

How to Create and Read a MailChimp Survey

1. Creating a New Survey

- a. Set a dates with your club when the survey will start and end.
- b. Log into your MailChimp account.
- c. Select Audience-Surveys
- d. Select New Survey (or if you already started a survey that is in draft, select that survey and click Edit Survey)
- e. Click Add Questions
- f. Choose one of the following for each question you wish to add to the survey, through the “Answer type” option list
 - i. Radio Button if your question is multiple choice with one answer from a list of options
 - ii. Checkbox if the user selects multiple options from a list of options
 - iii. 0-10 to select a score from one number to another
 - iv. Open Text if you ask a question for which the user needs to compose some text for an answer
 - v. Email-not recommended-text answer is sent to an email address
 - vi. Click to turn on the “Required” option after you enter each question if the user must answer that particular question before submitting the survey.
 - vii. Use the arrows on the left side to reposition or reorder a question within the survey.
 - viii. Use “Delete question” to delete a particular question you no longer wish to use.
 - ix. After you are done with one question, use “Add a question” to add the next question.
 - x. When done with all questions, click “Save & close”.
- g. Hints
 - i. When you start with the 1st question, on top of the screen will be a place to “Name your survey”. Give your survey a name and then start filling out your 1st question.
 - ii. If it is an official vote, like for officers or bylaws acceptance, ask for name and rec card number as open texts before asking the survey question(s).
 - iii. If you change you mind about the type of answer you have chosen, for example you chose radio button but really want check box, click the arrow under “Answer type” and choose your new option.
 - iv. If you turn on “Toggle other options”, the user will get a text option for a write-in option if using radio button or checkbox.
 - v. Optional-If using the 0-10 range, click on “set low label” and “set high label” to add a text label to 0 and to 10.
 - vi. As you’re writing your questions, click on “Design” frequently to see how your users will see the survey. When done viewing, click “Questions” to get back to the survey. You will get text and color options when In “Design” mode.
- h. After closing the survey using “Save & close”, your survey is still in draft. Leave it here if you are not finished. Otherwise, you are now ready to send the survey to your club members.
 - i. Click the button to the right of “Hosted Survey” to “Turn On”.

- ii. Under the words "Hosted Survey", click on "Copy Survey URL"
 - iii. Under the words "Hosted Survey", click on "share by Email", and click "Link with automatic response attribution". What this does is save a person's email address who is sending back the survey with their response. This is optional, but highly recommended. This will also give you the option to copy the URL, in case you did not do it with the previous step.
 - iv. Click on Campaigns.
 - v. You will see the survey just like you see any campaigns (emails). Next to the survey name, you can click on the "View" box to see the survey or click on the arrow next to "View" and you will get the option to get the URL, in case you did not do that previously or you did not keep it on the clipboard.
 - vi. Either choose an existing email that you started that is in draft or start a new email.
 - vii. Somewhere in your email, add the link to the survey using the link icon. In the box "Web Address URL", paste the saved link from above, either using Control-V or right-click-paste for PCs or any other method you use for pasting, and click insert.
 - viii. Send out your email either immediately or set a date and time when your email should be sent.
 - ix. When someone fills out a survey, they will get a thank you message back.
2. Getting Survey Results
- a. Quick result spreadsheet (assume you are logged into MailChimp)
 - i. Choose audience-Surveys. Next to survey name is a "View" box. Click on the arrow after "View" and select "Export".
 - ii. Select a location and file name. the file type is .csv, which can be brought into any spreadsheet program for analysis, viewing, saving, and printing.
 - b. Viewing full result statistics (assume you are logged into MailChimp)
 - i. Open up the survey for Viewing using either of the following options.
 - 1. Choose Audience-Surveys, click on the survey name or click on "View" next to the survey name
 - 2. Choose Campaigns, click on the survey name or click on "View" next to the survey name
 - ii. You can check the statistics for each question.
 - iii. Chose "View all responses" to see everyone's returned response.
 - iv. There are "Export" icons in view mode on each page you are viewing. You can use these buttons to export the results to a .csv file that you can open up in any spreadsheet application.
3. Ending a survey.
- a. On the date set by the club to close the survey:
 - i. Log into MailChimp
 - ii. Choose either method from 2-b-i to View the Survey.
 - iii. Click on the button to the right of "Hosted Survey" to turn off the survey.

Name *

Rec Card Number *

Vote for one person for president *

- Mickey Mouse
- Minnie Mouse
- Goofy

Pick two for vice president *

- Donald Duck
- Pluto
- Snow White
- Sleepy
- Grumpy
- Write-in candidate

How did you like the salad luncheon?

0 is low-did not like it at all

10 is high-liked it a lot

0	1	2	3	4	5	6	7	8	9	10
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Submit

Date	Email	Question 1: Name	Question 2: Rec Card Number	Question 3: Vote for one person for president	Question 4: Pick two for vice president	Question 5: How did you like the salad luncheon?
8/5/2020 18:03		Liz M	123456	Goofy	Grumpy,Cinderella	8
8/5/2020 18:07		Gene	007	Goofy	Snow White	3