

Leading Practices: Pre-Launch Checklist

Are you ready to launch your survey and start collecting responses? Excellent! We have prepared a checklist to help you make sure that you have crossed your t's and dotted your i's (both literally and figuratively) before you get your survey into your respondents' hands.

This is not a Comprehensive list or a One-Size-Fits-All but rather a list of some things that you may not have considered before launching your survey.

☐ Are You Using the Right Question Type?

Certain question types carry very specific functionality. For example, a [Radio Button Question](#) allows a single answer whereas a [Checkbox Question](#) allows multiple answers.

Using the wrong question type to ask a question can make your data unusable. You want to avoid this scenario:

1. Do you use our software regularly?

☒ yes

☒ no

☐ Check Your Reporting Values

Reporting values are typically used to "code" your answer options for reporting/exporting purposes. Learn more [here](#) . If you have customized your reporting values, we highly recommend double-checking these for any errors as this can cause some confusion when looking at reports and exports.

Our suggestion is to submit a few live responses to your survey (take your survey as if you were one of your respondents) and create a [Standard Report](#) and a [CSV/Excel Export](#) to take a peak at how your data is presented. This will help you identify any reporting values that may need updating.

☐ Check Special Settings

Do you use questions with **N/A, all of the above**, or **none of the above**? If so, you will want to make sure that you have applied special settings to these options so that they behave differently than the normal answer options in your questions.

Learn more in our Answer Options Special Settings Tutorial [Answer Option Special Settings: Not Applicable, None/All of the Above](#) .

☐ Test Your Logic Conditions

Are you using [question](#) or [page](#) logic to trigger certain questions/pages in your survey based on answers to earlier questions? If so, we suggest that you take the survey and try different answer combinations to make sure that survey items are triggering as desired.

If you stumble upon any logic that needs to be adjusted, you can make the necessary changes.

☐ Do You Need to Identify Your Respondents?

SurveyGizmo does not automatically collect respondent identifying data aside from some general [geodata](#) . This means that if you want to know who took your survey, you will need to use one of several available features to accomplish this.

Learn more in our [Identify Respondent Info Tutorial](#) .

☐ Use the Appropriate Save and Continue Option

Are you using the [Save and Continue](#) feature in your survey? If so, you may also consider including instructions for your survey respondents on how to take advantage of the Save and Continue feature to increase your survey response rate.

☐ Use the Correct Email Campaign Link

Note: If you are not using an email campaign to distribute your survey, this will not apply to you.

When you create an [Email Campaign](#) and add your contacts, SurveyGizmo automatically assigns a unique link to each contact and merges this into your message via the `[invite("survey link")]` merge code. By default, the `[invite("survey link")]` merge code will be hidden behind "[Begin](#)" in an html email message, though you have the option to customize this link text. Learn more [here](#).

As a result there is no need to paste a link to your survey into your email campaign message.

We recommend [testing your email campaign](#) before you launch to your audience. This will allow you to take a look at the appearance of your email message and the appearance and functionality of your survey link.

☐ Check Your Data

Test! Test! Test! We strongly recommend that you test your survey before launch. Learn about the testing tools in our [Test Your Survey Tutorial](#).

- Take a few minutes and take your survey as if you were a respondent. Submit a few responses answering your survey differently each time.
- Invite colleagues, friends, or family to test. Often it helps to get a second set of eyes to review your work and alert you to things that you may not have thought of.
- Create a [Standard Report](#) and a [CSV/Excel Export](#) to get a preview of what you can expect when live responses start to accumulate.

Submitting responses and creating Reports and Exports prior to launch is a great practice. It will allow you to see how your survey questions will be reported on, as well as how the questions and answers look in an export.

☐ After Launch

In a perfect world your survey would not require changes after launch. But we

understand that things come up and sometimes you need to edit a live survey. Please take a look at our [Editing a Live Survey Tutorial](#) for some best practices in case you have to go down this road.

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