


### Why Preload Respondent Data?

It is best practice to preload data you already know about your customers before sending out survey invites. This often includes ‘demographic’ fields such as Name, Location, Organisation, the Product/Service purchased, as well as the Branch/Store/Channel that they are a customer of.

Preloading respondent data has two main benefits:


- 1) **Happy Respondents:** Preloading things you already know means that you don’t have to ask them – making your surveys shorter, which can help improve your survey completion rates.
- 2) **Reporting Insights:** Once you have collected your survey results, you will be able to apply ‘filters’ in your reports to drill down using the various demographic fields. This enables you to gain insights into how responses from various demographics compare, e.g. by looking at ‘Overall Satisfaction’ by Product/Service type, or by comparing ‘Satisfaction with Response Times’ by Branch etc.

 **Power Tip:** A popular question for comparisons and KPIs is the NPS (Net Promoter Score®), e.g. the review of NPS results by location or product purchased.

### Commonly Used Preloaded Fields for Customer Surveys

Customer Name	Channel (which Brand/Product/Service)	Organisation Industry
Customer ID	Location (e.g. Branch/Store/Online)	Relationship Manager
Contact Details	Organisation Name	Internal Rating (Tier / Annual Value)
Tenure (how long they have been a customer)	Organisation Size	Customer Potential

**Important Note:** You may choose to provide for anonymity in your surveys. To do so, it is common to not preload any personal identifying information such as ‘Customer Name’ or ‘Customer ID’. You can also use the ‘Locked Anonymity Number’ feature of our Reporting Suite to protect against drilling down results to a granular (individual) level.

 **Power Tip:** PeoplePulse has an ‘Auto Date Filters’ feature that enables you to easily find trends by comparing your results over months, quarters and years.

### Tell me more!

PeoplePulse specialises in the design and delivery of exceptional surveys and reports. To learn more about our Customer Survey solutions and for a free demo, say hello:

by phone: +61 2 9232 0172  
 or visit us at: [www.peoplepulse.com](http://www.peoplepulse.com)

