Demographix for Beginners 3

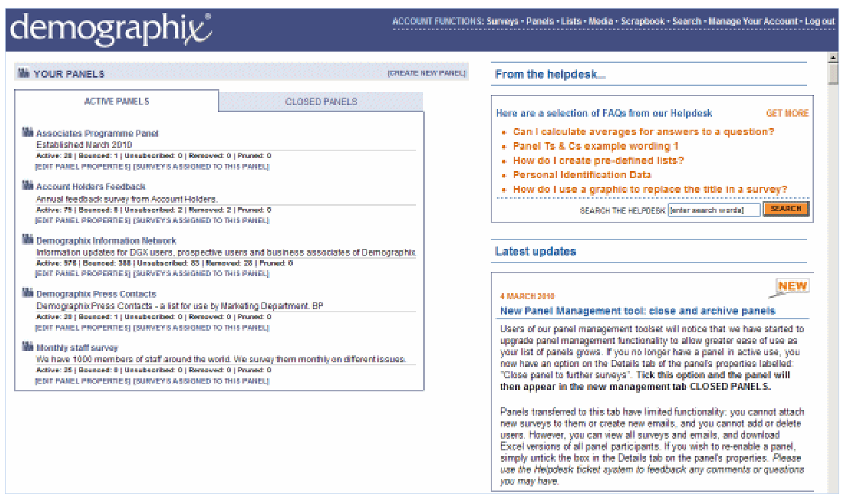
What is this? *One of three short documents that let new users get up-to-speed FAST with building complex surveys; creating in-depth reports using filters and crosstabs of data; and then moving on to easy-to-use panel management and email creation to get better responses from mailing lists. The documents in this series are: 1. Survey Building Essentials; 2. Analysis & Reporting Essentials; and 3. Email & Panel Management Essentials*

Email & Panel Management Essentials:

1. The Panels Interface:

Panels link: If you have permissions to use our email and panel management module, there will be a link labelled "Panels" next to the "Surveys" link in the Account Functions menu strip, right at the top of the Demographix screen. Click on this link and you will be taken to the Your Panels workspace.

Your Panels workspace: This has been designed to create a similar user experience as the main Demographix surveys workspace. Any panels that have been created for your account are shown on the left-hand side, although initially this may be blank until you create your first one. The Information Area (the column headed "From the Helpdesk...") is shown at right. Note that the panel listing has two tabs: Active Panels and Closed Panels. These are fairly self-evident – you can close a panel and archive it at any time after its creation. To delete a panel completely, contact the Demographix Helpdesk.



Create new panel: Above the two panel status tabs, also note in the strip headed Your Panels, a "Create New Panel" function. If you click this option, a Create New Panel properties form will appear at right. You need to give the panel a name in the top field, and then use the second field for a description or internal notes. Press the "Create new panel" button, and the panel will be set-up and shown in the list at left.

Panels listing: For every panel in your account, the following details are shown beneath its name and description:

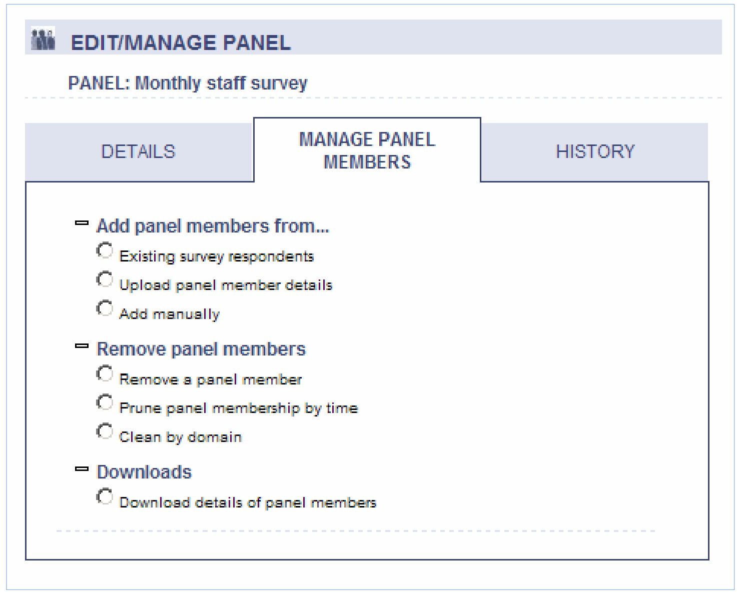
Active: 0 | Bounced: 0 | Unsubscribed: 0 | Removed: 0 | Pruned: 0
[EDIT PANEL PROPERTIES] [SURVEYS ASSIGNED TO THIS PANEL]

The first line shows you the number of active panellists; the number of bounced members (we distinguish between actual email server bounce notifications and Out of Office messages); the number of members who have unsubscribed or been removed by the panel owner, and members who have been "pruned" (more on this later). Initially these will all read "0", and will change as members are added or emails are sent out. Beneath this are the two main panel actions available to you: edit panel properties (where you can add or manage panel members) and assign or view the surveys attached to this panel. For more on both of these, see below.

Hot tip: The Panel Management interface makes a lot of sense if you stop to think of a panel having three main components: a Membership list; Surveys attached to it for all or part of the members to answer; and Emails linked to the surveys, asking members to respond. P = M + S + E. To set-up and use a panel you will need to provide all three of these, though some components can be assembled in different ways. The interface is designed to help you focus on the level you're working on – managing the panel, attaching a survey, or creating emails attached to the survey. We'll now look at each of these in turn:

2. **Managing your panel:**

Edit Panel Properties: The first function available to you is to edit the panel's properties. This is where you can change the name or details of the panel, close it to further surveys, manage panel members and view the History – a log of events associated with the panel. You'll note the three tabs in the panel management properties box when you click the link. The most powerful functionality is on the Manage Panel Members tab (*as shown at right*). Here you can add and remove panel members, and download details of panel members into Excel files. Let's look at these functions in turn:



Add panel members: We need only three pieces of data for each panel member – a FIRSTNAME, SURNAME and EMAIL ADDRESS. You may have these details in an Excel file, or you may have them in the data collected in a panel sign-up survey. Demographix allows you to import directly from a survey or upload an Excel file.

Hot tip: A Panel Membership sign-up survey is always a good way to begin building a panel. You can include terms and conditions in it, and get participants to tick opt-in statements. You can also pipe their write-in responses to names and email addresses into a final page confirmation question to weed out data errors. (e.g. "You entered your name as: [piped answer]. Is this correct? Y/N"). Demographix allows you to access responses to this survey and upload the three key elements into the panel, applying a filter on including only those who have opted-in.

You can add panel members from...

- **Existing survey respondents:** Choose this option and you will be asked to search the survey from which you want to acquire the data. The system then needs to match up the write-ins contained in the survey with the three pieces of panellist data required. Select the question in the survey that holds the data for Firstname, Surname and Email address. An "Eligible respondent count", based on the survey respondents who have completed all three questions, will then appear. You now have the option to filter the respondent count on how they answered a question in the survey (for example, you may want to filter out based on how they answered an opt-in question or a key demographic question). You do not need to apply a filter. Now click the "Add to panel" button to insert these respondents into your panel membership.
- **Upload panel member details:** You can upload a standard Excel (.xls) file with panel member details. The file must have three columns of data only. It must also have no panellist data in the first row, as the system assumes this row has column headings (firstname, etc) and strips it out. Use the "Browse" button to find and select the relevant file on your machine or network. Give this upload an identifying description, then click "Upload panellist file".
- **Add manually:** This allows you to add individual panellists, a few at a time. Simply add details and click the "Add panel members" button. The membership count will automatically update.

Remove panel members: There are three ways you can remove panel members. The first is to search on the email address – if the member belongs to more than one of your panels, you will get the option to remove him/her from individual panels. The second method is to prune the panel membership by time – removing members who have not responded to a survey invitation over different periods of time (or never). The third option is to clean by domain. For example, you may wish to remove all panellists at a given domain, such as hotmailer.com. The system will alert you to how many panellists will be removed before asking you to confirm and proceed. Remember that any member removed from the panel is designated in the Removed members list. You can read them to the active list simply by adding them again.

Downloads: You can download your panel member list, or subsets of it, at any time. Choose All if you want a full listing, or tick the boxes for subsets of the list that you need (Active, Bounced, Unsubscribed, Manual removals, Pruned). An Excel file is generated with tabs for each of the categories that you selected. You can download and save this file to your computer.

demographix®

Now that you've created your panel and assigned members to it, we can attach a survey to it, create emails and schedule them:

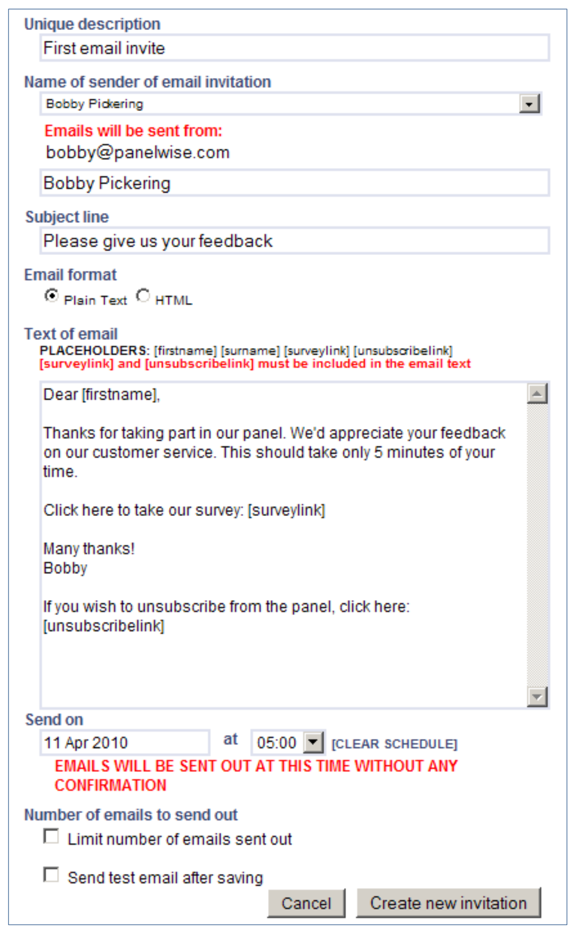
3. Assigning a survey and creating email invites:

Assign a survey: Beneath each panel listing are the two actions mentioned above: [EDIT PANEL PROPERTIES] and [SURVEYS ASSIGNED TO THIS PANEL]. Clicking on the second option will display a list of surveys assigned to this panel (if any). In the example shown here, there is one survey titled *Courier company* that has been assigned. To assign another survey to this panel, click the [ASSIGN SURVEY TO THIS PANEL] option, highlighted in red here. A search facility now appears, allowing you to search on a keyword to find the relevant survey. Alternatively, leave the search box blank to bring up a dropdown list of all surveys available to be assigned to this panel.

Hot tip: Surveys must be published and open to responses in order to be attached to a panel. If you cannot find a survey, go to your survey workspace and check to make sure that your survey is NOT in production or closed to responses.

Manage email invitations: Once your survey has been assigned, you'll see it list below, with details of its status and responses. There's also an option next to the title: [MANAGE INVITATIONS FOR THIS SURVEY]. Click on this and the system will display a list of emails (if any) that have been created for this survey and panel. If there's none there, then click [CREATE NEW INVITATION]. The email building interface, *shown at right*, is an extremely simple one. It asks for the following details:

- **Unique description:** This is for internal reference only to identify different emails sent – so give it a simple management-oriented name like "Reminder email".
- **Name of sender of email:** Here you will see a drop-down list with the names of all the assigned panelwise email addresses available to your account. We can assign new ones for you, via the Helpdesk. Select a name from the drop-down list and the system will fill in the sender details automatically.
- **Subject line:** This is what your panel members will see when they get an email from you, so make it clear what is being sought. It's always a good idea to have a call to action: e.g. "Calling all XX panel members: let us know what you think about XX!"
- **Email format:** You can have either plain text emails or HTML emails. Plain text emails are more likely to get through firewalls and email servers in big organisations, and are much easier to create. HTML emails must be created as separate files and uploaded into the system.
- **Text of email:** As shown in our example at right, this is where the text of your email goes. Note that you can use four placeholders – keywords in square brackets that will indicate where the system must insert member-specific details into each individual email. Two of these are compulsory: a [surveylink] and an [unsubscribelink]. Both must be present in every email for the system to work.
- **Send on:** Now specify the date and time that you want this email to be sent out.
- **Number of emails:** You can restrict the number sent to a random selection here, but more sophisticated sub selection is also available – more about this later.
- **Create invite:** Now press the "Create new invitation" button and your new email is scheduled for action.



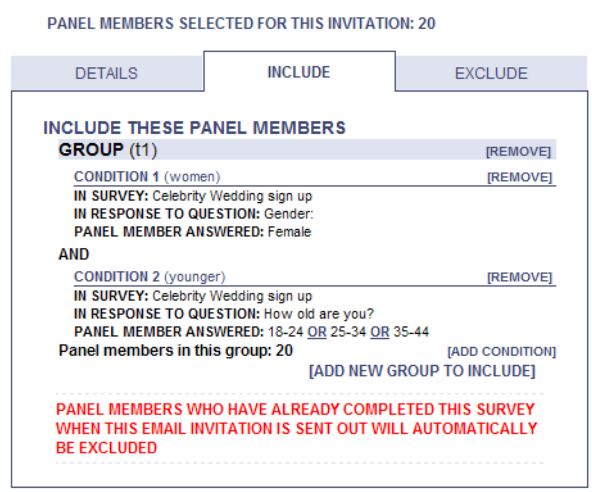
Hot tip: Tick the "Send test email after saving" option, before creating your email. It will send a test version of the email to you so you can see what the email will look like. After your email invite has been created and scheduled it will appear in the list of email invitations assigned to this survey and panel. If it is scheduled to be sent, it will appear in red. Alongside it are four options: [EDIT] [VIEW] [DUPLICATE] and [DELETE]. The email can be edited up until its scheduled time, as well as viewed, duplicated or deleted. Once sent, the [EDIT] option is no longer available.

4. Using Groups and Conditions:

Introducing Groups: You don't need to send your email invitation to all of your panel. You may want a particular survey to be answered only by a sub-group of panel members – say Men under 30. Groups are created by specifying Conditions. In this case, you would therefore need to create a Group made up of two Conditions: All Men from the Registration Survey (condition 1) and All People Under 30 (Condition 2). To belong to the Group, members must meet ALL conditions, so in this case the invitees are Men who are Under 30 (where the two conditions are both true). If you wanted to send this invite to All Men AND All People Under 30 (including women), you'd need to create two separate groups: one group, all men; the other group, all people under 30. You could, in fact, use the same conditions as above, if they have already been created. This second invite would be sent to the superset of both Groups.

Hot tip: Groups are specific to email invites, and are not created for repeated use. Conditions, however, are usable by other Groups, and once created go "on file", so to speak, for that panel. Therefore, give Conditions names that will be significant identifiers for later re-use – e.g. "All Men in the Registration Survey" or "All owners of Ford cars in the Registration survey".

Creating a Group: Once an email invitation has been created, you can click the Edit option next to the Email invites name. Under EDIT EMAIL INVITATION, click on the INCLUDE tab. Initially there are no Groups shown. But selecting [ADD NEW GROUP TO INCLUDE] will enable a pop-up window that will specify the panel name, survey and email invitation it is associated with. First, give your Group a name. For example, "Men Under 30". Then you need to select the first Condition for being part of this Group. There are two options: "Choose an existing condition" and "Create a new condition".



Choose an existing condition allows you to choose from the conditions listed on the pull-down menu directly beneath (assuming conditions have already been created in this panel). If none on the list are suitable, you need to opt for...

Create a new condition begins a new process...

1. "Select the basis of the first condition in this new Group" gives you a range of options, including how panel members responded to previous invites and surveys. Depending how you answer this, different options appear beneath.
2. Select the survey or invite which is relevant to this condition.
3. Select the relevant question in the survey OR choose an option as to whether they completed the survey or not. For the latter option you are then asked to skip over 4 and 5 and go to 6 (name the condition).
4. If you have chosen a question in a survey, you will need to select the response/s which are required for this condition
5. Now you're asked whether all of the answers or just one of the answers is required for the condition to be true.
6. Finally you must now give the condition a name. Once again, this is reusable in other Groups for this panel, so make the Name as descriptive as possible. For example "All men in the Reg Survey".

Save Group: After you've created your Conditions(s), click on "Save the New Group". This will now be listed under the Include tab, and will show the full details of the first Condition associated with it. If you click on [ADD CONDITION], you can then construct a second condition that will be added to the Group, as described in the process above.

Exclude tab: Under the Excludes tab, you can follow the same procedures to create Groups for specific exclusion.

Important Note: Neither the Excludes or Includes tabs are compulsory. If you wish to send emails to all of your panel simply ignore these tabs. If you later change your mind before sending an email invitation out, both groups, or conditions within groups, can be deleted.