DISTRIBUTING A SURVEY WITH CUSTOM LINKS USING THE QUALTRICS MAILER
April 2020

This document shows how to build a contact list and then distribute an active (published) survey in Qualtrics to members of the list using the Qualtrics Mailer. With this method, each individual receives a custom link to the survey (automatically generated by the Mailer) in the invitation. This allows for 1) tracking of which individuals completed a survey in response to the initial invitation and 2) the delivery of follow-up invitations just to non-respondents.

When this Method is Appropriate

This method is appropriate for distributing a survey to a large number of participants after a program, in situations where knowing which individuals have (or have not) responded is needed, or for studies in which several follow-up survey invitations will be sent out to non-respondents to maximize response rate.

Start the Process

- From the main dashboard, click on the published survey you want to distribute (Post Oak Landscape and Irrigation Class Survey in this case).
- Once in the survey, click on “Distributions.”
- This brings up the main distribution menu. Click on “Emails” and then on “Compose Email” to access the Qualtrics Mailer.

Note: If you click on “Distribution” for an unpublished survey, the interface looks a little different (see right) but you would still click on “Compose Email” to access the Qualtrics Mailer.
Compose Email

- Below is the “Compose Email” interface with survey links included. Here is an overview of the interface:

**To:** use this to select or create a contact list.

**From:** There is no need to change these prefilled fields unless you are sending on behalf of someone else. That case you can change “From Name” and “Rely to Email” accordingly.

**When:** The default setting is “Send in 1 hour.” Use the pull-down to see other options.

**Message:** Add a custom message inviting participants to complete the survey. The survey link (custom for each recipient) is already included.

**Send Preview Email:** Be sure to use this to send a test email to yourself (or someone else) to ensure all is correct with the message and link before officially launching the survey to all members of the contact list.

Contact List

- **Click on** “Select Contacts” to start the process creating a contact list (interface seen here).

- Enter a name for the contact list.

- **Copy** your email list from Excel. The only required field is Email but you can also include First Name and Last Name.

- **Click on the green +** to add other fields in your Excel file that you want to include with the contact list. Typically these are known participant background variables such as gender, race/ethnicity, years of service (employee survey), etc. that are automatically attached to each respondent’s survey data record. This avoids having to ask for the information on the survey or link to another database later to gain that information.
• In this example, the contact list in Excel includes email, first name, and last name so copy all three fields from Excel. The fields need to be the same and in the order as shown below. To paste, click on the first cell under “Email.” Then right click, and select “Paste as plain text.”

Note this entire process is valid for contact list of 200 or less. For larger lists, use the Contact List option at the top right instead (shown later).

• This populates the three fields. If all looks correct, click on + Create.
• This is an example of a custom text for a survey invitation.

• This is the link to the survey provided automatically by Qualtrics.

• Alternatively, a previously used message can be loaded (and probably modified) as well by clicking on “Load Message.”
• This is an invitation to a Beef Cattle Short Course follow-up survey sent to +1,300 program participants. Note the survey invitation includes script for bringing in the first name of the invitee in salutation (i.e., Dear Richard,). Personalizing an invitation in this way can help increase response rate. Click on “insert piped text,” then “Contact Fields”, then “First Name.”

• Note the text to encourage respondents to complete the survey using a larger screen instead of a smart phone. Longer or more complex surveys that use matrix or retrospective post questions can be difficult to complete on the small screen of a smart phone.
Contact Lists Over 200

- **Click on** the Contact option (top right from main dashboard) for contact lists over 200 entries.

- **This brings up** a dialogue. **Enter a name for the new contact list.** Click “Next.”

- **To bring in** an existing list you have in another file format (the most likely scenario), **click on “Browse” as “Import from a file” is the default.**

  **Note:** If your list is an Excel file (.xlsx or .xls) then be sure to save the file to .csv format at this point. Excel format is not supported as a file type to import.

  **Point to** the .csv file containing the contact list

- **After import of the list,** Qualtrics displays a sample of the contacts for your inspection. Review to make sure the list imported correctly.

  **If correct, click on “Add Contacts.”**
• Qualtrics creates and downloads the new contact list. When the job is 100% complete, click on “View Contact List” to renew it and see if there are any duplicate email addresses.

![Jobs in progress/complete](image)

• If Qualtrics finds any duplicate emails (as seen below), it provides a list and lets you decide on a case-by-case basis whether to consolidate the duplicates (delete one of them).

![View Duplicates](image)

Once duplicates, if any, are resolved successfully, your new contact list is ready to use. **Now you can point to this new list in the survey invitation you compose (TO: field).**

• **Click on** your account name if you want to return to the listing of all your contact sets (see below).

![Paul Pope > 2020 BCSC Contact List](image)
Launching the Initial Survey Invitation

- Your contact list is set now – created through the Mailer (for 200 contacts or less) or through the Contacts menu option (for 200 or more contacts).

- Now set up all other parts of the invitation (Subject, custom salutation, custom message, when to send, etc.

  ![Compose Email](image)

  - Preview the message before sending to ensure all looks correct. Use your own email address. Note that if you have included first name in the salutation, via piped text, it will not appear in the preview.

  - If all looks good, click on the “Send” button (“Send in 1 day” in this case).

Check Responses from the Initial Invitation

- At any point after the initial survey invitation launches, you can go back to the survey, click on “Distributions” and check for the number of responses.
• Qualtrics provides raw statistics and a graphical representation of recent responses over time (example below). Using the very small sample, two of three responded after one day.

![Recent Responses Graph](image)

<table>
<thead>
<tr>
<th>All Responses</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
</table>
| Distribution Channel   | 3 | 2 | 2 | 2 | 100%
| Audience Size          |   |   |   |   |   |
| Surveys Started        |   |   |   |   |   |
| Responses              |   |   |   |   |   |
| Completion Rate        |   |   |   |   |   |
| Invite Over Email      |   |   |   |   |   |

• After the passing of a reasonable amount of time for participants to complete the survey, you can send a second invitation (reminder) to complete the survey – just to non-respondents. Click on “Emails” to schedule the reminder. Also, note summary stats to the right as well.

![Emails Interface](image)

• **Click on “Schedule Reminder.”**

• You can also schedule a “thank you” note as well without sending any reminder. Such a scenario might involve a tight time deadline to collect data coupled a high response rate to the initial invitation.
• After clicking on “Schedule Reminder,” Qualtrics present a message template identical to the initial invitation except now notice the To: field” is to “Unfinished Respondents” which includes those who haven’t started the survey and those only partially complete. The custom text should convey a message about the invitation being a reminder and a due date.

• Here is the template for the thank you note if you elect to have one in addition to the thank you respondents received when they completed the survey. Note the “To: field is to “Finished Respondents.”