

PROGRAM SET-UP REQUIREMENTS

To set up a new survey program Strategic Surveys requires the following information, outlined in this document:

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Please review the following pages, and based on your selections supply us with the specified details, and we will be able to set you up a new survey system within 1 to 2 weeks. For report development please contact us to work out your customised requirements and timeline.

1) Program Type

There are multiple program types available and this must be set at the beginning of the process. Our two standard and most commonly used options are:

- **A standard 360, survey based.** This involves participants being sent a link to a nominations survey/form, and also a link to their self-score survey (and/or they can be directly linked there upon completion of their nominations). Respondents are automatically emailed after being nominated and they are also given a link directly to their self-score.
- **A standard manager-approval 360.** This involves participants and their managers being given access to a user portal where they need to nominate, and the manager will approve/reject, their raters. They are also given the links to their self and rater surveys. Respondents are only emailed the survey link directly.

We offer several other customised versions of the above, including:

- **A manager-approval 360 with full user access.** This is the same as the standard manager-approval 360, but respondents/raters are also given access to the user portal. This has the benefit of consolidating respondent reminder emails but adds the extra step of complexity of having to access the portal.
- **A user based standard 360.** Same as the standard 360 but users are directed to a portal to find the survey link (can also be supplied separately). This has the benefit of being able to consolidate reminder emails, if some users are nominated as raters for multiple surveys. However, it adds an extra step of complexity for users since they will need to log in to the portal to get access to their surveys.
- **A standard 180, survey based.** The survey administrator will upload a list of participants and their managers and each will be emailed a link to the self or rater survey. All done via emails and survey links.

- **A user based 180.** As above but participants and managers are given access to the portal. This has the option of consolidating reminders.
- **A self/team survey.** A standalone survey where participants are added individually and fill out the survey about themselves or their team/company.

There is flexibility in these systems – for example if you wanted the option of giving users access to the portal but not consolidate reminders, you can do so. They will receive the link to the portal at the start of the program but you can then continue sending individual survey links and disable email consolidation.

Considerations: There is added complexity when a user portal is involved. Users need to have access to javascript in their browsers, and need to be using IE9 or above (Chrome or Firefox is always preferred to Internet Explorer). Users may have difficulty with logging in via password and prefer to access the survey directly. However if a lot of users will be nominated for multiple surveys, the benefits of them having a single portal and reminder email to access all of them may outweigh the added complexity for users. Generally an email/direct link system is the most straightforward and reduces risk of user errors/issues.

2) Design Template

To set up a new program, several design elements are required. These can be adjusted or changed during the program (as long as the survey structure itself isn't affected) but it is the recommended best practise to set this up prior to the program start date.

- **Client/company branding for the surveys.** This can be to any design specification and complexity – ie. a simple logo in the header of the survey, or a full image-based survey with logos and design elements embedded into the survey itself. Elements required here include images, font styles, colour schemes and layout styles.
- **Client/company logo for the admin portal.** If you or your client will be administering the surveys and accessing the admin portal, you may define a client specific colour scheme and supply logos to be displayed in the admin portal. If not supplied the default is the Strategic Surveys logo and colour scheme.
- **Client/company logo for the user portal.** If you are running a user-based survey, you can also provide client specific logos and colour schemes for the user portal. This will be linked to the admin design above with some shared elements.
- **Email template and design.** You can add images into the emails and design them to your branding. This can also be changed mid program however is recommended to set up at the start. See the next section for the types of emails that content is required to be supplied for.

3) Email Content

Depending on the type of program you have chosen (see section 1), there will be multiple types of email templates to set up. These include the invites and reminders for all users, as well as any portal-based emails such as login information and forgotten password emails. If

you have a base template for emails we can adjust the design each time without changing the majority of the content, however initially we will require a basic outline (content and style) for the following:

- Participant Invitation Email
- Participant Reminder Email

If using user management, please provide content for:

- User Portal invitation with login information and instructions
- A 'forgot password' email template

If running a 360/180, please provide content for:

- Rater/Manager Invitation
- Rater/Manager Reminder

If running a manager-approval 360, please provide content for:

- An invitation to the manager for the specific participant they are linked to, with portal information for approvals.
- An approval reminder for the manager to approve raters. This will only be sent once one of their participants has nominated raters, and it will be consolidated across all participants for that manager.

If consolidating respondent/rater emails for the user managed system, please provide content for:

- A Respondent (for the 360) or Manager (for the 180) consolidated survey reminder.

When you have selected a program type and it has been set up for you in our system, you will be able to access an 'Email Templates' page in the administrator portal that clearly outlines the different types of emails your chosen program requires, and allows you to edit them yourselves.

4) Optional Program Settings

There are several additional options you can set for a survey system – preferably at the beginning of program setup.

- **Individual database and domain.** Your client may prefer that their data is on a domain branded only to them (e.g. clientname.surveylink.co)
- **Include participant gender.** You can optionally include a 'gender' option for participants – Male, Female, or Other. This can be used in customising rater emails and survey text. E.g. 'This will help [participant name] in her development'.
- **Include additional participant attributes.** You can optionally upload extra participant attributes, such as Title or Role, and then refer to these in the emails and reports as well. These cannot be linked to the surveys but can be used in all correspondence and reporting.

- **Link to a 'parent' program.** If you have already run a program and want to run a follow up, or are running a new program but want to re-use many of the same participants, you can link to a previously run program. This will allow you to import participants directly and to easily link results for participant reports between the programs for comparison. Note: this is only for survey-based systems such as the standard 360 or 180, not any programs where a manager is imported as well (as the manager may have changed from the previous program). This can be particularly useful when running a comparison survey, for example 6 months after an initial program, so participants are linked for reporting purposes and on initial upload.

5) Technical requirements – Administration

For administration of the program there are several technical settings to be determined before setting up the program itself.

- **Email sending permissions.** If you want the emails to come from your or your clients' email address – eg. It will say it is sent from 'surveys@yourcompany.com' - you will either need to give specific approval from that email address by clicking an 'approval' link we will send to it, or by getting your company IT to add in some technical permissions to your DNS records. The second option is more complex but is recommended as it will then allow us to send from any address on your company domain without needing specific approval for each one.
- **White listing.** Not generally required as we only send authenticated email, and our domains are protected by secure socket layer technology and adhere to best practises regarding security. However, some companies have strong policies which can, for example, block all external traffic or emails. In that case the survey domain and email domain would need to be white listed so that users within the company network can access it.

6) Technical Requirements – Users

For the survey participants and raters themselves there can occasionally be technical issues - these can be avoided by the following provisions.

- **Allow javascript in their browser.** The user portal, and also many nominations surveys or surveys with dynamic components, require javascript to function. All browsers should include this automatically however some users or IT departments can explicitly block to use of this. If this is likely to be the case we can design the survey around this, however it is an unusual case and generally using a different browser will be sufficient to get it working.
- **Allow 'cookies' in their browser.** Cookies are used to store information while the user is completing a survey or logged in to the portal – for example storing a variable to confirm that they are logged in with their user ID, or storing their entered survey results as they proceed through the survey.

- **Use a modern browser.** At least IE9 or above, and preferably Chrome or Firefox.
- **Include detailed user instructions.** If the survey has a lot of complexity (dynamically appearing or hiding questions) often the invitation email and survey introduction may specify that if the user has any problems please ensure they are on a supported browser and that javascript is enabled. Similarly, some email programs will block external links so you can include instructions to copy/paste the given survey link into a separate browser.

7) Data Privacy Considerations

If you or your client have specific data privacy requirements – such as deletion or de-identification of data after a specific amount of time, please let us know. Here are some available options we can add to help with data privacy concerns:

- **Isolated database and account.** As described in Section 4.
- **Automatic de-identification of respondent information.** Nominated respondents can have their email addresses and/or names de-identified after a certain period of time from the end of a survey round. This is a permanent change to the data and you will only be able to link responses via the CSV export performed when the reports are generated, if you enable that option.
- **Manual de-identification of participant information.** If requested, Strategic Surveys will de-identify participant information. Please note this is also a permanent change to the data and will affect the ability to re-generate reports, run follow up surveys, or generate comparison reports, unless we create a customised solution for you.
- **Automatic 'Opt-out' option added to respondent emails.** We can automatically provide the respondents a link in the footer of all emails to opt-out of the survey for the participant who nominated them, and also give them the option to completely remove all their identifying data from the system.
- **Provide administration contact details for individual requests.** At any time you can provide participants and respondents with Strategic Surveys contact information and they can request their personal data removed or accessed. Alternatively, they can contact you and you can forward the requests to us.