3 only)

Questions Reorder Graph Add question

- Survey invitation text
"ADDITIONAL" SURVEY INVITATION TEXT WITH CHOICE Dear customer, you are rec... YES/NO
- SMS-Training-NPS
NET PROMOTER SCORE On a scale of 0-10 how likely would it be for you recommend ... SCALABLE
- NPS Value Confirmation**
NPS CONFIRMATION QUESTION Dear customer you scored us with {{question6203_a... YES/NO
- SMS-Training-Open
OPEN QUESTION Could you please be more precise and tell us the reason of your score. OPEN
- SMS-Training-Finish
THANK YOU MESSAGE Dear customer thank you so much for your feedback! FINISH SURVEY

Questions Survey Settings Common Settings Language Settings Statistics Quarantines Customers

Customer Training-SMS Survey (Volkan) Question ID: 6208 Channel: SMS EN Send invite

General

Title * NPS Value Confirmation

Type * Yes/No

External id NPS Value Confirmation-Ext.Id

Question text

Text

NPS CONFIRMATION QUESTION
Dear customer you scored us with {{question6203_answer}} on a scala from 0 to 10.
Is this score correct?
[YES or NO] EN

Error text

Please answer YES or NO. EN

Cancel Apply Save

Question Flow

Action type

Go to SMS-Training-Open

Join conditions with

Or + Add condition

Question Condition Value

NPS Value Confirmation equal YES X

GOTO SMS-Training-Open IF NPS Value Confirmation equal YES

Cancel Save

Question Flow

Action type

Go to SMS-Training-NPS

Join conditions with

Or + Add condition

Question Condition Value

NPS Value Confirmation equal NO X

GOTO SMS-Training-NPS IF NPS Value Confirmation equal NO

Cancel Save

SMS Survey creation

Open question

Questions Reorder Graph Add question

Survey invitation text "ADDITIONAL" SURVEY INVITATION TEXT WITH CHOICE Dear customer, you are rec...	YES/NO	📄 ⚙️ + 🗑️ ☰
SMS-Training-NPS NET PROMOTER SCORE On a scale of 0-10 how likely would it be for you recommend ...	SCALABLE	📄 ⚙️ + 🗑️ ☰
NPS Value Confirmation NPS CONFIRMATION QUESTION Dear customer you scored us with {{question6203_a...	YES/NO	📄 ⚙️ + 🗑️ ☰
SMS-Training-Open OPEN QUESTION Could you please be more precise and tell us the reason of your score.	OPEN	📄 ⚙️ + 🗑️ ☰
SMS-Training-Finish THANK YOU MESSAGE Dear customer thank you so much for your feedback!	FINISH SURVEY	📄 ⚙️ + 🗑️ ☰

Questions Survey Settings Common Settings Language Settings Statistics Quarantines Customers

Customer Training-SMS Survey (Volkan) Question ID: 6204 Channel: SMS EN Send invite

General

Title * SMS-Training-Open

Type * Open

External id SMS-Training-Open-Ext.Id

Question text

Text	OPEN QUESTION Could you please be more precise and tell us the reason of your score.	EN
Error text	Please let it us know, it is important for your future interactions. Thank you.	EN

Cancel Apply Save

SMS Survey creation

Thank you message

Questions Reorder Graph + Add question

Survey invitation text "ADDITIONAL" SURVEY INVITATION TEXT WITH CHOICE Dear customer, you are rec...	YES/NO	    
SMS-Training-NPS NET PROMOTER SCORE On a scale of 0-10 how likely would it be for you recommend ...	SCALABLE	    
NPS Value Confirmation NPS CONFIRMATION QUESTION Dear customer you scored us with {{question6203_a...	YES/NO	    
SMS-Training-Open OPEN QUESTION Could you please be more precise and tell us the reason of your score.	OPEN	    
SMS-Training-Finish THANK YOU MESSAGE Dear customer thank you so much for your feedback!	FINISH SURVEY	    

Questions Survey Settings Common Settings Language Settings Statistics Quarantines Customers

Customer Training-SMS Survey (Volkan) Question ID: 6205 Channel: SMS EN Send invite

General

Title * SMS-Training-Finish

Type * Finish Survey

External id SMS-Training-Finish-Ext.Id

Question text

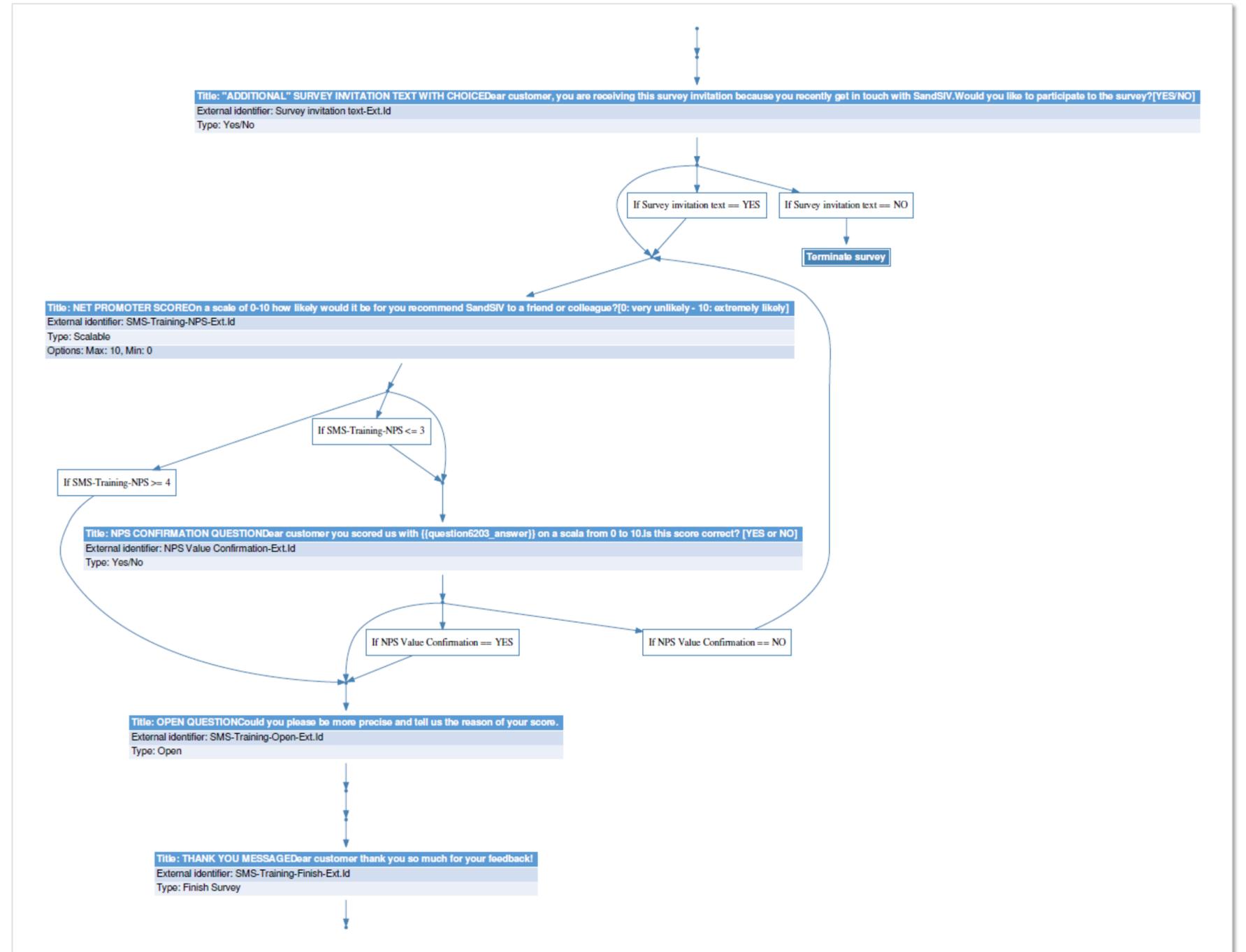
Text	THANK YOU MESSAGE Dear customer thank you so much for your feedback!	EN
Error text	Enter error text	EN

Cancel Apply Save

SMS Survey creation

Discover your conditional flow process

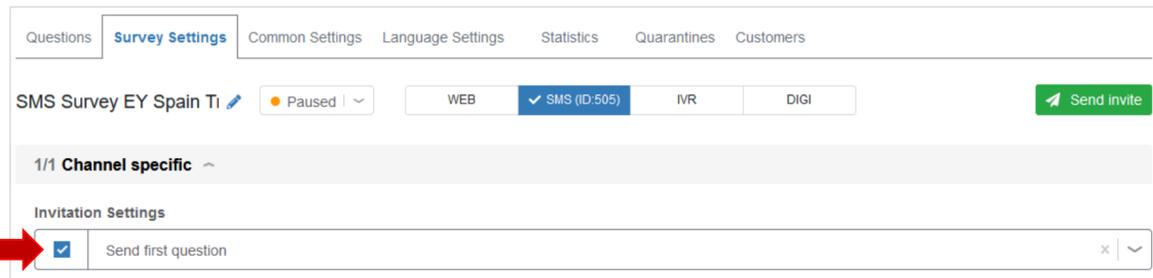
Questions	Reorder	Graph	Add question
Survey invitation text "ADDITIONAL" SURVEY INVITATION TEXT WITH CHOICE Dear customer, you are rec...	YES/NO		
SMS-Training-NPS NET PROMOTER SCORE On a scale of 0-10 how likely would it be for you recommend ...	SCALABLE		
NPS Value Confirmation NPS CONFIRMATION QUESTION Dear customer you scored us with {{question6203_a...	YES/NO		
SMS-Training-Open OPEN QUESTION Could you please be more precise and tell us the reason of your score.	OPEN		
SMS-Training-Finish THANK YOU MESSAGE Dear customer thank you so much for your feedback!	FINISH SURVEY		



SMS Survey testing

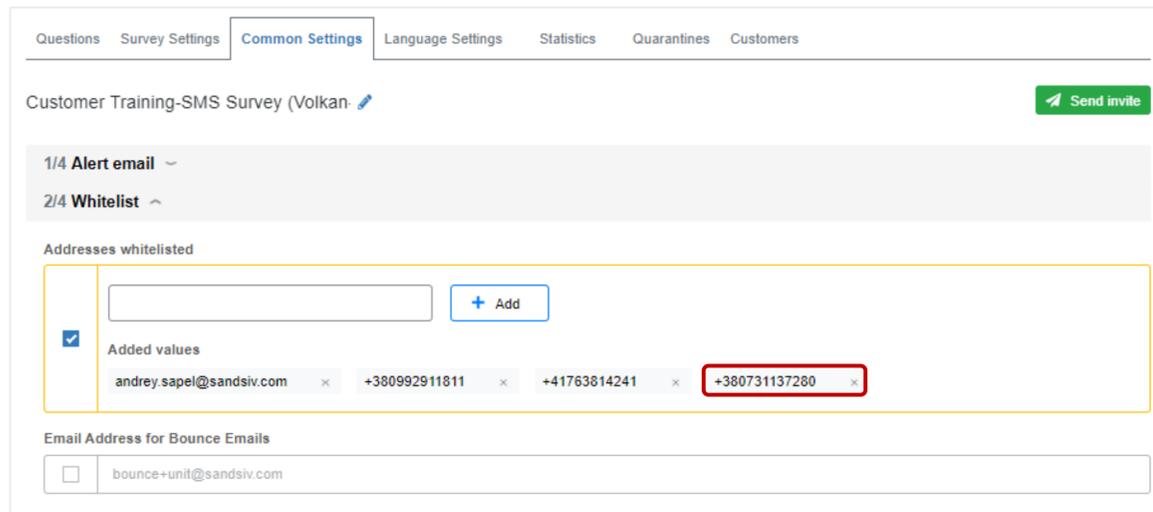
Send, test, check & follow survey's activities

1. Open "Survey Settings" tab and activate "Send first question"



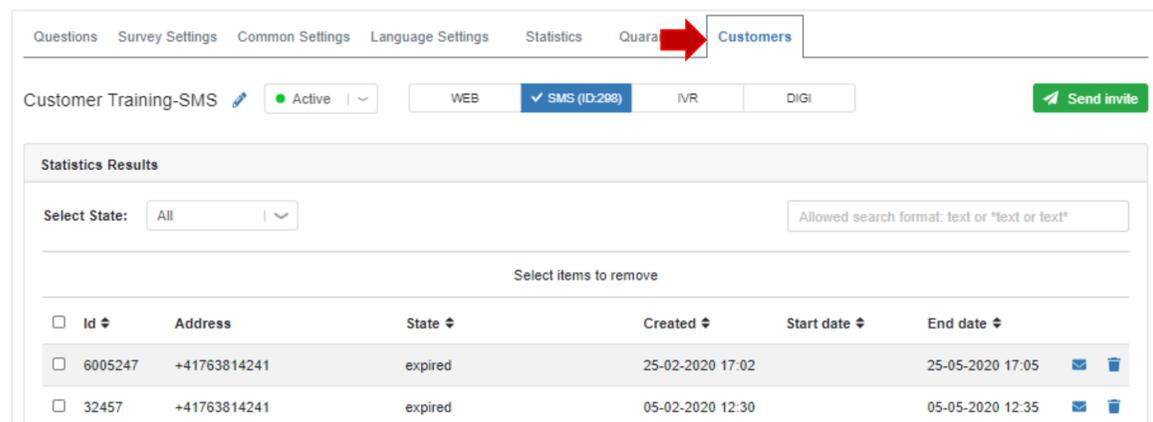
The screenshot shows the 'Survey Settings' tab for 'SMS Survey EY Spain Ti'. The 'Invitation Settings' section has a checkbox for 'Send first question' which is checked. A red arrow points to this checkbox.

2. Add your phone number in the whitelist



The screenshot shows the 'Common Settings' tab for 'Customer Training-SMS Survey (Volkan)'. Under the 'Whitelist' section, a table lists 'Added values'. The phone number '+380731137280' is highlighted with a red box. There is also an 'Add' button and a search input field.

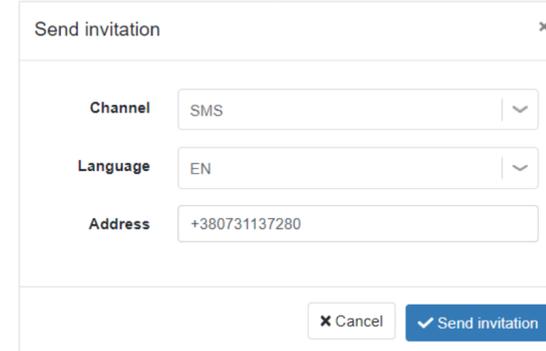
3. Go to "Customers" and select "Send Invitation"



The screenshot shows the 'Customers' tab for 'Customer Training-SMS'. A table lists customer activities. The first row is highlighted with a red arrow.

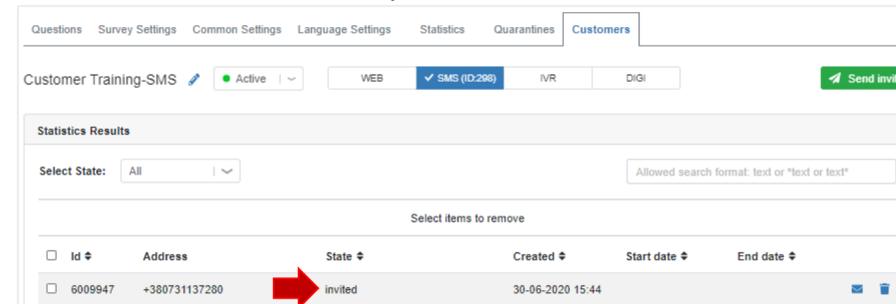
Id	Address	State	Created	Start date	End date
6005247	+41763814241	expired	25-02-2020 17:02	25-05-2020 17:05	
32457	+41763814241	expired	05-02-2020 12:30	05-05-2020 12:35	

4. Insert your cell phone number and "Send invitation"



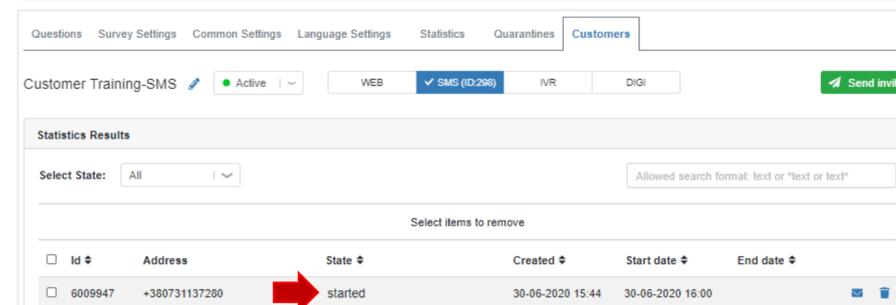
The screenshot shows the 'Send invitation' modal form. The 'Channel' is set to 'SMS', 'Language' to 'EN', and 'Address' to '+380731137280'. There are 'Cancel' and 'Send invitation' buttons.

5. Follow customers survey activities & statuses



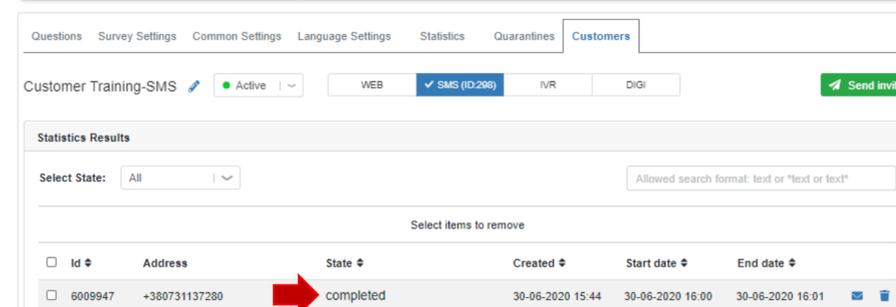
The screenshot shows the 'Customers' tab with a table of customer activities. The first row is highlighted with a red arrow, showing the state as 'invited'.

Id	Address	State	Created	Start date	End date
6009947	+380731137280	invited	30-06-2020 15:44		



The screenshot shows the 'Customers' tab with a table of customer activities. The first row is highlighted with a red arrow, showing the state as 'started'.

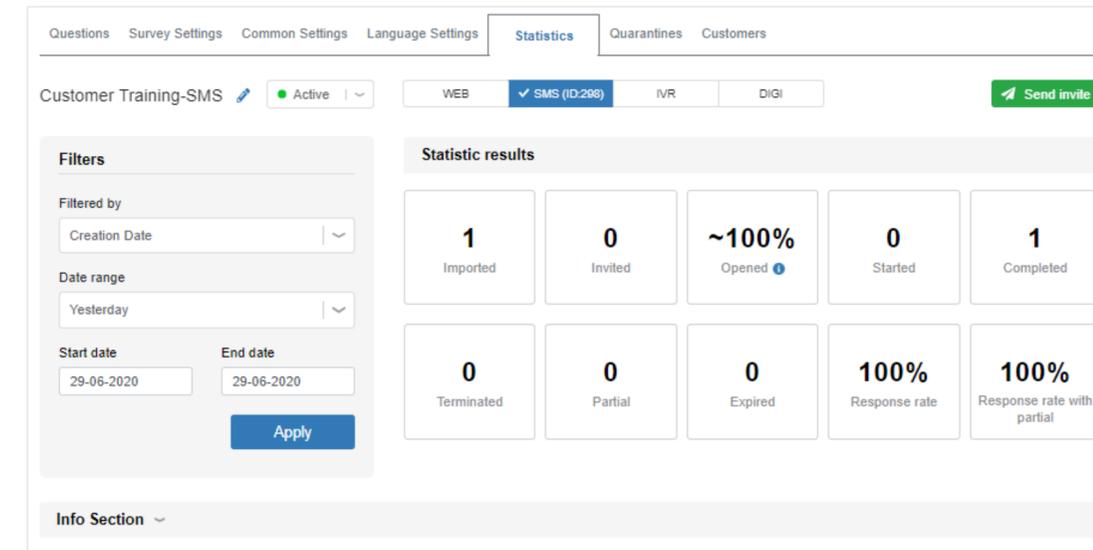
Id	Address	State	Created	Start date	End date
6009947	+380731137280	started	30-06-2020 15:44	30-06-2020 16:00	



The screenshot shows the 'Customers' tab with a table of customer activities. The first row is highlighted with a red arrow, showing the state as 'completed'.

Id	Address	State	Created	Start date	End date
6009947	+380731137280	completed	30-06-2020 15:44	30-06-2020 16:00	30-06-2020 16:01

6. Or check your survey's overall "Statistic"

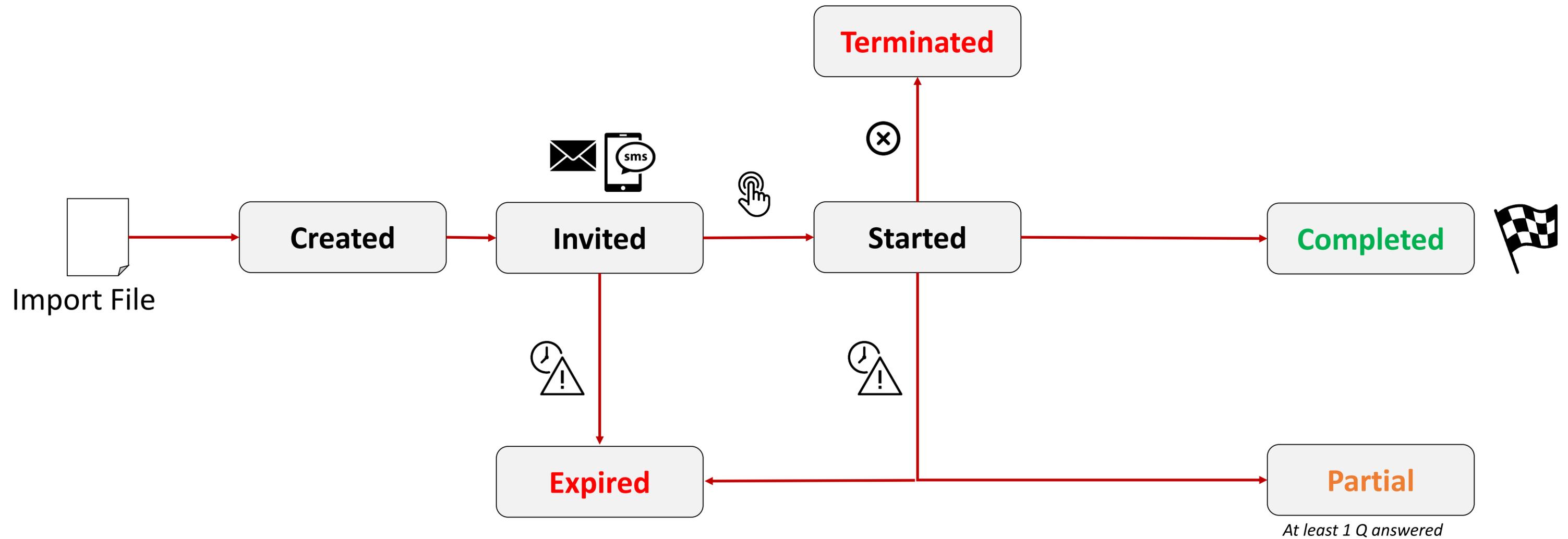


The screenshot shows the 'Statistics' tab for 'Customer Training-SMS'. It displays a summary of survey results in a grid format.

Statistic	Value
Imported	1
Invited	0
Opened	~100%
Started	0
Completed	1
Terminated	0
Partial	0
Expired	0
Response rate	100%
Response rate with partial	100%

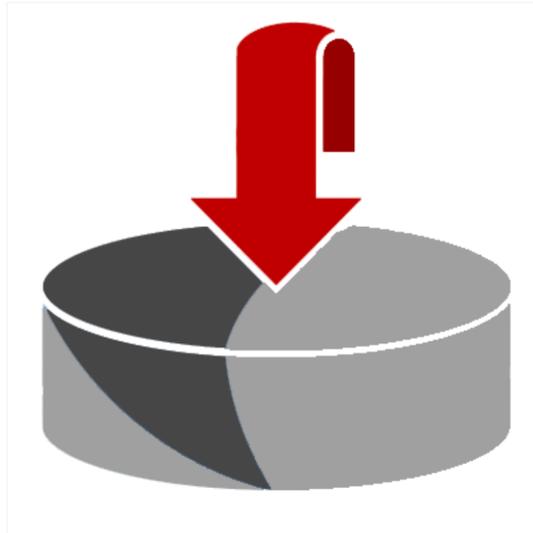
SMS Survey testing

Survey questionnaire status @ VOCHUB



SMS Survey creation

Survey invitation with included import metadata



In case you want to **include import metadata** column value, you can use our custom variable `{{questionnaire | meta:"IMPORT_COLUMN"}}` where the `IMPORT_COLUMN` is a name of a metadata column that was imported to a survey. Let me please explain how it works.

When adding a custom variable `{{questionnaire | meta:"IMPORT_COLUMN"}}` to a survey invitation text/question text, this variable will be expanded to the metadata column value a customer was imported with.

For example, there is a `CITY` metadata column in an import file that contains city names and a customer that was imported with value `Vienna` of the column `CITY`. IF you include the `{{questionnaire | meta:"CITY"}}` variable into your survey invitation text or question text, this variable will be expanded to `Vienna` for this exact customer.

Please pay attention that the column names are case-sensitive and are defined by the first import this column was imported within, e.g. `City` and `CITY` are considered to be different metadata columns by VoC Feedback.

SMS Survey testing

Invite a list of person with “import file”

(<https://support.sandsiv.com/hc/en-us/articles/201177852-Import-Add-Import-and-Import-History>)

1. Create your import file

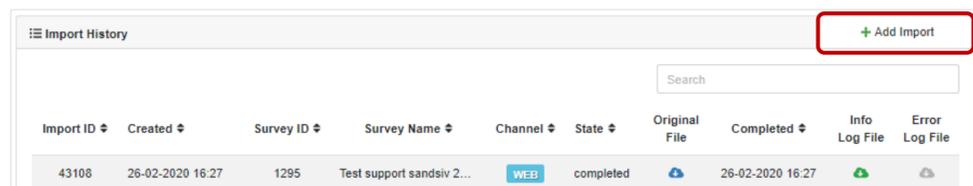
SURVEY_ID	CUSTOMER_ID	ADDRESS	LANGUAGE	Customer name
298	volkan1	41.....	EN	Volkan
298	volkan2	41.....	EN	Francois
298	volkan3	385.....	EN	Sandra

2. Save it as “CSV” file (UTF-8 format)

3. Open the created list with Notepad and check the delimiter type

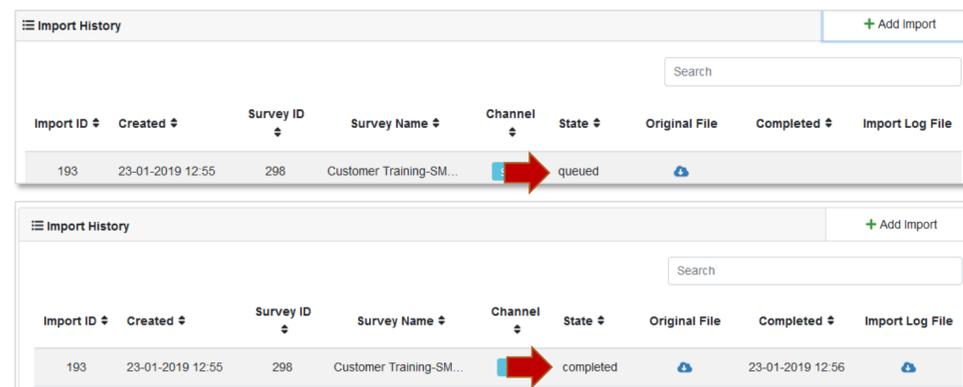
```
SMS Survey addresses import file - CSV - Blocco note
File Modifica Formato Visualizza ?
CUSTOMER_ID;ADDRESS;LANGUAGE;Customer name
1;41763814241;EN;Volkan
2;41793596022;EN;Francois
3;385914692108;EN;Sandra
```

4. Go to “VOC Feedback-Import” and select “+ Add Import”

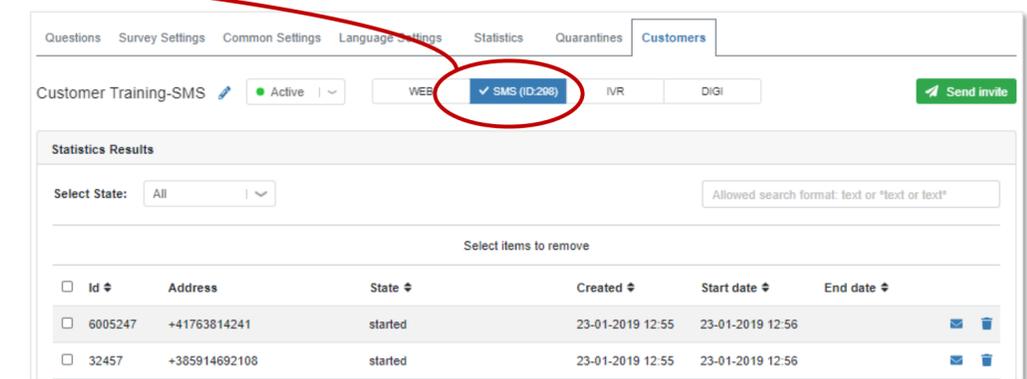


5. Complete the needed fields and select “Save Import”

6. Check the completeness your import file upload



7. Follow “Customers” survey activities



!! Customer !!

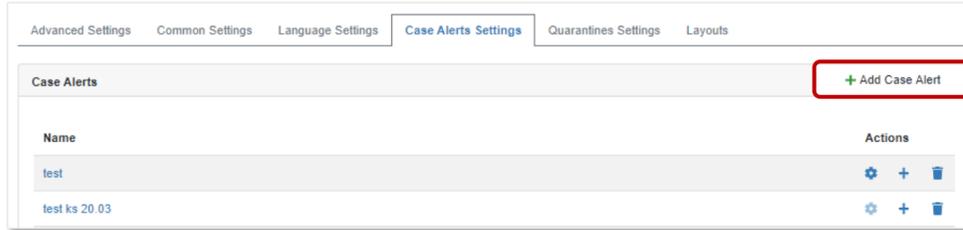
By default Customers list shows the list of customers who were ever imported to VoC Feedback via an file. Please note that once an import is made the record of the Customer is stored even after you delete the related Questionnaire created as a result of the import.

Please go on:
<https://support.sandsiv.com/hc/en-us/articles/115002182589-Customers>

SMS Survey testing

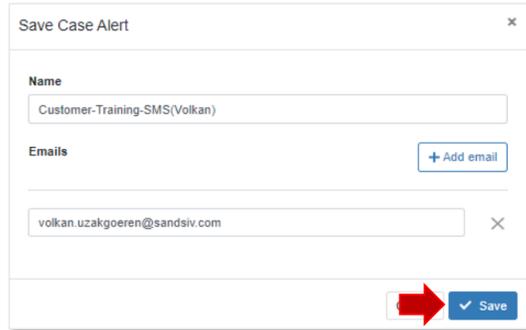
Create your case alert and test it

1. Go to “VoC Feedback - Global settings-Case Alerts Settings” and “Add Case Alert”



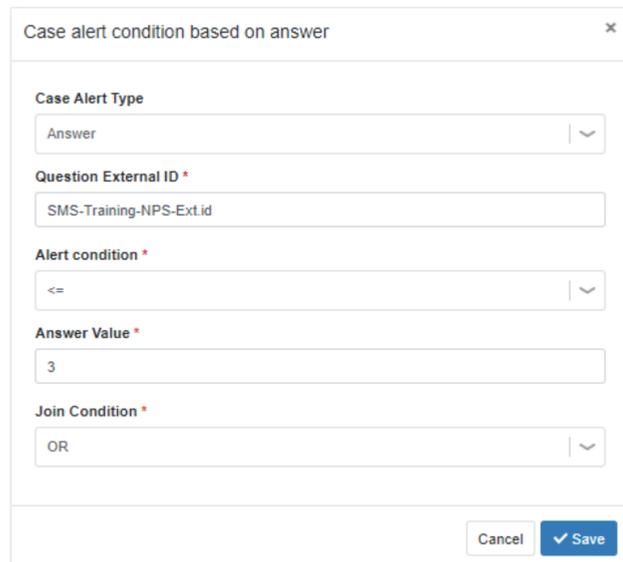
The screenshot shows the 'Case Alerts Settings' page. At the top, there are tabs for 'Advanced Settings', 'Common Settings', 'Language Settings', 'Case Alerts Settings', 'Quarantines Settings', and 'Layouts'. Below the tabs, there is a table with columns for 'Name' and 'Actions'. A red box highlights the '+ Add Case Alert' button in the top right corner. The table contains two entries: 'test' and 'test ks 20.03', each with a set of action icons (edit, add, delete).

2. Insert “Emails” boxes to alert and “Save Case Alert”



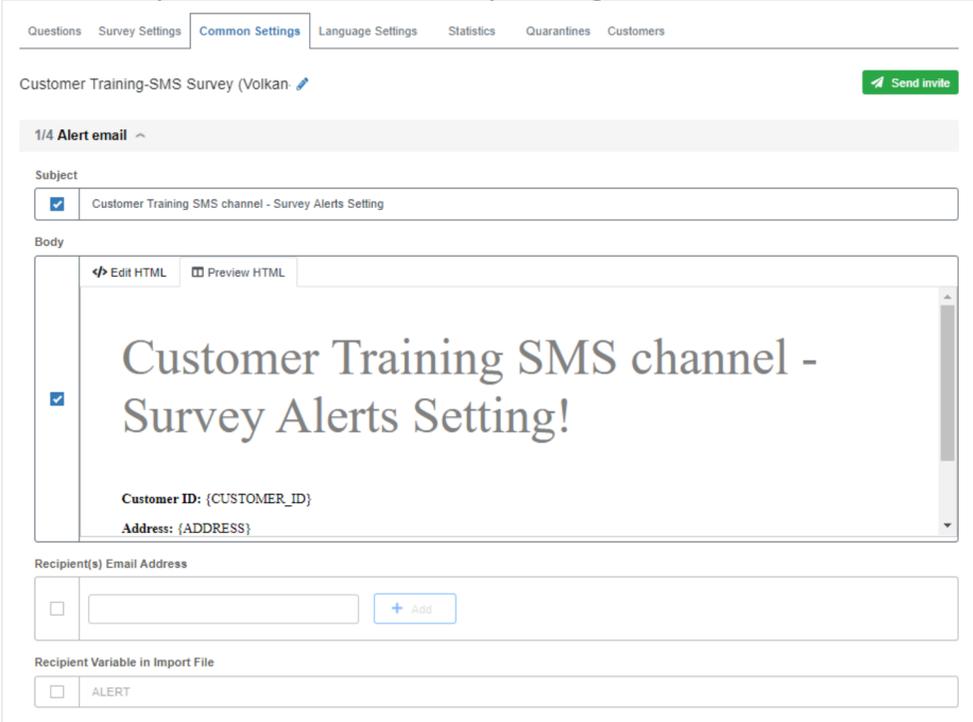
The screenshot shows the 'Save Case Alert' dialog box. It has a 'Name' field with the value 'Customer-Training-SMS(Volkan)'. Below it is an 'Emails' section with a '+ Add email' button and a text input field containing 'volkan.uzakgoeren@sandsiv.com'. At the bottom right, there is a red arrow pointing to a blue 'Save' button.

3. Add (+) your case alert according your needs (Answer score, metadata, classifier)



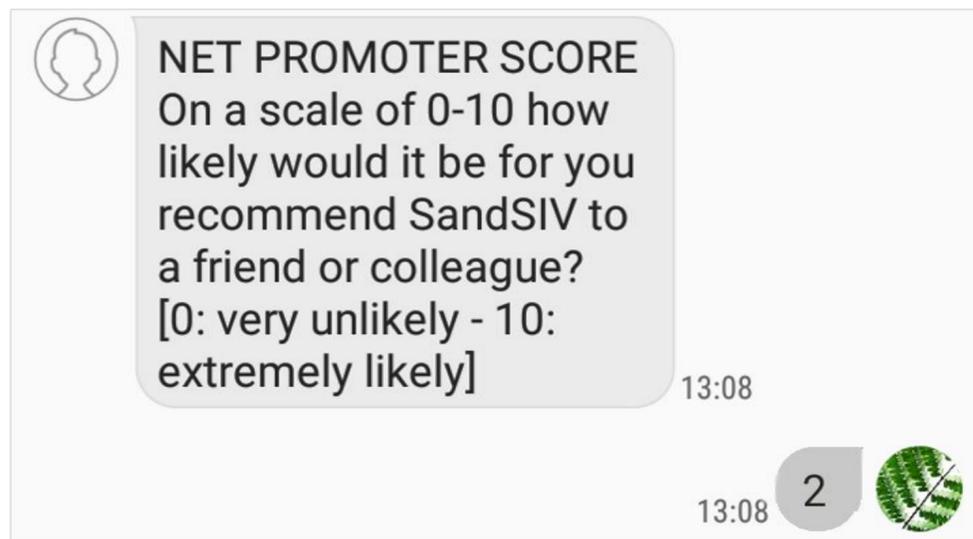
The screenshot shows the 'Case alert condition based on answer' dialog box. It has several fields: 'Case Alert Type' set to 'Answer', 'Question External ID' set to 'SMS-Training-NPS-Ext.id', 'Alert condition' set to '<=', 'Answer Value' set to '3', and 'Join Condition' set to 'OR'. There are 'Cancel' and 'Save' buttons at the bottom.

4. Define your Alert text on survey setting level



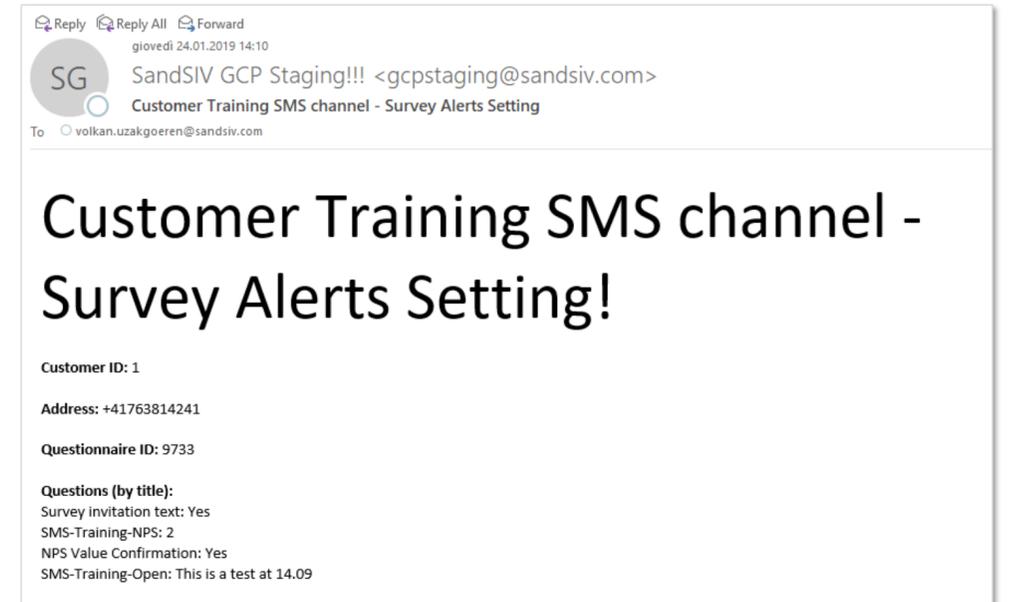
The screenshot shows the 'Common Settings' page for a survey. The 'Subject' field is set to 'Customer Training SMS channel - Survey Alerts Setting'. The 'Body' field contains the text: 'Customer Training SMS channel - Survey Alerts Setting!' followed by 'Customer ID: {CUSTOMER_ID}' and 'Address: {ADDRESS}'. There are 'Edit HTML' and 'Preview HTML' buttons. Below the body field, there are sections for 'Recipient(s) Email Address' and 'Recipient Variable in Import File'.

5. Send and execute the survey



The screenshot shows an SMS message. The text reads: 'NET PROMOTER SCORE On a scale of 0-10 how likely would it be for you recommend SandSIV to a friend or colleague? [0: very unlikely - 10: extremely likely]'. The message is timestamped '13:08' and has a '2' in a circle next to it, indicating two replies. There is a green circular icon with a white checkmark at the bottom right.

6. Check now your mail box



The screenshot shows an email notification. The subject is 'Customer Training SMS channel - Survey Alerts Setting'. The body contains the following information: 'Customer ID: 1', 'Address: +41763814241', 'Questionnaire ID: 9733', and 'Questions (by title): Survey invitation text: Yes, SMS-Training-NPS: 2, NPS Value Confirmation: Yes, SMS-Training-Open: This is a test at 14.09'.

SMS Survey testing

Check survey's answer on a small dashboard in VOC Visual

1. Go to "VOC Visual" and choice "+ New dashboard"
2. Give an appropriate name and "Approve"

Create dashboard

Title * Customer Training-SMS Dashboard (volkan)

Set as default *

Copy existing dashboard

Close Approve

3. Select "Add gadget"

Dashboards

+ New dashboard

Customer Training-SMS Dashboard (volkan)

Tools + Add gadget

Dashboard doesn't have gadgets
Add new gadget

4. Select "Please, configure gadget"

5. Select data source, columns you want to see and chart type

Edit gadget

Basic 6 Advanced 7

Select data
Customer Training-SMS Sur... SMS SURVEY

Select column
SMS-Training-NPS SCALABLE
SMS-Training-Open OPEN

Select Math function
Just show

Group by

2nd Group by

Chart type

Close Approve

6. Check the result

Customer Training-SMS Survey *Volkan) : SMS-...

SMS-Training-NPS	SMS-Training-Open
N/A	1
N/A	N/A
N/A	This is a strange reaction...
N/A	Test
N/A	This is a bug ;)
N/A	Its strange
9	This is a test of Volkan
10	I don't know
N/A	SandSIV is the best and Volkan is...
7	Sorry, I meant 10

10 items per page
1 - 10 of 10 items

SMS Survey testing

Check survey's answer on a small dashboard in VOC Visual

1. Add a new Gadget with the following setting

Edit gadget

Basic 7 Advanced 6

Select data
Customer Training-SMS Sur... SMS SURVEY x

All data Surveys Uploads Virtual

Survey status
 ACTIVE PAUSED DELETED

Select column
NPS SEGMENT SMS-Training-... NPS_SEGMENT x

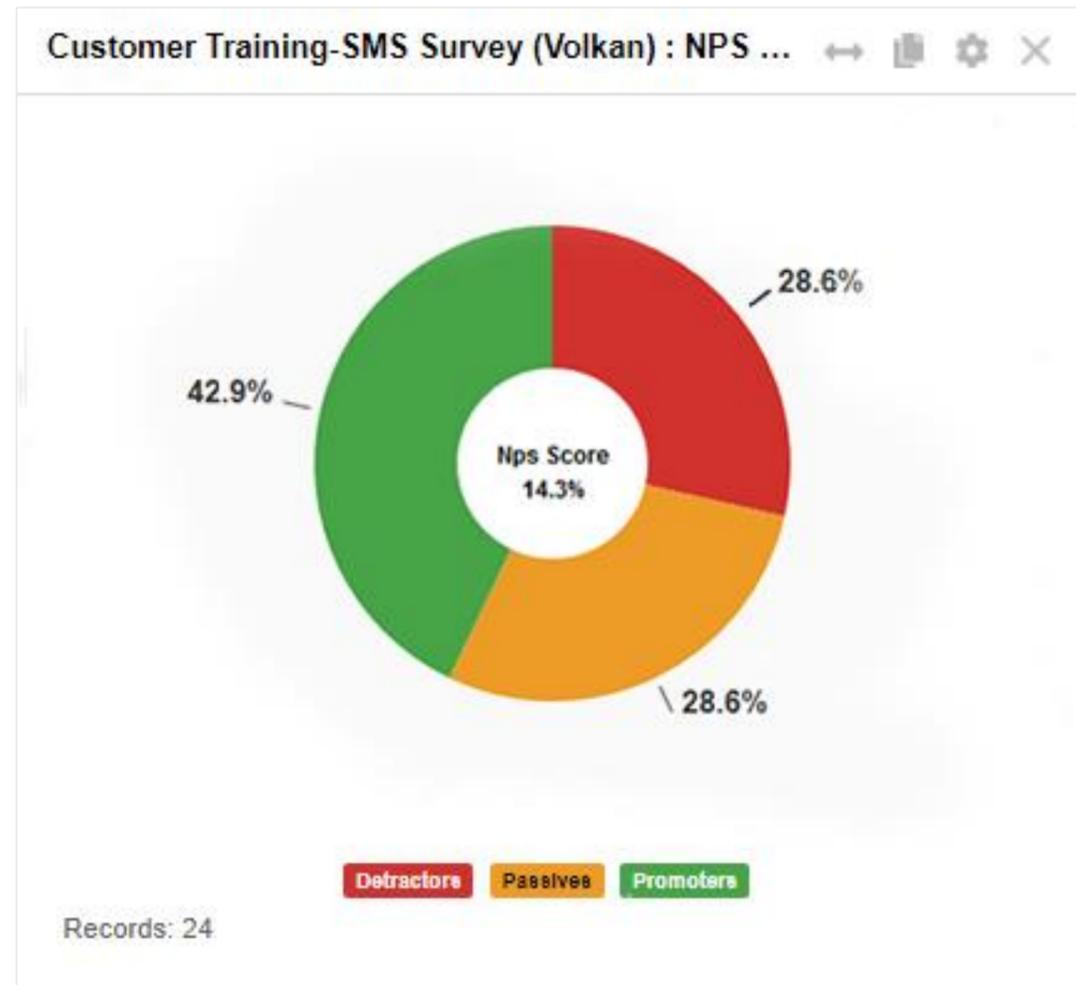
Select Math function
Count x

Group by

2nd Group by

Close Approve

2. Check the result



3. Send the survey again to yourself

4. Check the results your feedback directly in the dashboard

Customer Training-SMS Survey (Volkan) : SMS-... Customer Training-SMS Survey (Volkan) : NPS S...

SMS-Training-NPS	SMS-Training-Open
N/A	1
N/A	N/A
N/A	This is a strange reaction...
N/A	Test
N/A	This is a bug ;)
N/A	Its strange
9	This is a test of Volkan
10	I don't know
N/A	SandSIV is the best and Volkan is...
7	Sorry, I meant 10

Nps Score 0.0

37.5% 25.0% 37.5%

Detractors Passives Promoters

Records: 8



BECAUSE BEING HUMAN IS A GOOD BUSINESS

sandsiv+
customer intelligence made in switzerland