Zoho Survey

Training Agenda

About

Zoho Survey is an online survey tool with an easy-to-use interface. This training course will help you turn your ideas into questions and design your own unique surveys. You will learn how to add questions, customize your survey with design tools, integrate Survey with other Zoho apps and third-party apps, share your survey and collect responses, and analyze survey results to help you make better business decisions.

Who it is for:

This course will be useful for anyone who wants to create online surveys with Zoho Survey. However, the Portal and Department Setup module is only relevant to administrators.

2 day course: Day 1: 3 hrs

Basics + Advanced features

Module 1: Introduction

- Introduction to surveys
- Survey use cases by industry
- Product blueprint

Module 2: Survey creation

- Creating surveys from scratch

- Creating surveys from templates and existing surveys

- Piping and personalizing surveys

- Applying themes

- Applying logic

Module 3: Advanced options

- Setting up trigger functions and trigger emails

- Adding scores to weigh responses

- Using custom variables and other advanced options (translate, transfer, export, etc.)

- Purchasing responses or research panels

- Preventing multiple responses

Module 4: Survey distribution

- Publishing online and offline surveys

- Distributing surveys over email

- Sending inline emails

- Embedding surveys and pop-up surveys

- Securing your surveys

Module 5: Reporting

- Analyzing the summary of responses

- Analyzing individual responses

- Customizing reports (filters, custom reports, cross tab reports, trend reports, text analysis, and sentiment analysis)

- Scheduling reports and other advanced options (sharing, exporting, and downloading reports)

Day 2: 3 hrs

Module 6: Integrations and 3rd party set ups

- Setting up CRM integration

- Distributing surveys using Zoho Campaigns

- Setting up other integrations (Zoho Analytics, Shopify, Zendesk, and Eventbrite)

- Integrating Zoho Survey in Slack

- Triggering webhooks

Module 7: Portal and department setup

- Managing portals and departments

- Adding users to portals and departments

- Setting up and managing a custom domain

- Tracking activities using audit logs