Sending Survey Invites and Surveying

Overview

Alchemer Survey Invite Channels gives you the power to reach people through the channels that work best for them. Send survey invites, reminders, and personalized messages via SMS, WhatsApp, Facebook Messenger, email, and more, all from within Alchemer.

And it goes beyond just reaching people. With Alchemer, you can deliver composed, personalized messages directly into the business systems your teams already use, like Salesforce, Zendesk, and Slack, so feedback flows where it can make the most impact.

How It Works

Survey Invite Channels is built around two capabilities:

- **Compose:** Alchemer lets you build dynamic, personalized messages using merge codes that pull in live data from your surveys and workflows. Write a message once and it is automatically personalized for every recipient.
- **Deliver:** Alchemer can send messages through a wide range of channels, including email, SMS, WhatsApp, Facebook Messenger, and most connected integrations. Alchemer provides native sending for email and SMS, so no additional setup is required for those channels. For other channels, you can connect your own provider account, giving you greater flexibility and control over how messages are sent.

Available Channels

Sent directly by Alchemer

- Email
- SMS

Sent using your own provider account

- Email
- SMS
- WhatsApp
- Facebook Messenger

Delivered into connected business systems

Any message you compose in Alchemer can also be delivered directly into connected platforms like Salesforce, Zendesk, Slack, and more. See the full list of supported integrations below.

> **Requirements and things to know**
>
> - Survey Invite Channels requires Alchemer Collect and Connect.
> - Native SMS sending requires an SMS bundle.

- WhatsApp and Facebook Messenger require a connected provider account.
- Respondents click through to the survey to respond; they do not reply within WhatsApp, Slack, or other channels.
- Setup varies by channel and use case, and not every messaging system is supported. Check the supported integrations below.

Common Use Cases

Boost survey response rates with the right channel

Send survey invitations and reminders through the channels where your customers are most responsive. SMS, WhatsApp, and Facebook Messenger offer high open rates and feel natural to recipients. With Alchemer, you can automate multi-channel sequences that follow up with respondents automatically.

Close the loop inside your support platform

After a support ticket is resolved, Alchemer can automatically add a personalized message to the Zendesk ticket inviting the customer to share their feedback. Your support agents see it too, keeping everyone informed without any additional steps.

Put feedback data where your sales team can act on it

When a prospect completes a survey, Alchemer can compose a personalized summary of their responses and add it directly as a note on their Salesforce record, giving your sales rep the context they need before their next conversation, without leaving their CRM.

Orchestrate campaigns across multiple channels

Use your existing provider account to run a survey campaign across email, SMS, and WhatsApp, all composed and triggered from a single Alchemer workflow, with every message personalized using merge codes.

Integration-Based Delivery

One of the most powerful aspects of Survey Invite Channels is the ability to deliver composed messages directly into the business systems your teams already work in every day.

Because Alchemer messages are built with merge codes and live survey or workflow data, they can be routed to any connected system that accepts text. Your feedback data flows into the context where it is most actionable, whether that is a CRM record, a support ticket, or a team chat channel.

- **For sales and revenue teams:** Salesforce, HubSpot, Microsoft Dynamics 365, Zoho CRM, SugarCRM
- **For customer support teams:** Zendesk, ServiceNow, Gladly, Gorgias, Kustomer
- **For internal teams:** Slack, Microsoft Teams, Asana, Microsoft Office 365

Supported Integrations

CRM & Sales

Integration	Message Delivery Example
Salesforce	Add a note to a lead, contact, opportunity, or account
HubSpot	Add a note to a contact, deal, or company record
Microsoft Dynamics 365	Update a contact or opportunity with survey data
Zoho CRM	Post a note or update to a contact or deal
SugarCRM	Add a note or activity to a contact or account

Customer Support & Service

Integration	Message Delivery Example
Zendesk	Add a comment to a ticket (visible to agent or customer)
ServiceNow	Post an update to an incident, request, or case
Gladly	Add a conversation note to a customer record
Gorgias	Add a note or message to a support ticket
Kustomer	Post a note to a customer conversation

Internal Communication & Collaboration

Integration	Message Delivery Example
Slack	Send a composed message to a channel or user
Microsoft Teams	Post a message to a channel or chat
Asana	Add a comment or task note based on survey results
Microsoft Office 365	Send a message or update via Office 365

Extensible / Custom

Integration	Message Delivery Example
Twilio	Send SMS or WhatsApp messages using your own Twilio account
Custom Webhooks	Deliver composed messages to any system that accepts a webhook

Configuring Survey Invite and Survey Steps

The rest of this article covers how to add and configure the Survey Invite step and the Survey step within an Alchemer Workflow.

Survey Invite Step

The Survey Invite step of a workflow is how surveys are delivered to respondents. The Survey Invite step functions like a typical email campaign within Alchemer and has similar customization and functionality.

Survey Invite Requirements

- A Survey Invite step must precede a Survey step.
- The "from address" should match the "reply to" address to ensure deliverability.
- You can can only send to one person at a time (add multiple invite steps to send to multiple people)

Follow these steps to add and edit a Survey Invite step:

1. Select "Survey Invite" from the Steps list on the right side of the screen. Drag it over to your workflow timeline.

2. Click on the pencil icon to edit the Survey Invite step. Complete all of the fields ensuring you meet all email requirements.

3. You can customize the link text by double clicking on the link.

Survey Step

The Survey Step is where you select surveys to include in a workflow. You can select any existing survey that you have access to or build a new survey for a specific workflow.

Surveys connected to workflows will have a workflow icon and will tell you how many workflows are connected at the top of the survey.

Remember, editing a live survey in a workflow has the same effect as it does when editing a live survey today.

Survey Step Requirements

- The Survey Step must be connected to a new or existing survey.
- Survey Step must proceed a Survey Invite Step.
- If you send the "edit link" to a survey, it will be treated as new run of the workflow.

Follow these steps to add and edit a Survey Step:

1. Select "Survey" from the Step List on the right side of the screen. Drag it over to your workflow timeline.

2. Click on the pencil icon to select a new or existing Survey.

3. Hit the "Save" button

When building a new survey within the workflow builder, you will have access to global merge codes inside the survey. These can be connected to data from the workflow. If you take that new survey out of the context of the workflow, merge codes will be blank as it is not collecting that data.

Workflows that use surveys with encrypted data will display that data in merge codes throughout the workflow. Anyone interacting with the workflow will be able to see the data displayed in a merge code.

Continue Workflow Immediately or Wait for Survey Response

By default, the workflow will wait for a complete survey response before continuing onto the next workflow step.

When configuring a Survey Step you can decide if you'd like the workflow to "Wait for survey response" or "Continue immediately". After selecting a survey, while configuring your Survey Step, scroll down to below the survey selector and choose your desired option.

Wait for survey response: The workflow will pause at the survey step until the respondent completes the survey.

Continue immediately: The workflow will continue to the next step without waiting for the respondent to complete the survey.

When using "Continue immediately", Alchemer Workflow users will typically add a Delay Step after the survey step and then use an If/Else logic step to check the survey status before continuing the workflow

Learn more about using If/Else Logic based on survey status.

What are some example use cases for using the "Continuing immediately" functionality:

- You are using Alchemer Workflow to send out several surveys over a period of time (ex: 30/60/90 day onboarding surveys) and want all survey invites to be sent at specified dates, even if a customer/employee doesn't fill out one of the preceding surveys.
- Each survey in your workflow has a specific close date and you don't want survey recipients to stop progressing through all surveys in the workflow if they don't complete one survey before the close date.

Related Articles