

Client Contact List Tutorial

Your Company Information				Survey Recipient Information (YOUR CLIENTS' INFORMATION)								Your Company Information		
brand	partner	practice area	location	audience	contact_company	contact_name	contact_name	contact_email	contact_sms	contact_phone	email_signature_name	email_signature_title	defractor_notification	
ABC Legal Firm	Jim Prestley	Antitrust	Portland	Client	Nike	Jane Doe	JaneDoe@Nike.com	617-867-5309	617-867-5309	Eric Jones	Partner	EJones@yourfirm.com		
ABC Legal Firm	Maria Stone	Intellectual Property	Portland	Client	Coca Cola	Paul Allen	Paulen@CocaCola.com	212-879-6541	212-879-6541	Nathan Anderson	Partner	NAnderson@yourfirm.com		
ABC Legal Firm	Susan Fields	Commercial Litigation	San Francisco	Client	Intel	Ava Smith	AvaSmith@intel.com	503-698-8595	503-698-8595	Mar Johnson	Partner	MJohnson@yourfirm.com		

REQUIRED

BRAND: Please utilize this column to put YOUR COMPANY name as you would like it shown within the survey and email invitation.

If you have multiple brands, please input the appropriate brand name per client contact.

OPTIONAL

PARTNER: Use this column to differentiate between your different shareholders or partners at your company.

OPTIONAL

PRACTICE AREA: Use this column to differentiate between your different practice areas/services that you operate within.

OPTIONAL

LOCATION: Use this column to differentiate between the different office locations at your company.

REQUIRED

Audience: Please input "Client" for each survey recipient.

OPTIONAL (highly recommended)

COMPANY: Please input the name of your client's company in this column.

REQUIRED

FNNAME & LNAME: Please input your client's first and last name in these separate columns.

REQUIRED

EMAIL: Email will be the primary form of contact and must be included for your client to receive a survey.

OPTIONAL

SMS PHONE: Input the mobile phone number if you are planning on sending the survey via SMS/text. The survey will send a text message to the phone number and the contact_email provided.

OPTIONAL

PHONE: Input the phone number to make it easy to follow up with your clients by phone if they have not taken the survey.

REQUIRED

EMAIL SIGNATURE NAME: A personalized email invitation will be sent to your clients asking them to take the survey. This column includes the name of the person on staff at your company who will electronically sign the personalized email invitation. This should be a person who your client recognizes.

OPTIONAL (highly recommended)

EMAIL SIGNATURE TITLE: The title of the person that appears in EMAIL SIGNATURE NAME is input here. This is used in the email invitation as part of the electronic signature.

OPTIONAL (highly recommended)

DEFRACTOR NOTIFICATION: This is the email address of the person at your company who will receive a notification alert if your client scores you a 6 or lower.