

Client Contact List Tutorial

Your Company Information				Survey Recipient Information (YOUR CLIENTS' INFORMATION)								Your Company Information		
brand	broker	service type	location	audience	contact_company	contact_name	contact_name	contact_email	contact_sms	contact_phone	email_signature_name	email_signature_title	director_notification	
ABC Accounting Firm	Jim Presley	employee benefits	Portland	Client	Nike	Jane	Doe	<a href="mailto:JaneDoe@Nike.com">JaneDoe@Nike.com</a>	617-867-5309	617-867-5309	Eric Jones	Partner	<a href="mailto:EricJones@yourfirm.com">EricJones@yourfirm.com</a>	
ABC Accounting Firm	Maria Stone	property and casualty	Portland	Client	Coca Cola	Paul	Allen	<a href="mailto:PaulAllen@CocaCola.com">PaulAllen@CocaCola.com</a>	212-879-6541	212-879-6541	Nathan Anderson	Partner	<a href="mailto:NathanAnderson@yourfirm.com">NathanAnderson@yourfirm.com</a>	
ABC Accounting Firm	Susan Fields	retirement	San Francisco	Client	Intel	Ava	Smith	<a href="mailto:AvaSmith@Intel.com">AvaSmith@Intel.com</a>	503-686-8595	503-686-8595	Mar Johnson	Partner	<a href="mailto:MarJohnson@yourfirm.com">MarJohnson@yourfirm.com</a>	

**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**

**BROKER:** Use this column to differentiate between your different shareholders or brokers at your company.

**OPTIONAL**

**SERVICE TYPE:** Use this column to differentiate between your different practice areas/services that you provide.

**REQUIRED**

**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**

**FNAM & 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 "first name" you recognize.

**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)

**DETRACTOR 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.