

iSupport[®] Training Course

CONFIGURING SURVEYS

DESCRIPTION:

Surveys are a tremendous way of communicating with customers and garnering feedback. This course will show you how to create, distribute, view, and report on surveys. This course typically runs up to one hour.

TOPICS COVERED:

- Scenarios for Using Surveys
- Methods of Generating Surveys
- Setting Up Category-Based and Interval-Based Distribution
- Setting Up the Survey Distribution Email
- Defining Survey Questions
- Sending Surveys From the iSupport Desktop and Incident and Customer Profile Screens and Group Views
- Viewing Survey Responses on the iSupport Desktop
- Setting Permissions
- Viewing and Reporting on Survey Information
- Q&A as Needed

COST: \$200 per seat
LOCATION: Online
SCHEDULE: 2-5 days in advance

CONFIGURING SURVEYS

AGENDA:

Scenarios for Using Surveys

- Identifying surveys for your environment

Methods of Generating Surveys

- Sending surveys via the Incident or Customer Profile screen
- Sending surveys via the iSupport Desktop
- Sending surveys automatically on a scheduled interval

Defining Survey Questions

- Entering questions, requiring responses, including images

Setting Up Category-Based and Interval-Based Distribution

- Identifying categories for survey distribution
- Specifying survey intervals

Setting Up the Survey Distribution Email

- Entering the message, including iSupport data values

Sending Surveys From the iSupport Desktop and Incident and Customer Profile Screens

- Scheduling the Survey agent
- Sending and completing surveys
- Viewing survey responses on the iSupport Desktop

Setting Permissions

- Assigning permissions to support representatives and support representative groups

Viewing and Reporting on Survey Information

- Viewing survey requests and responses
- Creating SQL Reports

Q & A as Needed