Distributing a Qualtrics Survey by Email

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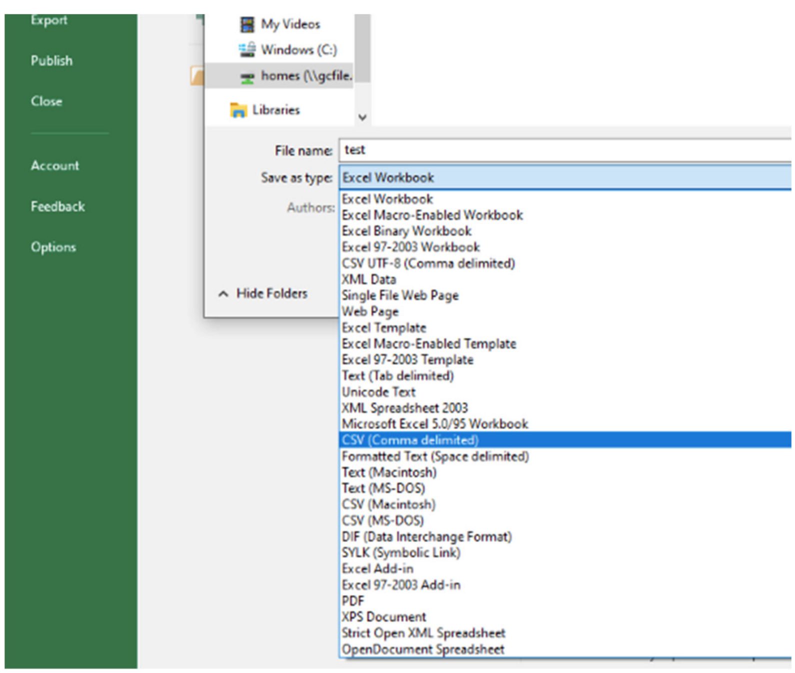
When you're ready to distribute your survey to participants, you have a couple options. Most of the time, you'll want to use an email distribution. This allows you to send your survey to a specific group of people, allow each person to take the survey only one time, and send reminders to your participants. This document shows you how to set up an email distribution.

The first step is to obtain a list of emails. You'll need to create an Excel file that contains at least the participants' name and email. You can also include any demographic information that you want in your final dataset. You should have a header row with titles for each column. The email column must be called "Email." The rest of the columns can be named whatever you like. Here's what a contact spreadsheet might look like:

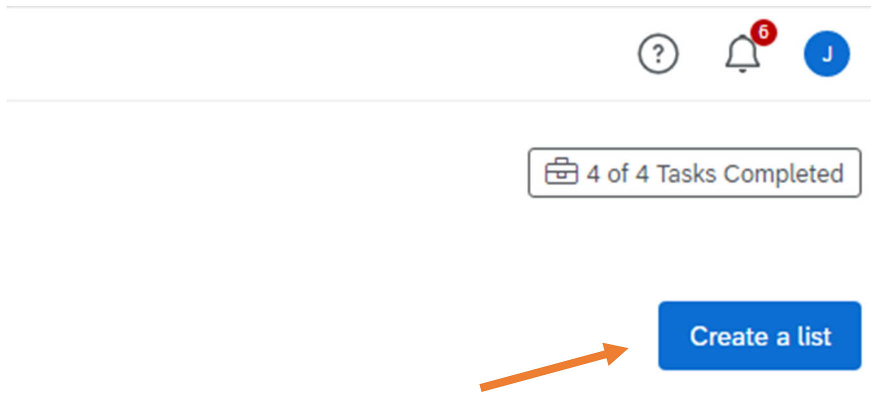
	A	B	C	D	E	F	G
1	FirstName	LastName	email	gender	city	state	country
2	John	Smith	fake1@goshen.edu	M	Joliet	IL	US
3	Ana	Bontrager	fake2@goshen.edu	F	Goshen	IN	US
4	Taylor	Martinez	fake3@goshen.edu	F	New Paris	IN	US
5	Naomi	Miller	fake4@goshen.edu	F	Elkhart	IN	US
6	James	Brown	fake5@goshen.edu	M	Mishawaka	IN	US

It's a good idea to check over your list to make sure you don't see any duplicates or obvious errors. Qualtrics will also alert you to duplicate and bounced email addresses after you send the email.

Important: Do a "Save As" and choose "CSV (Comma delimited)" file. Qualtrics will only allow you to upload csv files, not xls/xlsx files.

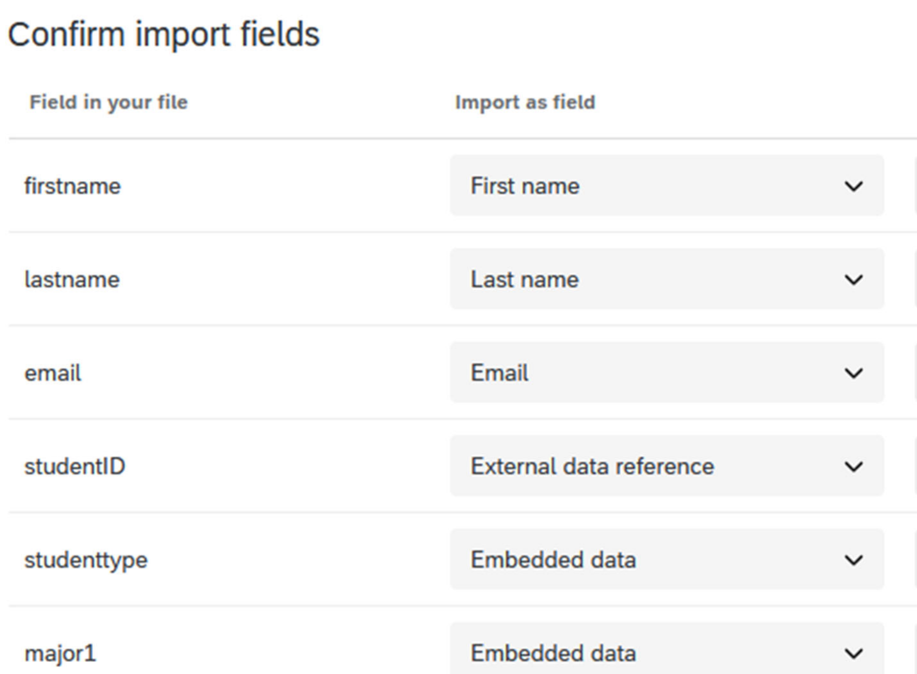


Once you have a csv file ready, log in to your Qualtrics account and go to the "Directories" menu by clicking on the menu at the top left of your screen. Go to the "Lists" sub-menu, and click the button at top right, "Create a list."



Give your contact list a name and then follow the instructions to upload your csv file.

If the file is formatted correctly, you'll be able to move to a screen called "Confirm import fields." Make sure that the email field is imported as "Email." You might also choose to label a column "First name" if you want to include the participants' names in the greeting of your invitation emails. ID numbers may be tagged as "External data reference." All other data in your file can be labelled "Embedded data."



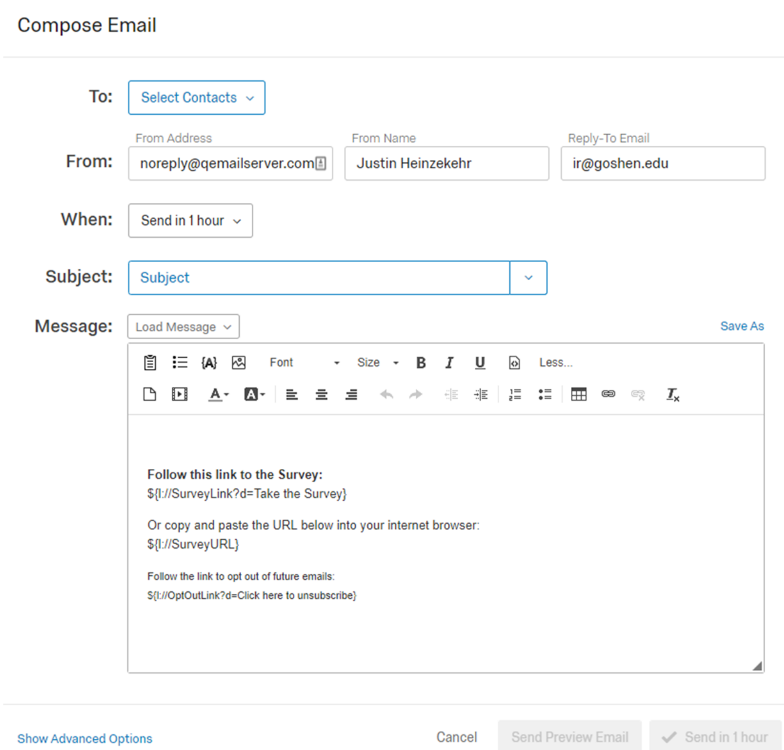
Click "Upload the file."

The upload process may take a few minutes. Once it is completed, it is a good idea to review your contact list. Make sure the number of contacts is what you expected, and check one or two of the contacts to make sure that the fields come in like you expect.

Once you have successfully uploaded your contacts, you're ready to add the contact list to an email distribution.

Go back to the "Projects" menu to find your survey project. After clicking on your survey, go to the "Distributions" option in the top menu. It will ask you what kind of distribution you want to use. In most cases, the email method is preferable. An anonymous link would be appropriate for questionnaires that will be posted on a website or through social media, but this does not allow you to see who responded. Emailing allows you to target and track your participants, as well as send reminders to those who haven't responded.

Hit "Compose Email" to begin, and you'll see a form that walks you through the process.

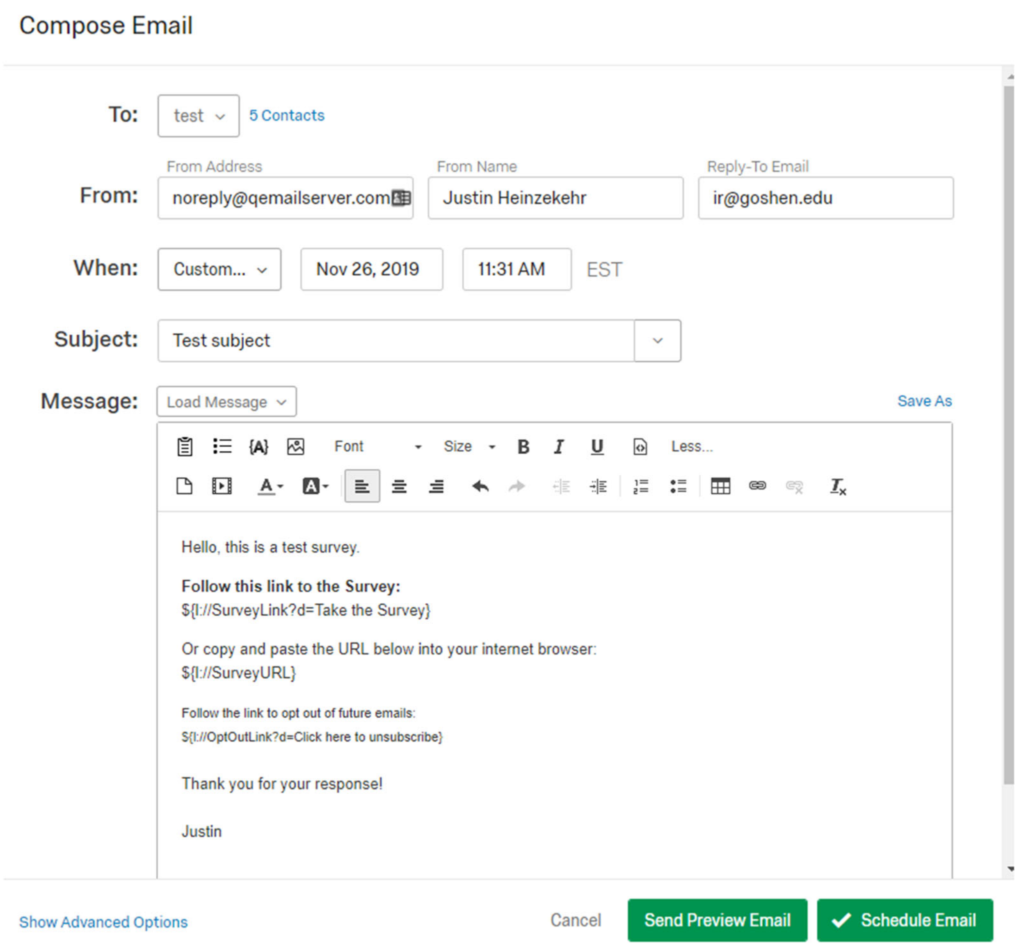


The "Select Contacts" button will allow you to search for the contact list that you uploaded to your library. Most of the time, you will want to "Select the Entire Contact List." Qualtrics gives you another opportunity here to make sure you have the number of contacts you expect.

Do not change the "From Address." You can change the "From Name" and "Reply-To Email" to whatever makes most sense for your project. Usually this should be the lead researcher's email, or whoever will be responsible for responding to any participants that might have problems or questions.

I would recommend using the "Custom" option to set a time for the survey to go out. It's a good idea to schedule it at least an hour or two from now in case you realize that you need to change something in the survey or in the email.

When you write the message, Qualtrics has already populated the link to the survey and the opt out link. Both of these pieces are required to be in the email. Qualtrics will not allow you to send the email without them. You should write your own introduction and conclusion around the links that Qualtrics has given you. If you think you might use this same email for other projects, you can save the message to your library.



When your email is ready, send yourself a preview email by clicking on the green button at the bottom. This is an important step that allows you to review the email as well as the survey. Read carefully over the email, and go through the survey once yourself to make sure that it works like you hoped.

When you are absolutely sure that there are no errors, hit the "Schedule Email" button. The survey will be distributed at the time you listed!

You should see a screen that shows your scheduled email.

By choosing "Schedule Reminder," you can add email reminders that will automatically be sent to any contacts who haven't already responded. The reminder email uses a form very similar to the main email form. Make sure your reminder is scheduled to arrive *after* the original survey.

Depending on the survey, schedule 1-3 reminder emails. For shorter, more informal surveys, 1-2 reminders are usually sufficient. Don't send more than 3 reminders; it is rare that someone who has not responded to a third reminder will respond because of a fourth reminder. It's best to space reminder emails out at least a few days apart.

I generally add a word of thanks at the end of the survey itself rather than sending a separate thank you email. That cuts down on the total number of emails sent to participants. In that case, you can ignore the "Schedule Thank You" option.

Your final screen should look something like this:

Now you're ready to sit back and watch the results come in!