

Surveys: Getting Started Guide

Brief Overview

WalkMe Surveys allow you to ask your users questions and collect feedback from their responses. The survey data can then be analyzed for your use in Insights.

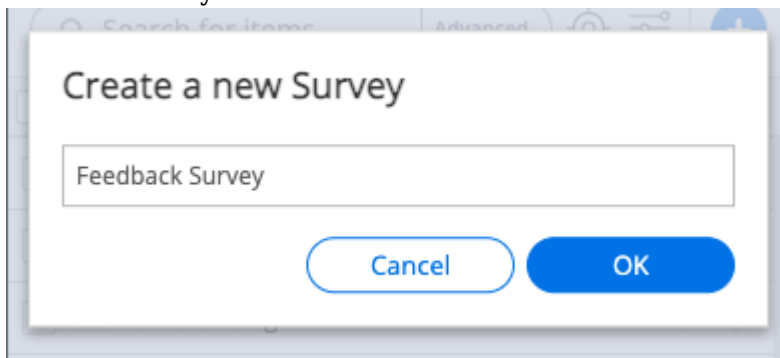
[Surveys](#)



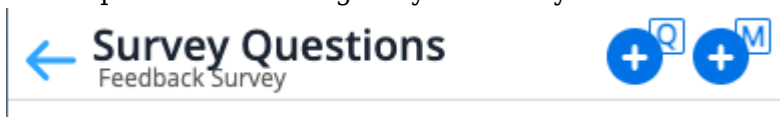
Watch a WalkMe Solution Engineer explain how and why to use surveys

Create a Survey

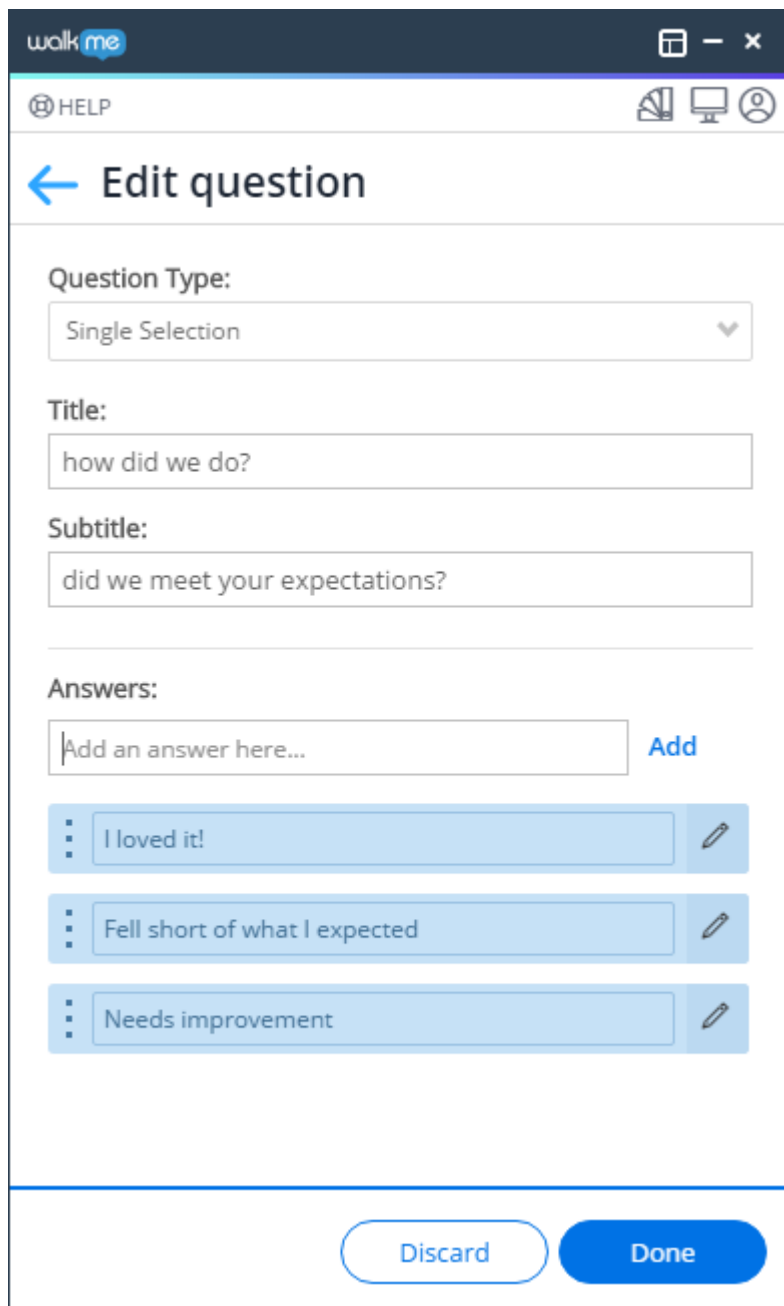
1. Click the **blue +** button in the editor to create a new survey
2. Give the survey a name and click **Continue**



3. Add a question or message to your survey



- **Message:** Click the **blue +** button with an **"M"** if you want to add a general message to the survey
 - **Question:** Click the **blue +** button with a **"Q"** to add a question
 - Add your question in the **Title** field and include optional subtext in the **Subtitle** field
 - The format of answers will vary depending on the question type
 - [Learn about the supported question types](#)
4. Click **Done**
 5. Continue adding messages and questions
 6. Click **Save** once your survey is complete



walkme

HELP

← Edit question

Question Type:

Single Selection

Title:

how did we do?

Subtitle:

did we meet your expectations?

Answers:

Add an answer here... [Add](#)

- I loved it!
- Fell short of what I expected
- Needs improvement

[Discard](#) [Done](#)

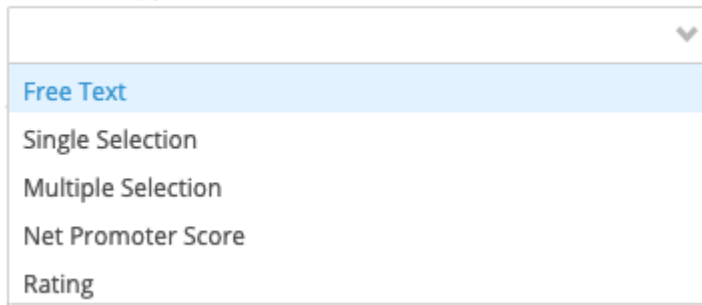
Tip

If you need to reorder your questions or answers, hover over the three dots on the left-hand side and drag them where you want them.

Question Types

There are multiple question types available to support the use case for your survey.

Question Type:



A dropdown menu with a light gray border and a downward arrow in the top right corner. The menu is open, showing five options: 'Free Text' (highlighted in light blue), 'Single Selection', 'Multiple Selection', 'Net Promoter Score', and 'Rating'.

Free Text

- Users will see a question and text box to fill in the answer of their choice
- Add your question in the **Title** field and include optional subtext in the **Subtitle** field

Single Selection

- Users will see a multiple choice question and can only select one option by clicking the radio button next to the answer
- Add your question in the **Title** field and include optional subtext in the **Subtitle** field
- Type each answer option individually and click **Add**

Multiple Selection

- Users will see a multiple choice question and can select as many options they want by clicking the radio buttons next to the answers
- Add your question in the **Title** field and include optional subtext in the **Subtitle** field
- Type each answer option individually and click **Add**

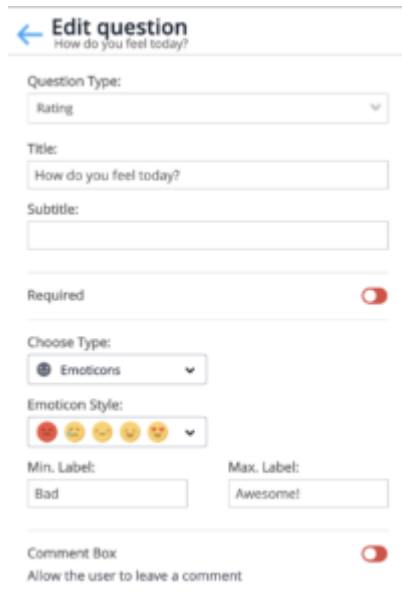
Net Promoter Score

- Users will see a standard NPS question and can choose from a scale of 1-10
- Add your question in the **Title** field and include optional subtext in the **Subtitle** field
- Edit the **Low Score** and **High Score** labels to reflect how you want to measure your scale

Rating

- Users will see a question that they can rate on a scale of 1-5
- Add your question in the **Title** field and include optional subtext in the **Subtitle** field
- Choose the icon type and adjust the color or emoticon style

- Edit the **Min** and **Max** labels to reflect how you want to measure your scale
- Turn on the **Comment Box** if you want to allow the user to add free text notes to their answer
- Type the hint that will be presented to the end-user before they start to type their comment



Edit question
How do you feel today?

Question Type:
Rating

Title:
How do you feel today?

Subtitle:

Required ☒

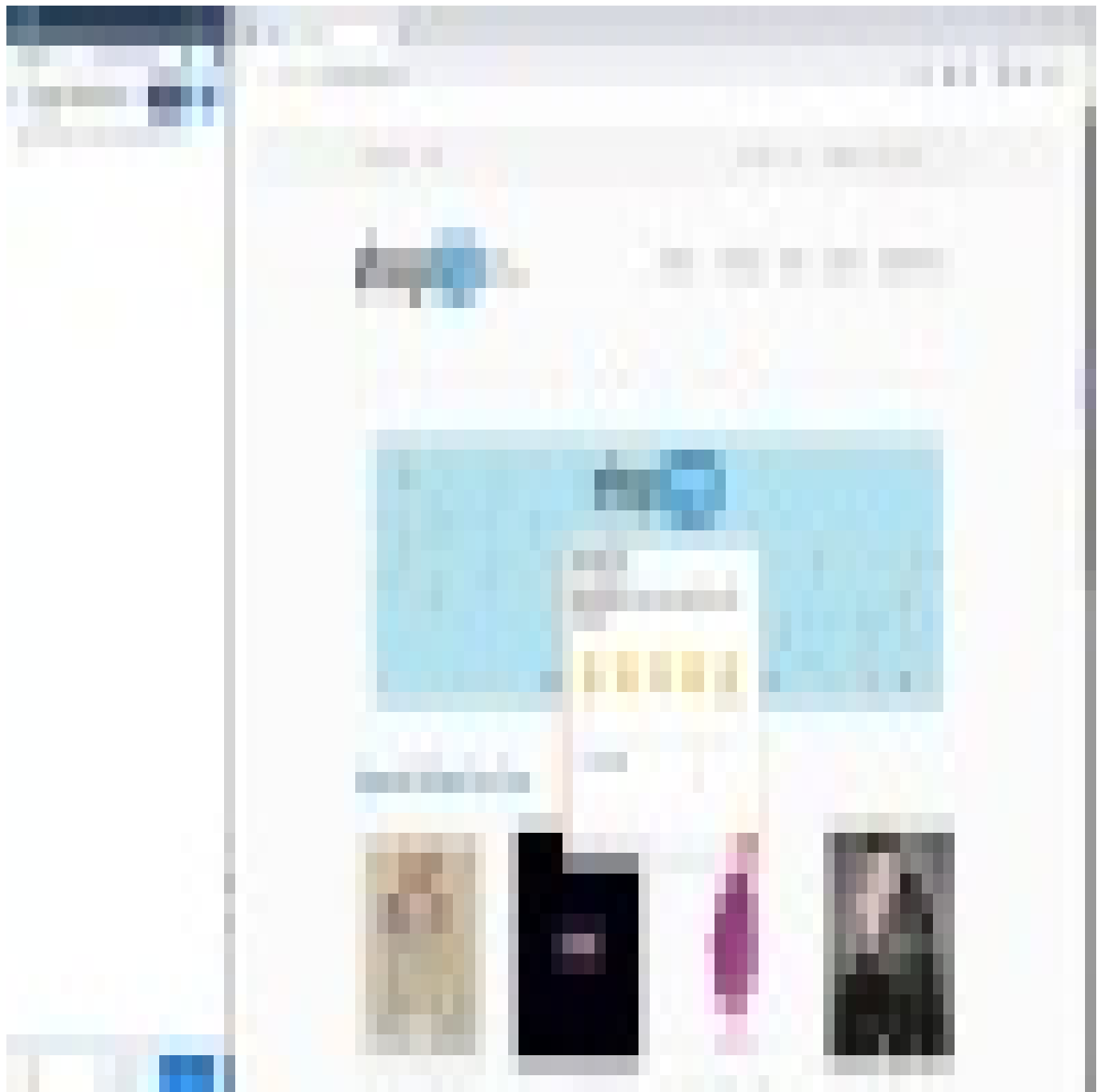
Choose Type:
Emoticons

Emoticon Style:
5-point scale

Min. Label:
Bad

Max. Label:
Awesome!

Comment Box ☒
Allow the user to leave a comment



WalkMe Community

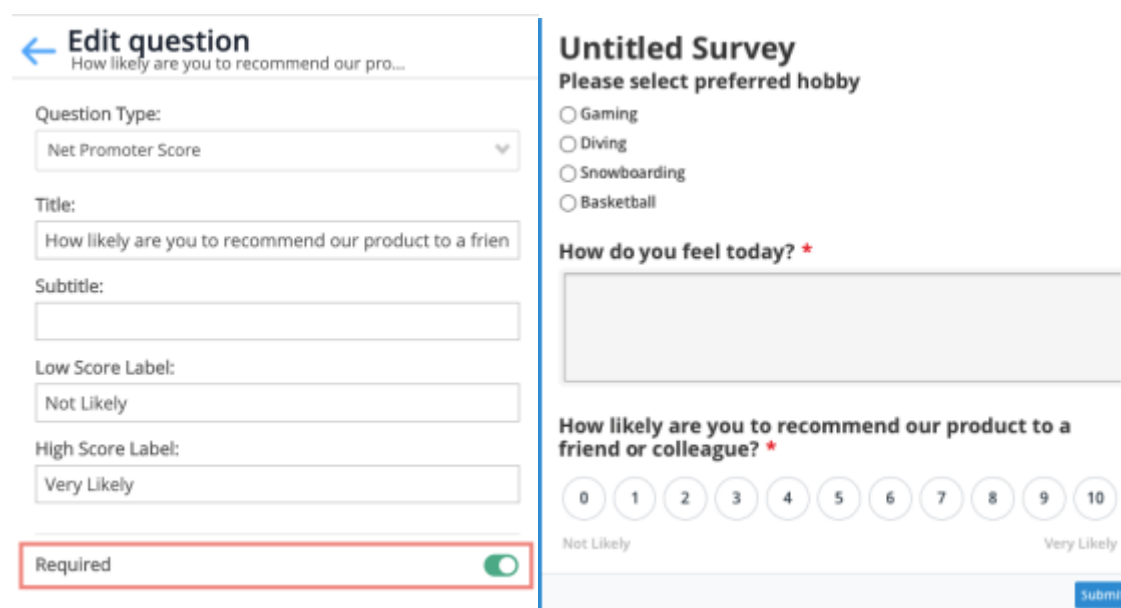
[Join the conversation in the WalkMe World Community!](#)

Survey Settings

After creating a survey, open the settings to configure how the survey will appear and how users interact with it.

Required questions

Turn on the “**Required**” toggle if you want to make survey questions mandatory for users.



The screenshot shows the 'Edit question' interface for a survey titled 'Untitled Survey'. On the left, the 'Question Type' is set to 'Net Promoter Score'. The 'Title' is 'How likely are you to recommend our product to a friend or colleague?'. The 'Subtitle' is empty. The 'Low Score Label' is 'Not Likely' and the 'High Score Label' is 'Very Likely'. At the bottom, the 'Required' toggle is turned on. On the right, the survey preview shows the question 'Please select preferred hobby' with radio button options: Gaming, Diving, Snowboarding, and Basketball. Below that is a question 'How do you feel today?' with a large text input field. At the bottom of the preview is a Net Promoter Score scale from 0 to 10, with 'Not Likely' at 0 and 'Very Likely' at 10. A 'Submit' button is visible at the bottom right of the preview.

Note on required questions

When viewing survey submissions in Insights, numbers can include surveys that were submitted without responding to non-required questions. Meaning, a report export could be empty even though a submission was recorded. [Learn more.](#)

Design

It's possible to customize your survey design using CSS.

[CSS for Surveys](#)

Engagement tab

The **Engagement** tab contains settings related to user-survey interaction. This includes auto play, replay, and more.

Engagement

Auto Play

Create a rule to determine under which conditions this Survey will automatically play.

- ☐ Off (Initiate this Survey via launcher or Walk-Thru)
- ☒ Play according to a rule [Update Auto Play Rule](#)

Replay Settings

Once a Day ▼

Cancel Auto Play once the user clicks:

- ☒ Submit Button
- ☐ "X" Button

Replay after completing a Walk-Thru

Set the maximum number of times a user will be exposed to the survey after completing a Walk-Thru.

Play the survey ▼

Auto Play

- Select whether to use auto play to launch your survey
 - If you don't use auto play, you can instead begin the survey from a Launcher, ShoutOut, or Smart Walk-Thru
- **Create an Auto Play Rule:** Display a survey automatically according to a rule
- **Replay settings:** Select the frequency with which the survey should play (*Once, Once a day, or Always*)
- **Cancel Auto Play when user clicks:** Choose whether you want to cancel the auto play rule you created (and not show the survey to the user again) when these conditions are met:
 - The user clicks the **Submit** button
 - The user clicks the **"X"** button

- Both of the above occur (you can check both boxes)


Note


Unique user settings must be enabled in order for auto play to work.

Replay After Completing a Smart Walk-Thru

Control how often a user sees a survey at the end of a Smart Walk-Thru. From the Smart Walk-Thru **Initiators & End Experience** menu, a survey may be configured to automatically play either when the final step of a Smart Walk-Thru is completed, or when the user stops playing the Smart Walk-Thru.

Initiators & End Experience

 Initiators

 End Experience

When user clicks "x"

Survey

Frequency

When user completes the Walk-Thru

Survey

Frequency

When user clicks "X"

- Select the survey you want to play when the user clicks an "X" button in one of the Smart Walk-Thru balloons
- Select the frequency in which this survey will play after the user clicks an "X"

When user completes the Walk-Thru

- Select the survey you want to play when the user completes the Smart Walk-Thru
- Select the frequency in which this survey will play

This configuration does not affect the auto play settings and frequency listed at the top of the Survey

Settings Menu.

Tip

If you want a survey to play only if a user goes through a specific branch in a Smart Walk-Thru, follow these steps:

1. Create a separate Smart Walk-Thru with a Wait for Step that waits 0 seconds
2. Click the **End Experience** button
 1. Under “When user completes the Walk-Thru” select your survey
 2. Set the frequency for how often you want the survey to play at the end of the branch of your original Smart Walk-Thru
 3. Click **Save**
3. Go back to the branch of your original Smart Walk-Thru
4. Add a “Connect to Smart Walk-Thru” step at the end of the branch and connect to the new Smart Walk-Thru that has the survey

Appearance tab

The appearance tab contains settings related to what the user sees, and how frequently he/she sees it. These include display options and spotlight setting.

How did we do

X

Survey Settings

Engagement

Appearance

Appearance

Display Options

☒ Show Survey name

How did we do

Edit

☐ Hide Survey name

☒ Show questions one-by-one

☐ Show survey name only on first question

☒ Show questions count e.g. 1/4

Enable Spotlight

Play

Cancel

Save

Display Options

- **Show survey name:** Here you can provide the survey with a name and edit the survey name

Tip

The survey tooltip in the editor will show the survey's current name as selected or modified above.

- **Hide survey name:** Here you can decide whether the user will see the survey's name

Tip

When creating a new NPS Survey, the survey name will be hidden by default to emphasize the title

of the NPS question only. The name can later be altered manually.

- **Show question one-by-one:**
 - If turned on, only one question displays at a time with *Next/Back* buttons
 - If turned off, all questions will display as one form in the order they are listed in the Editor
- **Show Survey name only on first question:** The user will only see the survey's name on the first question
 - This option will be disabled if you've elected to hide the survey name from the user
- **Show question count:** Show users how many questions are left in the survey

Note on messages


- A message is not part of the question count. When "Show questions one-by-one" and "Show questions count e.g. 1/4" are both selected in the appearance tab of the survey settings, messages will not be included in the count and the count will not shown when viewing the message
- If "Show questions one-by-one" is selected and a message is the last item in the survey, the "Submit" button will be shown on the last question before the message and a "Done" button will be shown when viewing the message

Enable Spotlight

Engagement

Appearance

Appearance

Display Options 

Enable Spotlight 



Screen overlay 

Opacity

0.7



UX tip: Use Spotlight with discretion as it interferes with users' natural workflow



Play

Cancel

Done

Turn on to fade the background when displaying the survey.

- You can turn on **Enable Spotlight** to disable the spotlight overlay
- This will allow the user to continue interacting with your site while the popup is visible

Play a Survey from the Menu

In order to add a survey to the WalkMe Menu, add the survey to the end of a one-step Smart Walk-Thru (End Experience).

1. Create your survey
2. Create a new Smart Walk-Thru
 - The Smart Walk-Thru name you choose will be the survey's name in the menu
3. Click **Continue**
4. Add a Wait for Step that waits for 0 seconds

5. At the bottom left of your Smart Walk-Thru, you'll see an option for **End Experience**
 - **Note:** The End Experience button only displays when there is at least one step in the Smart Walk-Thru, which is why it's necessary to have the 0 second Wait for Step
6. Click on that and it will open the menu where you'll see available options for **Initiators & End Experience**
7. Under "When user completes Walk-Thru" select your survey from the dropdown
 - Set Frequency = Always

Tip

Check the [menu organizer](#) to make sure your Smart Walk-Thru is configured to display in the menu.

Survey Results

In order to see your survey results, go to Insights, at insights.walkme.com. Make sure you are viewing the correct system and go to the Survey app page.

[Insights Apps Pages](#)