

Open Text Analysis

Do you have valuable open text data from textbox, essay, or other-specify textbox responses that you're struggling to gain insights from? There are a number of good reasons for collecting open text data in your surveys. If asked in moderation, open text questions can provide you with a wealth of valuable information.

The trouble is, how do you act on it?

Open Text Analysis is a very useful tool for quantifying and transforming open text responses into actionable data. Using Open Text Analysis, you can read through responses to each open text question in your survey and bucket them into categories. This allows you to report on textboxes, essays, and other textboxes as a pie chart or bar chart!

When Would I Use Open Text Analysis?

While well-designed surveys should make careful use of the open text questions, there are still several good cases for collecting open text data. Using Open Text Analysis you will be able to act on this data and repay your respondents for their time spent providing you with this valuable information! Here are some good cases for analyzing open text data:

Example 1: Categorizing customer feedback for action

When asking customers to rate an aspect of your business, a rating alone won't give you the information you need to act and improve your customers' experience. A follow-up essay asking respondents to explain their rating can provide you with valuable and actionable information.

In Alchemer's two-question Customer Happiness Survey (which many of you have been gracious enough to respond to), we ask the below Net Promoter Score question with a follow up essay "What is the one thing that we could do to improve your experience with Alchemer?" We use open text analysis to categorize the feedback you give us to inform our continuing endeavors to improve!

5. How likely are you to recommend applying for a job at this organization to your friends, family, and acquaintances?

	0	1	2	3	4	5	6	7	8	9	10	
Not at all Likely	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	Extremely Likely

9. Please comment on the ways this organization could make the workplace a more positive environment for you as an employee.

Example 2: Categorizing "Other, specify" responses

Well-designed surveys should ensure that there is an appropriate response for each survey taker for all required questions. To ensure that surveys have a comprehensive set of options this often requires an other-specify open text field for respondents to which the list of provided options does not apply.

In the example below, customers are asked what additional features would make them more satisfied with a product. Clearly the survey designer has tried to think of all possible desired features from bells and whistles to doodads. However, to make sure that she doesn't miss out on an opportunity to gather valuable feedback from customers, she's added an "Other, specify" textbox. Using open text analysis she can categorize these responses. In doing so, she can summarize and report on them and even update her survey (if it is ongoing) with commonly requested features she didn't originally think to add to the list!

Which additional features would make you happier with our product?

- Bells
- Whistles
- Doodads
- Frills
- Thingamajigs
- Trappings
- Other, specify

Compatible Question Types

All open text fields from your surveys are available for bucketing in the Open Text Analysis tool. We have also added the File Upload question as a field available for categorization in the open text analysis tool!

- [Textbox](#)
- [Essay](#)
- [Textbox List](#)
- Questions with [other textboxes](#)
- [Textbox Grid](#)
- [File Upload](#)
- [Textbox](#) and [Essay](#) questions in [Custom Groups](#), [Contact Forms](#), and [Custom Tables](#)
- Question [Comments](#)

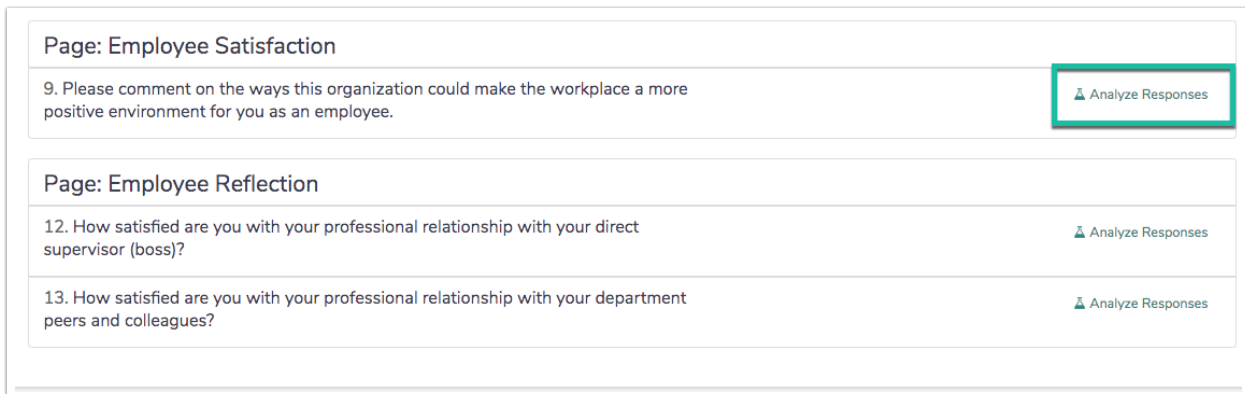
Responses must be [Complete](#) for their open text responses to appear in the analysis tool.
Piped questions will NOT work with Open Text Analysis.

Navigate Open Text Analysis

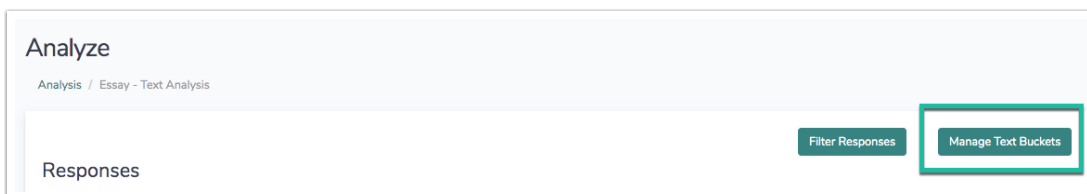
To access Open Text Analysis, open the survey you want to analyze. Go to **Results > Analyze Open Text Answers**.

Analysis Dashboard

1. You will first see a list of all the open text questions in your survey, and next to them the option to **Analyze Responses**. Click that link to begin the analysis for that question.



2. You will be asked to give the analysis a name (it pulls the question text by default) and choose between a **Multiple Select** and **Single Select** analysis.
 - **Multiple Select** will allow you to give an open text response multiple categories.
 - **Single Select** allows a single category per open text response.
3. Click **Save and Analyze** once you have made your selections. If you have not yet collected any response data, you likely will not want to start creating your analysis buckets. It is best to wait until you have response data as this will inform what buckets you need to create.
4. Once you have collected a few responses it's time to create the text 'buckets' that you will be sorting your responses into. We recommend reading through a handful of responses first to determine the first handful of buckets that you need. When you're ready, go ahead and click **Manage Text Buckets** to get started.



In our example, we created 8 buckets for the responses to our feedback survey so that we can track both positive and actionable comments on four important parts of our business (Features, Support, User Interface and Price). Many of our comments could fall into more than one of these categories, so the Multiple Select option will work best for this type of data.

Manage Text Buckets

Text Buckets

↑ Positive ✕

↑ Neutral ✕

↑ Negative ✕

New Bucket ➕ Add

Bucket Responses

1. To begin analyzing your open text responses, select the applicable bucket(s) for a response from the list along the right.
2. (Optional) Click **Manage Text Buckets** to add a new bucket. Sometimes in the middle of analyzing responses, you will realize you're missing an important category. You can add the category and then re-analyze the responses with the additional bucket in mind.
3. Once you have completed a page, make sure to click **Save Analysis & Next Page** to move along and bucket more responses! Continue on until you've analyzed all your responses.

Analyze

Analysis / Essay - Text Analysis

Filter Responses Manage Text Buckets

Responses

ID	Status	Date Submitted	Essay	Text Analysis	Customize
1	Complete Test data	2020/10/13 7:55 am		<input type="checkbox"/> Positive <input type="checkbox"/> Neutral <input type="checkbox"/> Negative	
2	Complete Test data	2020/10/17 5:31 am		<input type="checkbox"/> Positive <input type="checkbox"/> Neutral <input type="checkbox"/> Negative	
3	Complete Test data	2020/10/10 3:12 pm		<input type="checkbox"/> Positive <input type="checkbox"/> Neutral <input type="checkbox"/> Negative	
4	Complete	2020/10/13 4:36 pm			

Filter Responses for Analysis

1. If you wish to analyze only certain responses, say those with a dissatisfied score, you can click the option to **Filter Responses**.

Analyze

Analysis / Essay - Text Analysis

Responses

Filter Responses Manage Text Buckets

ID	Status	Date Submitted	Essay	Text Analysis	Customize
1	Complete Test data	2020/10/13 7:55 am		<input type="checkbox"/> Positive <input type="checkbox"/> Neutral <input type="checkbox"/> Negative	
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3	Complete Test data	2020/10/10 3:12 pm		<input type="checkbox"/> Positive <input type="checkbox"/> Neutral <input type="checkbox"/> Negative	
4	Complete	2020/10/13 4:36 pm			

This will provide you with a logic builder to filter on how other questions in the survey were answered or to filter based on the date of the response.

2. Use the *logic builder* to create your filter condition and click **Done** when you are finished.

Analyze responses matching these rules:

Remove All Logic

Q 2. Were you happy with your experie is one of the follo Yes No

+ Add Condition + Add Group

Only show responses collected between

Start Date and End Date

Example: 07/31/2014 12:15 PM or -10 days (relative to today)

Progress

You can view your the progress for each of your open text questions from the Open Text Analysis Dashboard.

Detailed progress is also available inside each Open Text Response Analysis.

Select an open text question below to analyze and categorize the responses.

Page: (untitled)	
1. Ticket #	Analyze Responses
3. How did you last contact Customer Support?	Analyze Responses
4. Who did you interact with? Each and every one of us loves feedback!	Analyze Responses
5. Any other comments? Please share! Any other comments? Please share! - Text Analysis	<div style="display: flex; align-items: center;"> <div style="width: 100px; height: 15px; background: linear-gradient(to right, #4CAF50, #ccc);"></div> <div style="margin-left: 20px;"> Edit Remove </div> </div> <p style="text-align: right;">+ Start New Analysis</p>

A response is considered analyzed when the **Save** button is used on that page of responses. Often, the analysis of open text responses is an iterative process. On your first pass through the responses, you may just be getting a sense of the information provided by your respondents. For responses that are straightforward, you can create buckets and analyze those responses. Other responses might not have a clear category at first.

To skip over a response that you would like to return to later, do not select any buckets. This will skip you over the response without marking it as analyzed, allowing you to return it later.

You can also customize your progress view while in an Open Text Response Analysis. Click the gear icon and select **Only show unanalyzed responses** to display and navigate through only responses that have not been analyzed.

Reporting and Exporting

Open Text Analysis is **not** compatible with the [Combine Results feature](#).

So you have bucketed all of your open text responses. Now what?

One of the benefits of analyzing your open text responses is the additional reporting functionality you gain! Looking at a list of open text responses can be cumbersome, particularly if you have a lot of responses. Once you've analyzed an open text question, you can run vertical or horizontal bar charts to get a summary review of your open text analysis categories.

Open Text Analysis in Reports

Open Text Analysis is automatically added to *new* [Standard Reports](#) and [Summary Reports](#). Simply create a new Standard Report, and your analyzed responses will be shown as a chart within the report (your text buckets will be converted to options within the chart).

Filter on Open Text Analysis Fields

In addition, you can use Open Text Analysis fields in [filters](#). Using Filters, you can review and share your open text response data by category. For example, we filter and share our reports of

open text response data regarding pricing and plans with our Marketing team. Open text response data regarding support and tutorials are then shared with our Support team. Responses regarding features and the user interface are shared with our Development team.

Export Open Text Analysis Fields

Open text analysis fields are available to be exported via the [CSV/Excel Export](#).

Related Articles