

# CLICKDIMENSIONS PARTNER TRAINING

Forms vs. Surveys



# TODAY'S AGENDA

- Forms (3 different “approaches”)
  - ClickDimensions Forms
  - Profile Management Forms
  - Form Capture
- Surveys
- Similarities between Forms & Surveys
- Key differences between Forms & Surveys
- Best applications for each web content type
- Q&A



# CLICKDIMENSIONS FORMS

- Use the ClickDimensions Form Builder to quickly & easily create & post web forms
- Great for **identifying** new Leads/Contacts from anonymous visitors
- Embed on Landing Pages, web pages, or link within Email Templates
- ClickDimensions queries CRM upon submission, we need an **email address** to make the connection between the Posted Form and Lead/Contact records in CRM
  - ClickDimensions creates a new Lead/Contact when no match is found in CRM
- **Maps** data from the values submitted in the Posted Form to the Lead/Contact record in CRM
  - i.e. Our customer, Bob, does not have an address listed on his Contact record. Bob submits a ClickDimensions Form with his address, his Contact record will now have values in the Address fields.
- Reporting: Posted Form records, Posted Field records, Posted Form Report.
- Use this data in Dashboards or Personal Views, etc.!



# CLICKDIMENSIONS PROFILE MANAGEMENT FORMS

- Use the ClickDimensions Form Builder, but add global profile management fields
- These forms are designed for fields to prepopulate with Lead/Contact field values when accessed from a direct link in a ClickDimensions email.
- Great way for customers to **update** their own info (i.e. name change, update address) or submit **new** information
  - i.e. Bob moves to a new address. He fills out a ClickDimensions Form with the new address, and the address field on his Contact record now reflects that updated address data.
- Link directly to the form within the email template's link manager (Web Content tab)



# FORM CAPTURE FORMS

- Forms **created outside of the ClickDimensions Form Builder**, then use HTML to push submission data into CRM, this **data will map** to Lead/Contact records, and also identify anonymous visitors
- Some rules apply: must have the ClickDimensions Tracking Script, Form Action URL, etc.
- Once a Form Capture is set up, it essentially works the same as a ClickDimensions Form
- Re-create the ClickDimensions Actions with CRM Workflows

```
<form id="contact-form" action="http://analytics.clickdimensions.com/forms/h/aXLip1cMTMUiDZdQniTxj3" method="post"
enctype="multipart/form-data">
  <fieldset>
    <label><span class="text-form">First Name:*</span><input name="first_name" id="first_name" type="text" /></label>
    <label><span class="text-form">Last Name:*</span><input name="last_name" id="last_name" type="text" /></label>
    <label><span class="text-form">Email:*</span><input name="email" id="email" type="text" /></label>
    <label><span class="text-form">Industry:</span><select name="industry" id="industry">
    <option>--Select an Industry--</option>
    <option>Fellow Farmer</option>
    <option>Restaurant</option>
    <option>Grocery</option>
    <option>Farmers Markets</option>
    </select></label>
```



# CLICKDIMENSIONS SURVEYS

- Use the ClickDimensions Survey Builder to quickly & easily create & publish Surveys
- Designed to **receive feedback** from customers
- Use skip logic to filter Survey Questions for the customer to see, depending on previous answers
- Embed on Landing Pages, web pages, or link within Email Templates
- **Associates** data from the values submitted in the Posted Survey with the Lead/Contact record in CRM
  - i.e. We can see that Bob submitted the survey and how he answered the questions
- Reporting: Posted Survey records, Survey Answer records, Survey Report
  - Use this data in Dashboards or Personal Views, etc.!



# FORMS & SURVEYS: SIMILARITIES

- Require a Domain record + Web Content CNAME set up within DNS Host AND CRM!
- Building blocks (i.e. Form Fields for Forms; Survey Questions for Surveys)
- Need an email address with the submission in order to associate the incoming data with the correct Lead or Contact within CRM
  - Will create a new Lead or Contact if no existing record is found with matching email
- Builders look very similar (drag and drop, 3-column layout, Code Editor, Preview, etc.)
- Same embed options, can also be linked to directly within Email Template link manager
- Recorded data in CRM uses similar hierarchy (i.e. global view, personal views, Campaign associations, Lead/Contact record associations, etc.)
- Data can be used with CRM functionality (i.e. Workflows, Personal Views, Dynamic Marketing List queries, Advanced Find, etc.)



# FORMS & SURVEYS: KEY DIFFERENCES

## FORMS

- Map data directly from Posted Forms/Posted Fields to Lead/Contact records
- Add participants to Campaign Automation
- Can map to lookup fields
- Can prepopulate fields when accessed from a link in an Email Template

## SURVEYS

- Associate data from Posted Survey/Survey Answers with Lead/Contact records
- Cannot yet add participants to Campaign Automation (*coming soon!*)
- Can use skip logic to filter survey path
- Survey Report is visual, shows quantitative data in the form of bar charts





# BEST APPLICATIONS FOR EACH

## FORMS

- Identify anonymous visitors
- Update customer info.
- Collect additional info.
- Prepopulate field values
- Add an opt-in box for emails
- Mapping data
- Add participants to Campaign Automations

## SURVEYS

- Gather feedback from customers
- Report on aggregate datasets
- Associate to Case entity in CRM
- Use skip logic to filter questions
- Follow up on feedback quickly (automated Actions)



# RESOURCES

- A recorded version will be available via follow up email/Partner Page
- Forms Help articles: <http://help.clickdimensions.com/category/forms/>
- Surveys Help articles: <http://help.clickdimensions.com/category/surveys/>
- Re-create Form Actions for Form Capture with CRM Workflows: <http://blog.clickdimensions.com/2014/10/using-workflows-to-re-create-form-actions-for-form-captures.html>
- Register for CD201 (recommended for Partners and Customers!): <http://help.clickdimensions.com/clickdimensions-academy/>



# RECAP

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# QUESTIONS?

Password: 2016CDPartner!

