

## EE Podcast #53 Data Gathering: Polls, Surveys, Quizzes

[Intro music]

**Lea Alcantara:** This is the ExpressionEngine Podcast Episode #53 where we talk about data gathering, polls, surveys and quizzes. I'm your host, Lea Alcantara, and I'm joined by my co-host, Emily Lewis. This episode is sponsored by EECl 2011. EECl is up for its 5<sup>th</sup> season and this time it's returning to the United States of America the most significant conference where ExpressionEngine developers, designers and users will run from October 19<sup>th</sup> to the 21<sup>st</sup> at the Invincible Dog in Brooklyn, New York. A few tickets are still available so check out [EEClConf.com](http://EEClConf.com) for more details.

**Emily Lewis:** The ExpressionEngine Podcast would also like to thank Pixel & Tonic for being our major sponsor of the year. So Lea, how have you been?

**Lea Alcantara:** Not too bad. Not too bad. How about you?

**Emily Lewis:** I'm coming from a little cold, so hopefully we will be able to get through this podcast without too much coughing. [laughs]

**Lea Alcantara:** I mean, that's the power of editing.

[Both laughed]

**Emily Lewis:** Right. So I know today we are going to be talking about data gathering with polls, surveys and quizzes, but before we dive into that discussion, I wanted to take a minute to let our listeners know that the EE Podcast was nominated as one of the top ten podcast in .Net Magazines 2011 Net Awards.

**Lea Alcantara:** Whoohooo!

**Emily Lewis:** I know...

**Lea Alcantara:** It mentions us. [Laughs]

**Emily Lewis:** It's fantastic. Well, actually, I was going to say that I think both you and Ryan Irelan and 5by5 Studios for that matter deserve a credit for this nomination.

**Lea Alcantara:** Oh, thank you so much.

**Emily Lewis:** Thanks to your continued commitment to the ExpressionEngine community and the podcast itself, we are now enjoying fantastic listenership and support, and I think that's why the podcast now ranks amongst hugely popular podcasts like Boagworld and the Big Web Show. I'm so honored to now be a part of it.

**Lea Alcantara:** And I'm so happy that you are a part of this as well because I think part of the reason why we are also nominated this year is because of the re-launch as well, so I'm really happy to have you around, and I'm so honored for the EE Podcast to be nominated.

**Emily Lewis:** It's really exciting. So dear listeners, voting ends this Friday, September 30<sup>th</sup>. That means you have today, Thursday, and tomorrow, Friday, to vote, if you haven't already. So please take a moment to go to [www.thenetawards.com](http://www.thenetawards.com), and cast a vote for our podcast.

**Lea Alcantara:** Awesome.

**Emily Lewis:** Whoohoo!

**Lea Alcantara:** Yeah. Hopefully, there is enough time to get some votes in. [Laughs]

**Emily Lewis:** Yeah.

**Lea Alcantara:** But like they say in the Oscars, I'm just honored to be nominated.

**Emily Lewis:** It's very exciting. I mean, when you look at the list of the other podcasts that were included amongst, it's a real honor.

**Lea Alcantara:** Oh, absolutely, absolutely.

**Emily Lewis:** Yeah.

**Lea Alcantara:** And so to get onto our topic at hand, data gathering. So what exactly is data gathering because ExpressionEngine is a content management system, so that essentially can mean anything really, like just taking any type of information via contact forms or maybe the standalone entry forms with custom fields and things like that. But I think the issue with that, I mean not that there is anything wrong with that and I think that's what the majority is, ExpressionEngine developers use whenever they try to gather some type of information, but I think the main issue with that is there is no automated way to gather statistics if there are specific pieces of information in those forms that people want.

**Emily Lewis:** Yeah, for me, it's easy to think of a system like CMS as just a front end for a database really.

**Lea Alcantara:** Yes.

**Emily Lewis:** And that you can pull anything out of it, but the point is that there isn't anything inherent that lets you then easily do something with the data that you've gathered.

**Lea Alcantara:** Yeah, absolutely.

**Emily Lewis:** Have you ever implemented any? I mean, I've done your average "fill out this form, so you can contact us," but that's about the extent of the kind of data gathering I've done on any kind of sites. I've never done any sort of survey or poll.

**Lea Alcantara:** Well, for me, I've had several clients ask for polls specifically. In many ways though, I'm not a hundred percent sure the particular clients that I work with asking for polls. I mean, I implemented it for their site. I think they wanted more of an interactive element on their site rather than using it to actually gather information because I think it's something that we always have to deal with clients is they are always requesting like neat, little things and stuff like that, but then the reality sets in that someone needs to gather this data and do something with it.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** So I know I found out with one particular client, we did have polls, but no one actually stepped into finish gathering the data. So I think a problem with implementing polls just for the sake of it is that the information gets stale and then soon if you don't actually update the poll or do something with that data somehow or make a post about the findings, things like that. Then if you've got repeat visitors to the site, people are just going to ignore those polls completely.

**Emily Lewis:** Exactly, exactly. Well, I mean, I know that just as a user, if like CSS-Tricks often has polls on the site and they are relevant to me as a designer. The kinds of questions Chris poses are interesting to me.

**Lea Alcantara:** Yeah.

**Emily Lewis:** Which makes me inclined to answer them, but it also makes me inclined to check back and find out what the findings are.

**Lea Alcantara:** Yeah.

**Emily Lewis:** If you have a site that doesn't provide that, you are right, you are going to just be, as a user, you are training your users not to answer your polls.

**Lea Alcantara:** Yeah, absolutely, and but that being said though, there is something to be said about just trying to make things a little bit more interactive because a lot of it depends on what the goals of the site it. When I created this landing page for a high school client of mine, it was a landing page for potential students, so the age range is about 14 to 15 years old and it's to make essentially the brand of the school seemed fun. So they asked me like we need to have a poll on the page to ask them what their best movie ever is.

**Emily Lewis:** [Laughs]

**Lea Alcantara:** Obviously, no one in the faculty really cares.

[Both laugh]

**Lea Alcantara:** It's not really there for data gathering as opposed to having an interactive element on the page that once the enter in whatever they chooses as if they are voting, they feel that they are voting, and then they get some instant feedback in terms of a pie chart that's colorful or some kind of bar charts so that they can compare their own thing. Because kids do like to kind of vote of their favorites, so they can make sure it's ranked higher.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** And normally that's not really the main point of a poll, although sometimes when you watch the news media, that seems to end up being happening, what's the most popular answer, whether or not that the data actually has any useful meaning whatsoever. It becomes irrelevant.

**Emily Lewis:** Well, I think that's a good point. I mean, you mentioned that the client, they were aiming for interactivity, but it also seems to me, and it reminds me of some of my clients that are in the association industry where they are seeking members, one of their goals is not only interactivity, but to create a sense of community, which sounds like that high school

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thing where you have people sort of engaging with the websites and seeing how other people are engaging in. It creates a sense of community. It could be very valuable aside from a data gathering perspective.

**Lea Alcantara:** Yeah, for sure.

**Emily Lewis:** So when you have that high school client, was that an EE site?

**Lea Alcantara:** Yeah, yeah.

**Emily Lewis:** But how did you implement it?

**Lea Alcantara:** Well, they are currently on EE 1. Hopefully, we will be able to switch all that over sometime soon, but when I first implemented that site, we used I think the very, very first polling add-on, which was Leevi Graham's Polls.

**Emily Lewis:** Polls, yeah.

**Lea Alcantara:** Simply Polls. Yeah, and it does exactly what we wanted where you get a couple of radio buttons. Once it's done, it auto-counts everything and then you get a nice graph and you get a choice of which type of graph to show as well because I believe it's using like the Google Graph API or something like that to auto-generate the final graphics.

**Emily Lewis:** Oh cool.

**Lea Alcantara:** And I believe a lot of the add-ons actually, but I am not a hundred percent sure because I haven't used the other add-ons per se, but a lot of them used the Google API. I'm not sure if any of them do anything proprietary.

**Emily Lewis:** Well, speaking of other add-ons, I know that we had kind of gathered some research on what was available. There is not a whole lot left right now for EE 1 at this point.

**Lea Alcantara:** No.

**Emily Lewis:** You mentioned LG Polls, Leevi's add-on. I took a look at his list of add-ons that are still available for EE 1 yesterday and I didn't see Polls on the list.

**Lea Alcantara:** Yeah.

**Emily Lewis:** So I'm not sure if that's even available anymore. There is one I did find. I've not used it, but their site is kind of impressive. It's called 4eeQuiz.

**Lea Alcantara:** Interesting.

**Emily Lewis:** They are available for 1 and 2, and the site is impressive. I'm hoping that add-on itself is equally impressive, but what's nice about the site is they actually have demo quizzes and surveys you can see on how their add-on works from the user's perspective. So you can see how a quiz works, how it calculates the results, the way it gives errors, where the next and previous buttons appear, which is nice to sort of like do a test drive before you implement something. So I thought that was kind of cool.

**Lea Alcantara:** Yeah, that is pretty cool. Actually, I'm looking at that site right now. I'm not sure like is 4-ee an actual development firm, or is that just there.

**Emily Lewis:** Yeah, it looks like 4-ee is an add-on firm and 4-eeQuiz is the module that's specific for quizzes and surveys.

**Lea Alcantara:** And for those that are wondering, like I'm just looking at their change log. They just updated it on September 21<sup>st</sup>, so it looks like it is the most expensive data gathering add-on that we are going to be mentioning on this podcast at \$125, but they have been very active. So that data I'd like to point that out because I know there is a lot of people whenever they are trying to decide, "Can EE do this? Oh yeah, there is an add-on." But there is always a but whenever you see an add-on like is this actively being developed, when is the last time it's been updated, how is their support system, et cetera, and so forth. So you have to take a look at that, and just by briefly looking here, it looks like they just recently updated it. They do provide support at GetSatisfaction.com. And yeah, it's very, very interesting.

**Emily Lewis:** This is slightly off topic, but do you visit Devot:ee when you want to check out the ratings for an add-on? Do you ever refer to those ratings and the reviews that are on Devot:ee?

**Lea Alcantara:** You know, I don't know if I ever actually checked the ratings per se, but I check to see if there are comments. I check to see the comments, and I check to see the forums because there are built-in forums in Devot:ee and then depending if it's a free add-on or a developer add-on, you just want to see if there is some type of activity, and then you check to see how recent that activity is. And then it is one of those things, especially if it's a new add-on. Like if it's an old add-on then it's pretty easy to trust that it's going to work and it will continue to work. If it's from a prominent developer that's been around the community for years, then that's not much of an issue. But there are a lot of people trying to break into this lucrative, third-party add-on mini-industry we have here with ExpressionEngine. It's exciting as for me, at least, to see these new add-ons being started, but at the same time, I'm weary because I don't know these people.

**Emily Lewis:** Right.

**Lea Alcantara:** I don't know their reputation. I don't know if it's going to continue, and the issue is there have been developers that have come and gone.

**Emily Lewis:** Good point.

**Lea Alcantara:** Yeah, yeah.

**Emily Lewis:** Well, regarding the other modules that we found, if you recall we had Tom Jaeger on our site.

**Lea Alcantara:** Yes.

**Emily Lewis:** We talked about multi-language sites.

**Lea Alcantara:** Yeah.

**Emily Lewis:** He is with EE Harbor. He also has a module for polling available for ExpressionEngine version 2, and it also looks like it's being maintained really well. With most of his modules, it looks like he has that level of commitment to it.

**Lea Alcantara:** Yeah.

**Emily Lewis:** It is for sale for \$40.

**Lea Alcantara:** Yeah.

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**Emily Lewis:** So it's a little bit less expensive than the one we mentioned previously at a 125, but it is only available for EE 2.1 and older, or newer rather.

**Lea Alcantara:** Yeah, yeah. I mean, one thing that is different from that too is that the first one is marketing itself. It's less of a polling as opposed to like they are calling it an LMS, a learning management system, the 4eeQuiz that is versus EE Harbor's Polls is specifically just a few questions that you are trying to gather data about.

**Emily Lewis:** Yeah, a good point. The 4eeQuiz thing, it definitely seems like it's aimed at people who do a lot of surveys and quizzes online. Not necessarily the polls, but a more in depth way of finding information from users.

**Lea Alcantara:** Well, on that note, I know that you teach at a local university over there. Have you ever done anything? Like do you quiz your students? And if you do, have you done anything that's not traditional pen and paper?

**Emily Lewis:** I haven't tried anything untraditional, like an online quiz. It certainly makes me think that would be a fun thing to give a go at, but it's also one of those things that between creating the syllabus and the curriculum and getting something set up is sort of the last thing on my list.

**Lea Alcantara:** Yeah.

**Emily Lewis:** But when you are teaching people web design and development, I like to keep as much stuff online as possible just to get them in that mindset.

**Lea Alcantara:** Yeah.

**Emily Lewis:** The syllabus is online, all their exercises are online, so this would be a great idea for me to think about adding a new level to my class work or to the classroom.

**Lea Alcantara:** Yeah, it's definitely very interesting. I mean, just still slightly off topic. It's not that I've had huge teaching experience. I've had one semester. I purposely decided not to do any quizzes, mostly because I feel like certain things, like certain definition of things become so flexible in our industry and even myself I always use references. I never memorize everything beyond just the basics.

**Emily Lewis:** Right.

**Lea Alcantara:** So I felt like it was not really realistic to be like, "Okay, strong tag versus bold tag. Oh, well, are you using HTML 5 or am I teaching them HTML 4?"

**Emily Lewis:** Right.

**Lea Alcantara:** Do you see what I mean? Like now, that becomes like a discussion more than it is like check mark or X, right?

**Emily Lewis:** That actually brings up a good point that aside from ExpressionEngine, when you are crafting a survey or quiz, all the research that I did in preparation for the podcast don't have a lot of open-ended questions because survey respondents, especially if it's not something that they are compelled to do other than their own interest like with students,

they have to take a quiz, but people don't want to necessarily fill out a survey or a quiz where they have to enter a lot of their own information. They really do prefer the selection of answers or responses that they select from.

**Lea Alcantara:** It's got to be clear.

**Emily Lewis:** Exactly. In fact, one of the articles I came across sort of talked about why people abandon a survey in the middle of it. One of them is because there are just too many open-ended questions. There isn't an opportunity for people to just select and submit their answers and get it done and over with.

**Lea Alcantara:** Do you think that there is any value in having any type of open-ended questions, maybe like in an exam situation?

**Emily Lewis:** Yeah, I mean, I think certainly when you have a captive audience. They have to complete the survey. There isn't an option for the quiz.

**Lea Alcantara:** Yeah.

**Emily Lewis:** Then yeah, I mean it makes sense. How else are you going to understand how much they know about a given topic? And even as a user, once upon a time I signed for something where I got paid to take surveys.

**Lea Alcantara:** Oh, my goodness.

**Emily Lewis:** Yeah, and I would always bail on the ones that were just too long or had too many open-ended questions because I didn't want to spend all that time doing it, and I did have incentives to complete them, but I wasn't required to do any given one. So I think you have to remember to think about your user in the audience. If you have an audience who is really invested in your organization or cause and you know that they are going to take the time to complete a survey and offer a lot of feedback, then go for that. But if you've got an audience that you are just randomly hitting people asking for feedback, make it easy for them to respond and get it over with.

**Lea Alcantara:** Yeah, absolutely, absolutely, and I mean, you mentioned something about making it easy for respondents. I mean, if it's an exam situation, the point isn't to make it easy, but to make it answerable in the first place.

**Emily Lewis:** Good point.

**Lea Alcantara:** Because if you are going to go into an exam situation or a quiz situation, you don't ever want to be in that situation with the student just arguing semantics because you phrased the question incorrectly, so as clear as possible. But the other flipside of that about making things easy, think about how do I make data gathering easy for my client's side with ExpressionEngine? So right now we mentioned two commercial add-ons, the 4eeQuiz and the EE Harbor, and at first glance, part of the reason why you can see that they are commercial is, obviously, their feature set and the amount of support they provide.

**Emily Lewis:** Support.

**Lea Alcantara:** But beyond even that, especially when you look at other commercial add-ons that aren't related to data gathering, I've noticed that commercial add-ons tend to focus on the user interface and user experience of their add-on a

lot more like whether they've simplified things or the design or the layout of things seem a lot more well thought out. There is that level there I find in more commercial add-ons, I think mostly because they are trying to sell it and they want to have that extra polish on there.

**Emily Lewis:** Right.

**Lea Alcantara:** Not that I'm saying that free add-ons don't have any of that thought on there. It's just that I think when you have a commercial add-on, there is an expectation...

**Emily Lewis:** Exactly, I mean...

**Lea Alcantara:** There is an expectation that it should be superior.

**Emily Lewis:** Well, yeah, and you are paying for an add-on and every little thing that it can do to make your life easier as the implementer is going to be appealing and help you make that purchase decision.

**Lea Alcantara:** But if say you are squeezed on your budget by...

**Emily Lewis:** Like I always am.

**Lea Alcantara:** Yeah, and you do need to have some type of survey or a poll functionality for your site, there are two add-ons that we found called VWM Surveys and VWM Polls. I'm not even going to pronounce his last name, but his first name is Victor, that's the developer, and he has provided his EE 2 add-ons for free. The one that looks really interesting to me because of the way that's a little bit differently implemented is his polls add-on, which is free. It looks like it's a module and field type that you see in your published, but then he adds additional tabs so you can actually fiddle around with the settings of the polls right on the field type like while you are in the Publish screen, which is totally different from what I've noticed where you have to actually go to the channel and then go to the fields and then you add it through there. That's usually the general way you change the settings of anything really in ExpressionEngine if it's a field type. But what I noticed with VWM Polls, he's got his first tab which is options where you can add the different options and the text and things like that, and then he's got the second tab called settings, which you normally find in the channel custom field's admin page as well as the poll results right all on the Publish page, so if you are in the Edit Entry Publish page, you see all three whether you can add the data, change the poll settings and see all the results all in one place, which kind of impresses me in terms of client management. Because with the client, the more you can make it easy for them to have everything all in one place...

**Emily Lewis:** For them...

**Lea Alcantara:** Yeah.

**Emily Lewis:** For them to see the results and the information right there.

**Lea Alcantara:** Yeah.



**Emily Lewis:** Yeah, I'm looking at his add-on page on Devot:ee. He has some screenshots of this. If any of our listeners want to check it out before they give it a try, but yeah, it does look very nice. He does mention on Devot:ee that it's still in beta, but he's still actively working on it.

**Lea Alcantara:** Yeah.

**Emily Lewis:** And it looks like it's got some decent ratings and no comments yet, but we will see. It looks relatively new.

**Lea Alcantara:** Cool, cool. I think ExpressionEngine developers are also really good at twisting functionality of ExpressionEngine and add-ons and things like that, and when I look at this, I could see how this could be integrated in a Safecracker form, and I didn't even think about that until I saw that VWM Poll says, "We now support Safecracker." So in many ways, if you can have, let's say, maybe this is a feature request to anyone doing polls, if you have custom field functionality to certain polling options where we can have data gathering automatically for all of that. I know for one of my clients I'm thinking about that actively right now because like you said, with ExpressionEngine, it's a content management system where it's just the front end for a database, so I'm pulling all this database information for one of my clients, but right now we are kind of manually counting some of the information and then kind of making all statistics on the side, but with things like this we could possibly help automate that.

**Emily Lewis:** Yeah, it's pretty interesting. It's one of those areas that I haven't gotten into yet, but it's another reason why I like being on the podcast. It's nice to do all the research, so I'm prepared when the times comes.

**Lea Alcantara:** Yeah, yeah, because you just never know. Clients will always come up with something, and at the same time too, just as a professional, if you get a client where you can see value in providing polls or quiz or survey of some sort, then that's great. I mean, another thing too is, say, you have a continual client and you are trying to, say, sell them into updating their site and they are not a hundred percent sure, or you are trying to prepare for a major upgrade, having a survey where you can get visitors of the site making comments about their experience on the site is another great thing to mention to your client, and it's something that you could already implement into the EE site that you have.

**Emily Lewis:** I also wanted to make sure that we didn't forget to mention, there is one other module. It is available as a commercial purchase for \$35. It's from DevDemon Channel Polls.

**Lea Alcantara:** Yeah.

**Emily Lewis:** And it seems to offer the same core functionality that the VWM Polls offered where you could modify the poll settings and see the results, but it looks like it's tied to the channel and not the actual content entry field, at least according the screenshots I'm seeing on Devot:ee. But as a commercial product, it obviously has great support. It has a good review on Devot:ee that it's just highly recommended. It's really easy to implement.

**Lea Alcantara:** And DevDemon, they are very active in the community. So it's one of those things where you are trying to narrow down between one or the other. Like a lot of times people win based on support, right?

**Emily Lewis:** [Agrees]

**Lea Alcantara:** And that might be part of the DevDemon's Channel Polls kind of selling point here as well.

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**Emily Lewis:** It's their support.

**Lea Alcantara:** Yeah, but do you know what's also interesting? I was just talking about free one with the three tabs. Channel Poll does it too, actually. It looks like that you are able to do everything on the same screen, like you could have the answers and then you can change the color, but the difference between change of colors, you get to choose colors visually as opposed to plugging in the six-digit hex value right away, which is a lot more user friendly, but you can also change your poll settings right on the Publish screen it looks like, and then see the results as well. It's pretty cool.

**Emily Lewis:** Have you ever used any of those? They are not tied to ExpressionEngine's, but they are like online survey tools like SurveyMonkey or Wufoo.

**Lea Alcantara:** I haven't implemented one, but I've answered them.

**Emily Lewis:** [Agrees]

**Lea Alcantara:** Yeah.

**Emily Lewis:** Yeah, I've not worked with SurveyMonkey. I've answered lots of SurveyMonkey surveys. I was just looking at their site the other day. I think it's an option. I think if a client wanted just like a one off sort of thing and didn't have a need to have something built into their ExpressionEngine system, that these might be good options. The thing I liked about SurveyMonkey was they have good example surveys on the site, and what I liked about that was the fact that I know sometimes clients have these great ideas, but they don't always have the knowledge to execute them the way they envision it to be.

**Lea Alcantara:** Yeah.

**Emily Lewis:** And SurveyMonkey have really good examples of surveys that not only like you could just use the template, but of how to phrase questions, how to organize questions, the order in which you ask things, that I thought was a good point of reference even if you only just get ideas from them and not necessarily use the tool.

**Lea Alcantara:** Yeah. Oh, for sure. Actually, I was just looking at my one other client here, and they use SurveyGizmo and they asked me to integrate that because they've already been using it for a while into the ExpressionEngine site, which is pretty easy because it's just like a little Java script thing. Now, one thing that I want to mention too is whenever you think about using a third-party thing, so let's say you decide to use SurveyMonkey or Wufoo or something else that isn't ExpressionEngine add-on, I'm always concerned whether it will look natural in the system because usually whenever you add like one of these third-party Java script code snippets, it always looks really messed up. And when I first did it for ARPA, that's the client, it didn't look pretty. It didn't look pretty, and that's partially because those snippets, they regurgitate their own custom code or custom CSS and everything like that. So what I ended up doing was just finding what all that custom code was and just making sure that I have the overrides, so it looks like it's part of the site.

**Emily Lewis:** But it created more work for you.

**Lea Alcantara:** Yes, it did. It did create more work for me to design, just to make sure that it matches the site and the form fields look exactly like the other form fields and things like that, and just kind of finding what styles they are because usually another problem with widgets is that there is like five classes to one input.

**Emily Lewis:** [Laughs]

**Lea Alcantara:** So you are just trying to figure out which class is it that's going to change the look and feel of this piece of text and you just kind of have to experiment to see if it changes until that happens. So it is time consuming.

**Emily Lewis:** Right.

**Lea Alcantara:** The flipside of that, and this is another reason why you might want to use a third-party service to do different things and just integrate it with EE, is that all the data is being gathered if you are using SurveyGizmo, and since their main focus is surveys, they have a lot and bigger feature set for those that need that.

**Emily Lewis:** Right, and then I imagine that part of that feature set that's appealing is the reporting, the taking the data and then generating useable reports and information for your client.

**Lea Alcantara:** Yeah, absolutely, and at least for SurveyGizmo as well, they also have an e-commerce component. So what they liked with SurveyGizmo is they are actually using it for registration forms, so they can gather all the data of like their registrants and everything like that as well as get the billing info.

**Emily Lewis:** Oh, that's nice.

**Lea Alcantara:** Yeah, yeah.

**Emily Lewis:** I did want to mention, I have used Wufoo before, and it's for forms and surveys so it could be just generic forms and surveys, and I've never done it in terms of integrating it into a site. I've done it as a standalone survey that you email a link to people and they complete a survey.

**Lea Alcantara:** Yeah.

**Emily Lewis:** But what I like about it was it's really easy to set up if you need to do a quick survey. For example, I've used it for the past couple of years for the user group I run to do an end of the year survey to just feel like how are we doing, and it's really, really, really easy to set up. It's really easy to customize to your own brand, logo, colors and everything, and it has a really good reporting feature after you've gathered your data.

**Lea Alcantara:** Yeah, cool. It's cool.

**Emily Lewis:** I did want to mention while we are on the topic of surveys and quizzes. From what I had gathered from my research, there is just a couple of best practices that people should consider, or at least make your clients aware of.

**Lea Alcantara:** Sure.

**Emily Lewis:** Because I know that sometimes we don't always have the power to convince our clients with everything once they have got it in their mind, but we can educate them about when you are building a survey, especially if you don't

have an incentive for someone to complete it, that you can build your survey in a way that keeps people engaged. First of all, keep it short.

**Lea Alcantara:** Yeah.

**Emily Lewis:** And that means, you need to figure out what your questions are early on in the process to sort of keep them straightforward to the point and getting the information you are ultimately looking for. Another thing, I don't know if you've ever encountered a survey with those matrix questions, where it's like a table of different radio buttons.

**Lea Alcantara:** Yeah.

**Emily Lewis:** Oh...

**Lea Alcantara:** Yeah, usually they are like choose it from one to five, or there is like different ones. Yeah, yeah.

**Emily Lewis:** Almost everything I read said to avoid those matrix questions or grid questions because almost every research that's been done, people will almost always bail on those because not only is it almost overwhelming from when you get on that page and you are like, "Oh, I've got to answer all of these?" But it's also a usability challenge if you haven't built your radio buttons to have a large enough target area and things like that, so avoiding matrix questions. I've already mentioned limiting open-ended questions, but often surveys ask demographic questions like your age range and your gender. They suggest that you keep those at the end because users sort of have been trained to think those are the last questions, so if you put them at the beginning or the middle it may throw users off and they may bail on those surveys sooner than you expect. And then the last thing I found was interesting. It makes sense to me as a user is to hide progress indicators if you have a long survey.

**Lea Alcantara:** Yeah.

**Emily Lewis:** So that people don't see that they've got a long way to go.

**Lea Alcantara:** Yeah, yeah. For sure, for sure. Sometimes, I've taken surveys where they actually tell you, "Oh, set aside ten minutes," and then you just go, "Oh, forget it."

**Emily Lewis:** Exactly.

**Lea Alcantara:** You just told me how long, like even though I guess in the grand scheme of things, ten minutes isn't that much. But if you want me to even start, I don't know, but you telling me how much it's going to be taking time off my day, maybe not.

**Emily Lewis:** Right. Yeah, I think it's important, and not only getting it technically set up correctly, so you are properly gathering the data, but thinking and encouraging your clients to think about their audience and users and to make the survey work with that audience. I came across a fantastic blog when I was doing the research for this podcast. It's [ResearchRants.wordpress.com](http://ResearchRants.wordpress.com).

**Lea Alcantara:** Nice.

**Emily Lewis:** And it's a guy, and basically he does research for a living and he just rants about bad research online. What he does is he spends his time taking polls and doing polls and pointing out what people are doing wrong, like what the New York Times did wrong with their latest poll or whatever, and so it was a very tongue in cheek, but practical blog that sort of talks about very narrow specific things that are gone wrong with polls that you can learn from to do things right.

**Lea Alcantara:** Cool, cool. That's pretty cool. Well, right before we wrap up, I was just thinking one of the more important things before we go that we mentioned is privacy and secure data. So if you are going to have someone fill out certain pieces of information that may or may not be sensitive, you have to really consider that when you are choosing ExpressionEngine to integrate with the surveys or maybe this is part of the reason why a third-party solution is better because they already have a lot of that privacy and certificates to deal with that. Another thing to think about is do you have a privacy statement on your website. Even if you are not doing surveys, sometimes I think this is also already default, even if you've got like a contact us page, you generally have to mention that your privacy is important, especially if you've got a mailing list or things like that. And I think that's just best practices for a general website. Whenever you are gathering personal information, even if it seems as innocuous as an email, that is a privacy issue and you need to mention that to people. Like I was just looking at some of your research notes, mentioning what will happen to the results, I think, is really, really important and I think that's also something that some clients seem to forget to mention as well that if we are going to be gathering all this information, what's going to happen to it?

**Emily Lewis:** Yeah, I think that's an excellent point, particularly if your client is going to disclose any of those survey results to a third-party.

**Lea Alcantara:** Yes.

**Emily Lewis:** To maybe another organization or another association or whatever you need to disclose that.

**Lea Alcantara:** Yeah, absolutely. So I think we've reached the end of our episode.

[Music]

**Lea Alcantara:** So I'd like to thank our sponsors for this podcast, EECI 2011 and Pixel & Tonic.

**Emily Lewis:** We would also like to thank our partners, EllisLab, EngineHosting and Devot:ee.

**Lea Alcantara:** And thanks to our listeners for tuning in. If you want to know more about the podcast, make sure you follow us on Twitter @eepodcast or visit our website at [ee-podcast.com](http://ee-podcast.com). This is Lea Alcantara.

**Emily Lewis:** And Emily Lewis.

**Lea Alcantara:** Signing off for the ExpressionEngine Podcast. See you next time.

**Emily Lewis:** Cheers.