INTRODUCTION

Rachelle Ianniello is the HR Administrative Coordinator for HR Operations and has been at Yale for three years. Prior to joining the Yale team, she was a consultant for a management consulting firm specializing in project management, facilitation and training, retreat planning, and team building for non-profit and for-profit organizations (which included building and analyzing a lot of surveys!). One of her passions is helping others understand the functionality and possibility of new applications and software to build confidence in their skills. She has her BA in Organizational Communications from Northeastern University and her MS in Organizational Leadership from Quinnipiac University.
NORMS FOR TODAY

• Start and end on time (or early)
• Use the Chat feature to ask any questions along the way
• If I can’t answer something, I will follow up with you after the class with resources
• Take care of yourself – eat, stretch, etc.
• Be open to learning something new
• Have fun!
At what level would you rate yourself as a Qualtrics user?

- **Beginner**: I have never used Qualtrics or have only used it a couple times
- **Intermediate**: I have created enough surveys to understand the basics of creating surveys and collecting data, but would like a refresher
- **Advanced**: I use Qualtrics regularly and should probably be teaching this class!
AGENDA & GOALS FOR TODAY

• Focus on beginner and intermediate Qualtrics users who are seeking training on functionality and data collection
• Provide an overview of the Qualtrics survey tool including options for creating questions, distributing surveys, and reviewing and processing survey results
• Simultaneously facilitate hands-on walkthrough of creating a survey from start to finish with a variety of practice questions and types
• Share tips and tricks to help make creating surveys more efficient
WHY USE QUALTRICS?

• Create surveys, forms, polls, or event RSVPs
• Easily distribute and share surveys with a small team or a large population
• Encourage anonymous participation (when appropriate)
• Generate feedback that can be easily downloaded into simple reports
• Promote engagement by turning survey feedback into action
WHEN CREATING A SURVEY, CONSIDER THESE GUIDELINES:

• Shorter surveys get better response rates – **10 questions** or less is ideal.

• If you do have a longer survey, stack important questions at the top, as respondents will drop out throughout.

• Forced responses correlate with higher respondent drop out rates. **Only use the forced response function if absolutely necessary.**

• Keep **open-ended questions at the end**, as open ended questions tend to correspond with higher drop out rates.

• Consider your audience when choosing question types and answer sets. **Less is more.**

• Consider **how data will be analyzed and organized** when choosing question types and answer sets. Certain answer sets make data analysis and organization more challenging. For example, 10 open-ended questions will be a lot to ask of respondents, and a lot of work for you once you start analyzing.
1. Ensure you are signed in to your Yale Qualtrics account via It's Your Yale (search “Qualtrics Survey Tool,” then click “All Yale Results”) or by visiting yalesurvey.qualtrics.com

2. Prepare your survey questions in advance if possible either in a Word doc or an e-mail; this will save you time when creating your survey.

3. For today’s training purposes, we will focus on a survey about breakfast cereals (yum!)
HANDS-ON WALKTHROUGH

You may either follow along with my screen share as I create the survey, or also login to Qualtrics and create along with me so you can maximize your learning.

Remember, use the Chat feature in Zoom to ask any questions along the way.

Let’s go!
# REVIEW: WHAT WE LEARNED

<table>
<thead>
<tr>
<th>Qualtrics Basics</th>
<th>Qualtrics Questions &amp; Formatting</th>
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<tbody>
<tr>
<td>• New project creation</td>
<td>• 10 different question types plus survey flow and page breaks</td>
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<tr>
<td>• Project page layout and features</td>
<td>• Skip logic/conditions, automatic responses, rich text formatting, graphics, and forced response</td>
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<tr>
<td>• Survey tools, look and feel, and options</td>
<td>• Survey accessibility</td>
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<td>for customization</td>
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<tr>
<th>Qualtrics Sharing</th>
<th>Qualtrics Data Collection</th>
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<tr>
<td>• Preview &amp; publish before distributing</td>
<td>• Viewing data via Excel, Word, and PDF downloads</td>
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<td>• Survey collaboration with other users</td>
<td>• Ability to change data views and graphics</td>
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<td>• Contact list creation</td>
<td>• Downloading image only for use in presentations</td>
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<tr>
<td>• Test e-mails</td>
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<tr>
<td>• Distribution of surveys via link, e-mail,</td>
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<td>social media, or QR code</td>
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In the Zoom chat, share one tool or trick you learned today that you will apply when creating your next survey.
ADDITIONAL RESOURCES

Linkedin Learning
*survey creation

Qualtrics
Xm Community

Survey Tools and Support

Documentation and Support
Visit the Qualtrics website for on-demand webinars, including quick start guidance.
Qualtrics offers both extensive self-help resources and live support for technical questions about survey creation or application integration.
- Access the self-help resources (multi-media library with support documentation and video tutorials) by selecting the Get Help or Ask a Question options from within the Qualtrics website.
- You can also call Qualtrics support at 203-374-6662.
- For other questions, please contact your local support provider or the IT Help Desk, available 24/7/365 at 203-432-9000.

On-demand training >
Learn the Qualtrics product through our free, self-paced courses
*ID: yalesurvey / SSO
THANK YOU!

https://tinyurl.com/vILT-OESD-Survey

Please contact me anytime with questions.
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