



Checklist 18 - Surveying Your List

Project Name: _____

Date: _____

Yes No

Surveying your email list provides an opportunity for you to not only understand your subscribers/clients but to further be knowledgeable about their interests, opinions, as well as complaints regarding your products and brand. Surveying your list presents an opportunity for you to further engage with your subscribers thereby putting you in a better position to understand their pain points and effectively formulate solutions to their problems. It is worth noting however that survey methods and approaches vary with the nature of products and subscribers. To this effect therefore, while there are salient similarities in the manner of conducting surveys across industries, it is imperative to understand what approach is better suited for your brand and your clients. Here are points to consider when surveying your list.

- 1 Determine your goals and objectives for the survey.

- 2 Keep your survey questions short and straight forward.

- 3 Provide incentives for the survey to increase the participation rate.

- 4 Include a survey title and description for clarity.

Notes



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- 5 Ask questions that are relevant to your brand.

- 6 Check that the survey accentuates your brand and products.

- 7 Make your survey interesting and engaging.

- 8 Ensure your survey uses the same design and color palette of your brand.

- 9 Uphold professionalism in your survey.

- 10 Consider different surveys for your segment lists.

- 11 Use tools such as Survey Piping and Survey Logic to personalize your surveys.

Notes



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- 12 Ask your subscribers what they want.
- 13 Do some background research to better understand your subscribers.
- 14 Consider using tools such as Google Forms and Survey Monkey to set relevant questions for your survey.
- 15 Keep your survey language simple and avoid complex words.
- 16 Consider using open questions in your survey.
- 17 Limit the number of questions asked to avoid overwhelming your recipients.
- 18 Analyze data from the survey to further create segments.

Notes



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- 19 Optimize your surveys for different devices.
- 20 Connect your survey results with third-party integration CRMs such as Salesforce to gain a deeper analysis.
- 21 Test your surveys to ensure proper mapping and the functionality of merge fields.
- 22 Include a 'Thank you' page and send 'Thank you' emails to participants.

Notes