

Getting Started with Dynamic Surveys

You might be wondering what exactly is a *Dynamic Survey*? When we refer to dynamic surveys, we are talking about any survey that changes based on the respondent and/or the answers they provide while taking the survey.

Dynamic surveys can take on many forms. They can be anything from showing a follow-up question based on a specific answer to a prior question, to including information that you already know about the respondent in the survey.

Why should your surveys/forms be dynamic?

Dynamic surveys reduce survey fatigue. When your survey is dynamic, respondents only answer questions that are relevant to them and they are not asked to provide information that you might already know about them. This also shows your respondents that you respect their time.


When your survey is dynamic, you get better data. For example, if you are showing certain questions to only respondents that answer a prior question in a specific way, you are getting data from only the respondents that are qualified to answer the question.

How can I create a dynamic survey?

SurveyGizmo provides access to a number of features that can help you make your survey dynamic. We will introduce these features below.

Logic

Logic allows you to dynamically display/trigger questions or actions to survey respondents based on information that you gather directly on the survey or information that you already know about your respondents. You can think of logic in terms of: *if x is true, then show y*.



It is important to note that not all question types are compatible with logic!

SurveyGizmo offers several varieties of logic:

- Answer Option Logic
- Question Logic (including grid rows)
- Page Logic.

Answer Option Logic

Using Answer Option Logic, you can conditionally show answer options in compatible questions based on the rule(s) that you configure. For example, you might want to remove the sign-up date for a course once the date has passed.

Visit the [Answer Option Logic tutorial](#) for set-up instructions and to review compatible questions.

Question Logic

Question Logic allows you to create a rule to conditionally show an entire question in your survey. Most often, this rule is based on an answer from a prior question on your survey, but it can also be based on [URL variables](#) , Email Campaign [contact data](#) , and location data, to name a few.

For example, let's say that you are running an employee engagement survey and you have different questions for each department. If you don't use logic, all of your questions will be shown to all of the employees. This could lead to gathering bad data and is likely not the best use of your employees' time.

Instead, consider asking the employee to identify their department and use logic to only show them questions relevant to that department!

See Question Logic in action in our [sample survey](#) . Answer the first question with "Yes" and see a follow-up question appear. Note that the "No" answer does not trigger the follow-up.

Visit the [Question Logic tutorial](#) for set-up instructions and to review the compatible

questions. Are you working with grid questions? Learn how to [apply logic to grid rows](#) .

Page Logic

Page Logic expands on question logic in that it allows you to trigger an [entire survey page](#) . This includes all of the questions and actions on that page.

Using our above employee engagement example, rather than applying a separate but identical logic rule to each question that needs to be shown to the Marketing team (for example), you can group all of the Marketing questions on one survey page and then apply a single Page Logic condition to trigger all of the related questions together.

Page Logic allows you to apply logic conditions more efficiently. This saves time and decreases the potential for error, such as forgetting to add a logic condition to one of the related questions.

Visit the [Page Logic tutorial](#) for set-up instructions and to review compatible questions.

Skip or Disqualify

Skip/Disqualify Logic works a little bit differently than all other logic in SurveyGizmo.

- With Question and Page Logic you are setting up the rules for which a question or page shows.
- *Skip Logic* interrupts the default survey flow and directs the respondent to another location.

You can accomplish the following things with Skip/Disqualify Logic:

- skip respondents to a later page in the survey
- skip respondents to an earlier page in the survey
- disqualify respondents
- redirect respondents to an external website
- flag the response as complete

Skip Logic is a great alternative for creating dynamic surveys. Even though you can

often accomplish the same objective with Page Logic, Skip Logic can allow you to do so much more efficiently.

For example, let's say you have a 10 page employee feedback survey. On page 1, you ask employees to select their department. While most of the survey will be seen by all employees, the HR Department only needs to see page 19 (and not the other pages). While you could set up page logic on pages 2-18 to make sure that they show to all other departments only, the more efficient alternative is to set up Skip Logic to have the HR Department skip over pages 2-18 and go directly to page 19.

Visit the [Skip Logic tutorial](#) for set-up instructions and compatibility notes.

Skip Logic also allows you to disqualify respondents. This can also help you create a dynamic survey because it allows you to make sure that you are gathering data from only qualified respondents, and make sure that you are not wasting time for those who are not qualified.

Learn how to configure Disqualify Logic by visiting our [tutorial](#).

Piping & Repeating

Just like Logic, Piping allows you to use data provided by your survey respondents to customize and personalize their ongoing survey experience. Here are just a couple of examples of things that you can do with piping/repeating:

- Ask for the respondent's name via a question and use the name they provide to personalize the text of the thank you message that shows on the last survey page.
- Ask the respondent to identify which of your products they have used and dynamically repeat follow-up questions for each of the selected products.

Piping comes in many varieties in SurveyGizmo, including:

- Simple Piping (using merge codes)

- Answer Option Piping
- Question Piping/Repeating
- Page Piping/Repeating

Simple Piping

Using simple piping, a.k.a [merge codes](#) , you can display a single answer from a previous question on a *later survey page*. This is typically used in the question title or in a [text/instruction element](#) .

For example, you might ask for the respondent's name and later use their name to personalize a thank you message at the end of the survey.

See this feature in action in our [sample survey](#) . Answer question 1 and see your answer *pip*ed into the text of question 2 on the following page.

Visit the [Simple Piping tutorial](#) for compatible questions and set-up instructions.

Answer Option Piping

Using option piping you can use the answer(s) (either those that were selected or left unselected) from a previous question as the answer options in a question on a later page.

For example, you might ask your respondents to identify brands that they are familiar with and then ask a follow up question about which of those brands they have used, purchased, etc.

See this feature in action in our [sample survey](#) . Answer question 1 and see your selected answers *pip*ed into question 2 on the next page.

Explore the Answer [Option Piping tutorial](#) for set-up instructions and to review compatible questions. If you need to pipe *unselected* answers, visit the [Pipe Unselected Answers tutorial](#) .

Question Repeating

Question Repeating allows you to repeat a question based on answer options selected (or not selected) from a question on a previous page.

For example, if you are asking respondents about brands that they are familiar with, you may want to ask the same follow-up question(s) for each selected brand. Create the follow up question(s) that you need and set up Question Repeating to repeat these questions for each selected brand.

See Question Repeating in action in our [sample survey](#) . Answer question 1 and you will notice that on the following page, the follow-up question will be dynamically repeated for each of the brands selected in question 1.

Visit our [Question Repeating tutorial](#) for set-up instructions and to review compatible questions.

Page Repeating

Page Repeating allows you to repeat entire survey pages based on answers provided in a previous survey question.

For example, if you are asking respondents about brands that they are familiar with, you may want to ask the same group of follow-up question(s) for each selected brand. You can create a page with all of the follow up questions that you need and then setup Page Repeating to repeat this page for each of the selected brands.

See Page Repeating in action in our [sample survey](#) . Answer question 1 and you will notice that the following page will be repeated dynamically for each of the brands that you selected.

Visit the [Page Repeating tutorial](#) for set-up instructions and to review compatible questions.

Piping/Repeating Considerations and Alternatives

Before you dive in and start setting up piping within your survey, there are several things that you may want to consider. In some cases, piping may not be an ideal

solution and alternatives are available.

Visit our [Piping Best Practices content](#) for piping considerations, best practices, and potential alternatives.

Add Questions as Needed

Sometimes you don't know ahead of time the amount of information that a respondent may need to provide. In this case, it can be helpful to allow your respondents to dynamically add a question (or set of questions) in order to provide you with more information.

Using SurveyGizmo's Add as Needed feature you can allow your respondents to answer a given set of questions repeatedly.

For example, let's say that you have created an event sign-up form. Respondents can provide contact information for additional attendees but you don't know how many attendees each respondent might add. Using Add as Needed, you can allow the respondent to dynamically add a set of contact fields for each attendee.

This feature is available for the following question types:

- [Custom Group](#)
- [Contact Form](#)

See *Add as Needed* in action in our [sample survey](#) . Click the **Add Another Attendee** button to create additional iterations of the questions.

Visit the [Add as Needed tutorial](#) for set-up instructions and compatibility notes.

Using Links to Create Dynamic Surveys

Survey links can also help you customize the survey experience for your respondents in a number of ways.

URL Variables

One common method for customizing your survey via link is to append URL variables to the link. URL variables allow you to [pass information into your survey](#) via the link. This URL information can then be used in your [logic conditions](#) or to [populate content in your survey](#).

For example, let's say that you are a regional manager for a chain of retail stores. You could send your Colorado store the following link:

```
yoursurveylink.com?location=CO
```

Note the `?location=CO` URL variable in the above example. This variable can be used in logic conditions to trigger questions that are only relevant to the Colorado location. You can also populate the CO value into the survey via a merge code.

Visit our tutorials to learn more about using URL variables to create dynamic surveys:

- [Using URL Variables in Your Survey](#)
- [Using URL Variables in Logic Conditions](#)
- [Using URL Variables to Pass Data](#)

Survey Themes

Creating [multiple tracking links](#) for your survey provides you with flexibility in terms of your survey's look & feel. Each tracking link can have a unique survey theme!

For example, perhaps you send the same survey to each school in a given school district. Each school has its own unique mascot and colors. You can create a separate link for each school, and in turn [create a unique theme that can be associated with each unique link](#).

Now, you can send a personalized survey to each school, without having to create a separate survey to do so.

Email Campaigns

A SurveyGizmo [Email Campaign](#) allows you to quickly send out your survey to a list of contacts via an email configured within SurveyGizmo.

When you upload your contact list into a SurveyGizmo Email Campaign, you have the option of associating additional information with your contacts (First Name, Last Name, Department, etc.). This information is mapped to [contact fields](#) that you can later reference to pass information into your survey or to trigger logic conditions.

Having additional information associated with your contacts allows you to make their survey taking experience more personal. For example:

- You can [greet your respondents by name](#) as they begin the survey.
- Ask your respondents to confirm or update the contact information that you already have on file.
- Use information associated with your contacts in [logic conditions](#) to trigger relevant questions and/or content.

Next Steps

You will notice that part of making your survey dynamic is incorporating information that you already know about your respondents, into the survey. In SurveyGizmo, we refer to this process as *Pre-population*. We introduced a couple of the most popular pre-population methods above: URL Variables and Email Campaigns.

There are a number of other options for pre-populating information into your survey. Explore these options by visiting the [Guide to Pre-Population tutorial](#) .

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