

Client Contact List Tutorial

Your Company Information			Survey Recipient Information (YOUR CLIENTS' INFORMATION)							Your Company Information		
brand	location	portfolio leader	audience	contact_company	contact_name	contact_lname	contact_email	contact_sms	contact_phone	email_signature_name	email_signature_title	deductor_notification
ABC Fm	San Diego	Sally Fields	Client	Nike	Jane	Doe	janeDoe@nike.com	617-867-6309	617-867-6309	Sally Fields	Account Manager	SJones@abcfm.com
ABC Fm	Portland	Harrison Ford	Client	Coca Cola	Paul	Allen	PAllen@CocaCola.com	212-879-6541	212-879-6541	Harrison Ford	Account Manager	Harrison@abcfm.com
ABC Fm	Seattle	Joan Crawford	Client	Intel	Ava	Smith	AvaSmith@intel.com	503-698-8595	503-698-8595	Joan Crawford	Account Manager	JMcMahon@abcfm.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
(highly recommended)*

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

*very important for ratings on profile page if you have more than one location.

OPTIONAL

PORTFOLIO LEADER:
Use this column to differentiate between the different Portfolio Leaders that maintain the relationship with that account. This may or not be the person that is used as the email signature name.

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

FNAME & 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 this 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 will 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 your company a 6 or lower.