



Alchemer

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Alchemer is a robust survey engine that lets you create simple or complex surveys to be sent out to your constituent group. The Mountaineers has two accounts with Alchemer for its branches to utilize. Because Alchemer can become very complex if you want robust data, people sometimes run into trouble creating complex surveys - it's easy for staff to help you in that situation. You can also view surveys made by other volunteers, and if you like it, you can copy and tweak it rather than starting from scratch!

Try logging in with the first account. If it says it's in use, rather than kicking someone else out, try logging in with the 2nd account. Please be courteous to your fellow volunteers and log out as soon as you are done!

Link to Alchemer >> <http://www.alchemer.com>

Account #1:

Username: **info@mountaineers.org**

Password: **branches**

Account #2:

Username: **volunteer@mountaineers.org**

Password: **Volunteer1906!**

If you need help creating a survey, contact Michelle Song at michelles@mountaineers.org.

Best Practices

Check the Communications Calendar

If you plan to survey a large audience (as opposed to just surveying the roster from a course or a small meeting group), please check in with Kristina Ciari (KristinaC@mountaineers.org) to ensure that your survey is not getting sent out right before or after another survey that went to some or all of the same audience. It is very important that we are respectful of our contacts, and this kindness will be repaid with a higher response rate and fewer opt-outs.

Take the time to do it right

Plan on spending approximately 8-12 hours (especially for larger audiences) developing your survey. This includes:

- Selecting the right questions
- Putting them in the right order
- Formatting the questions
- Using the *logic* feature to make the survey user-friendly



- Testing the data
- Getting 2-3 others to review
- Spell check
- Offer suggestions and test
- Ensuring the style is correct
- Uploading contacts and building your email invitations

It may sound daunting, but you'll be grateful that you did when you don't end up with a survey that results in feedback you can't use.

Use a Welcome Page

All surveys should start with a "Welcome" page, thanking the user for taking the survey, explaining the purpose of the survey, and indicating how long the survey should take.

Use the Logic Feature

Any question that is dependent on the answer from a previous question should use the *logic* feature.

For example, instead of Question #1 "Do you drink coffee?", Question #2 "If yes, what kind do you drink?". Use *logic* to create this flow:

1. Set Question #1 as "Do you drink coffee?" with the response options as "yes", "no", etc.
2. Set Question #2 as "What Kind?"
3. Enable the *logic* feature for Question #2 by selecting: "Only show this question based on answers to previous questions or other logic conditions" *See image below*
4. Then select the previous question in the drop down. For this example, the previous question you would select is Question #1: "Do you drink coffee?"
5. Then in the second drop down, next to the first drop down, enable the logic operator as "is one of the following answers" and select the corresponding answer that will initiate this logic enable question. For this example, the answer would be "yes"

The screenshot displays the Alchemer survey builder interface. On the left is a dark sidebar with navigation options: Projects, Audience, Design Library, Research Library, Integrations, Account, Support Center, Alchemer University, and Security. The main workspace is titled 'BUILD' and shows a survey question: '3. We are planning to develop an initial... alright with one of The Mountaineers sa... feedback?' with radio button options for 'Yes' and 'No'. Below this is question '4. Full Name *' with a text input field. A third question, '5. Email *', is partially visible. A 'Logic Rule' configuration panel is open on the right, with the 'LOGIC' tab highlighted by a yellow circle. The 'Logic Rule' panel includes a checked checkbox for 'Only show this question based on answers to previous questions or other logic conditions'. Below this is a 'Remove All Logic' button and a configuration area with two dropdown menus: the first is 'Q 3. We are planning to develop an...' and the second is 'is one of the f...'. The 'Yes' radio button is selected. There are '+ Add Condition' and '+ Add Group' buttons. At the bottom of the panel are checkboxes for 'Save this question's data if hidden after initially shown', 'Hide this question by default (mainly used with custom scripting)', and 'Only show this question to admin users'. Below these are 'Disable Question' options with 'Yes' and 'No' radio buttons, where 'No' is selected. An 'Alias' field is also present. At the very bottom of the panel are buttons for 'Add Another Question', 'Save Question to Library', 'Cancel', and 'Save Question'.



By enabling *logic*, survey takers only have to see the questions that are relevant to them. You get better feedback and they save time, and we all look more professional.

Format your fields

Format your text boxes and other fields so they look good to the user. In the edit field of every question, you can select the "Layout" tab which allows you to specify the size of your fields.

Demographic Question Guidelines

1. Unless demographic questions are used as disqualifiers, all demographic questions should be at the end of your survey. They will be less of a turn-off than at the beginning of a survey, and if the rest of your survey is well-built, you will build the trust of the survey-taker and they are more likely to give you demographic information. Plus, it's often considered polite to wait until the end for these questions
 - Note: in a world with ever-increasing diversity, remember to be as inclusive and open in what you ask people.
 - For example, many people do not view themselves as merely one race or gender. Don't design a survey that forces them to select an option they don't identify with. See #2 for help with this.
2. Use the demographic questions in the question library. When you are building your survey, you can select "*insert from library*", select the "*standard questions*" folder, and choose "*demographic questions*". You can then add or delete questions from that page. We have worked hard to create well-phrased, standard demographic questions so that we collect good, consistent data and so that we illustrate that we are both inclusive and sensitive.

Avoid Requiring Questions

Requiring questions sometimes makes people mad and encourages them to quit the survey. Only require questions that impact logic later in the survey.

Create an Email Campaign

Unless there is a very good reason to send a link to your survey (if you want a wide range of random responses and want to put the link on Facebook, for example), please create an email "campaign." By using email campaigns, you can track your responses, send reminders only to those who have not completed the survey, and drill down for detail. The data is much more quantifiable and analysis more reliable because your audience is controlled and tracked. Please also personalize the greeting using assigned fields.

Add a "Save and Return Later" option

If your survey is more than a 10 minute survey (you can tell by using the Alchemer analysis), add the "*save and return later*" option to your survey. It is customer-friendly, and they will receive reminders to go in and complete the survey. You will have a higher response rate and completion rate.

Review, Test, Fix, Test

You've just spent lots of hours building your survey, and you are probably tired of it. However, at this point it would be a shame to send out a mediocre survey after all of the work you did. Please take the time to test it, and engage others in the testing and review process. Steps are listed on the next page.



Review, Test, Fix, Test continued

Please take the following steps:

1. Ask someone to review your survey for spelling, formatting and semantics.
2. *Test* your survey
3. Send a test email to at least two other people. Ask them to review your email *and* take the survey.
Check the following:
 - a. Email subject
 - b. Email "reply to:"
 - c. Email greeting
 - d. Email content
 - e. Survey welcome page
 - f. Spelling, formatting and readability of questions
 - g. Check ALL of the logic by trying to click different answers.
4. Take the time to fix the things that need to be fixed.
5. Run a test report and make sure the data spits out the way you want. If you fix it AFTER people have taken it, you will mess everything up.

Make Great Reports

If you don't take the time to analyze your data, there's really no point in wasting people's time with a survey to begin with. Run reports, play around with them, use the text analysis tool. Once you have a report that you like as the "final final report", delete the unnecessary reports (except for any that are contributing reports to the final final report), and clearly name the final final report. Make it EASY for someone to come in 5 years from now, go to your survey and run the best report. Alchemer has a [lot of resources](#) to help you understand its many tools, but these steps should help you produce a great survey.