

Instant Census Text Message Surveys

What Is Instant Census?

- Automated text message survey software
- Survey builder tool
- Panel management
- Real-time data visualization and reporting



How It Works

- Survey participants interact with Instant Census as if they were holding a text message conversation with a real person:
 - Instant Census texts a question
 - The participant texts an answer
 - Instant Census parses the answer and determines how to follow-up



Response Rates and Times

- Higher response rates and faster response times than other traditional survey tools
- 50% response rate in 1 ½ minutes of survey deployment with an 85% overall response rate for compensated survey participants

Instant Census Admin Portal

*Screen shots of the Instant Census Admin
Portal and Survey Builder Tool*



Accessing The Admin Portal

Instant Census Login Screen

Welcome to Instant Census!

Please log in to use Instant Census.

Email

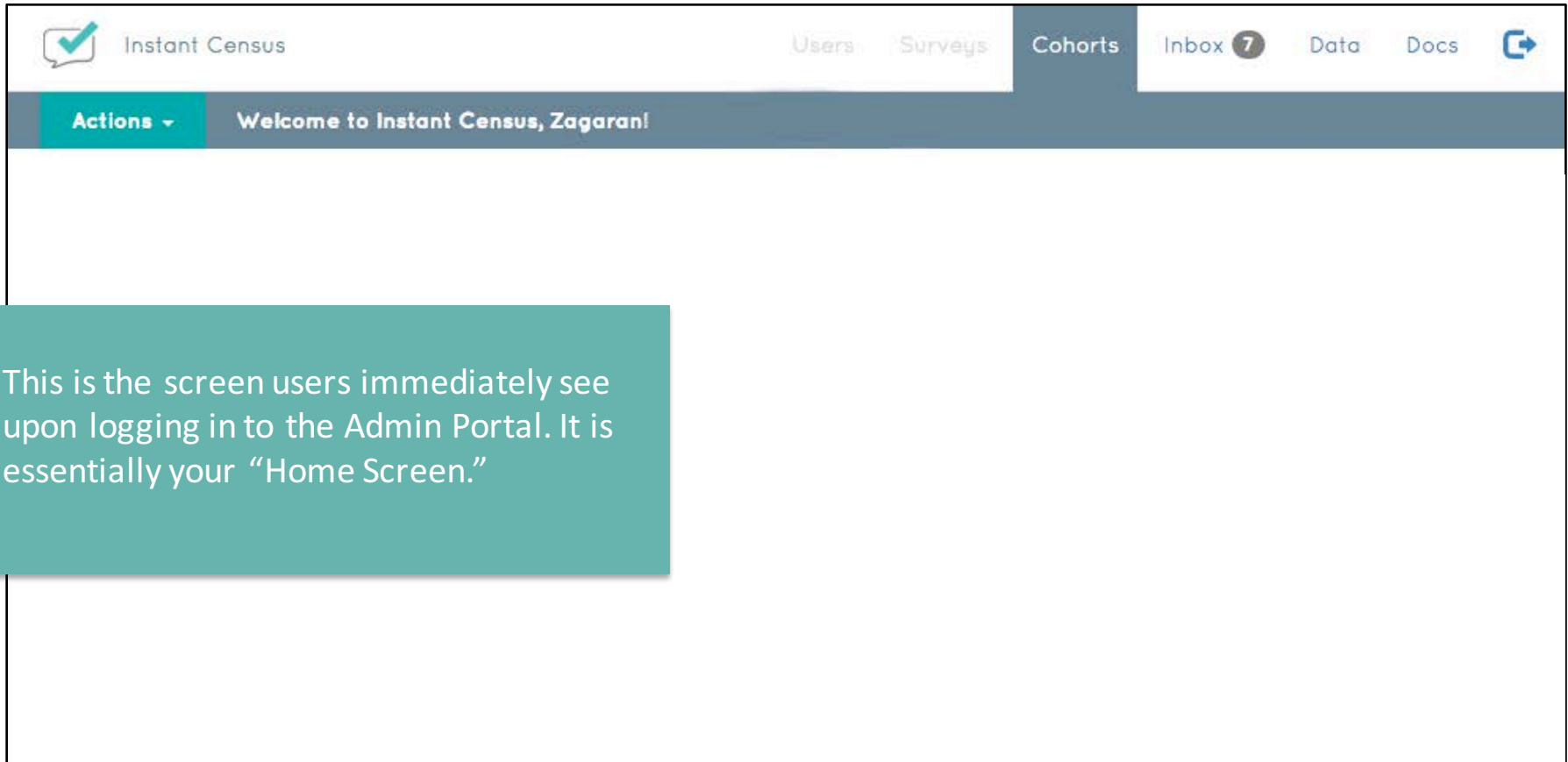
Password

Log In

[Forgot password?](#)

This is the login page of the web portal where users enter login credentials and access the Instant Census Admin Portal and Survey Builder Tool.

Admin Portal Landing Page



This is the screen users immediately see upon logging in to the Admin Portal. It is essentially your “Home Screen.”



Creating A New Cohort

Adding A New “Cohort”



To begin building a survey, click the “Actions” drop down menu and select “Add Cohort.” Cohorts, which are like projects, are where users build and schedule surveys and add and remove survey participants.

Adding A New “Cohort” Cont’d

Next, the “Add Cohort” pop-up window will appear, prompting users to add specific information to their new Cohort, such as:

1. **Cohort name** (internal use only)
2. **Welcome message** that includes opt-out instructions per FCC regulations
3. **Inactive limit** which states how many times a message should be resent to an unresponsive survey participant
4. **Area code** for the survey phone number

Add Cohort

Cohort Name: Enter cohort name here

Welcome Message:
Welcome to Instant Census.
Text 'STOP' to end messages at any time.
Standard msg&data rates may apply.

Inactive Limit: 5

Desired Area Code: (optional) Enter desired area code here

Cancel Okay

Adding And Managing Survey Participants

Survey Participant Management Landing Page

Instant Census

Users Surveys Cohorts Inbox 7 Data Docs

Actions Cohort Name: "Test Cohort 1"

There are currently no users for this cohort.
Click "Add User" in the above "Actions" dropdown menu to create a new user.

Show 25 entries Search:

Phone Number	Status	Timezone

Showing 0 to 0 of 0 entries

Once a new Cohort is created, users are taken to the Survey Participant Management page where survey participants are managed and stored in the chart shown here. You can return to this page by selecting the "Users" tab in the top toolbar .

Adding Survey Participants

The screenshot displays the Instant Census web application interface. At the top, there is a navigation bar with tabs for 'Users', 'Surveys', 'Cohorts', 'Inbox 7', 'Data', and 'Docs'. Below this, a dark blue header bar shows 'Actions' and 'Cohort Name: "Test Cohort 1"'. A yellow banner below the header contains the text: 'Add User', 'Add User Attribute', 'Download Users Data', and 'Upload User Spreadsheet'. A red arrow points to the 'Add User' option in the dropdown menu. Below the banner is a search bar and a table with columns for 'Phone Number', 'Status', and 'Timezone'. The table is currently empty. At the bottom right of the table, there are 'Previous' and 'Next' navigation buttons.

To add survey participants to the Survey Participant Management chart, select “Add User” from the “Actions” drop down menu.

Adding Survey Participants Cont'd

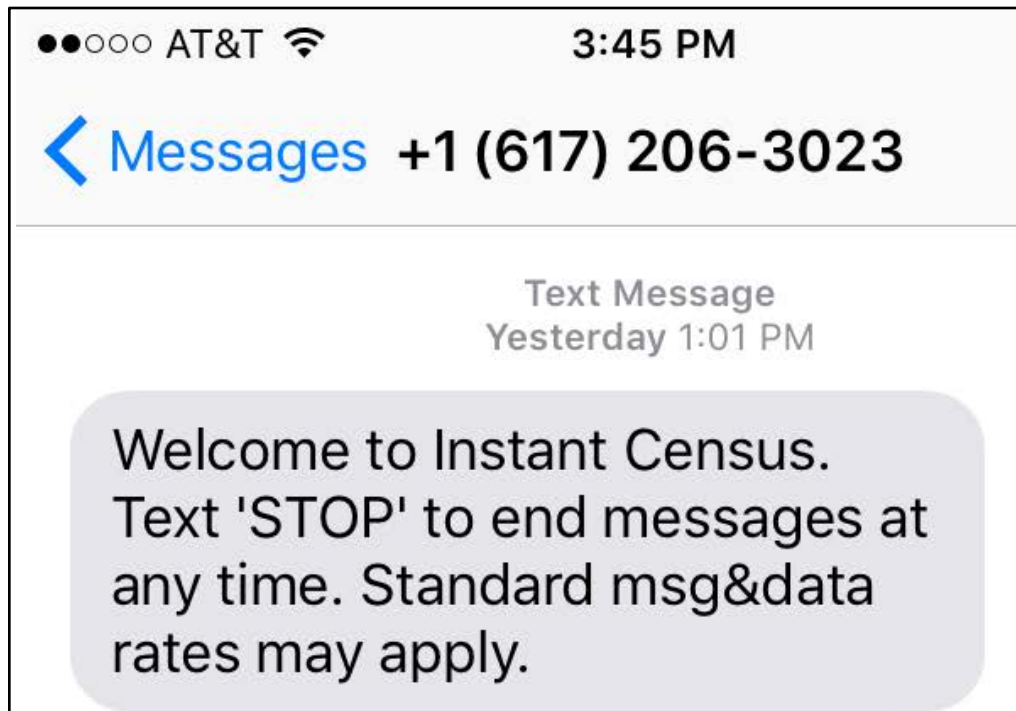
The screenshot shows the 'Add User' pop-up window in the Instant Census application. The window is titled 'Add User' and has a close button (X) in the top right corner. Inside the window, there is a 'Phone Number:' label followed by a text input field containing the placeholder text 'Enter phone number here' and an asterisk icon. At the bottom right of the window, there are two buttons: 'Cancel' and 'Add User'. The background shows a blurred interface with a 'Cohort Name: Test C' and a table with 'Phone Number' columns. A yellow banner at the top of the background interface reads 'There are currently no users for this cohort. Click "Add User" in the above "Actions" menu to add users to this cohort.' Below the banner, there is a 'Show 25 entries' dropdown and a search bar.

The “Add User” pop-up window is where phone numbers of individual survey participants are manually entered. Users can also import an Excel spreadsheet or CSV file of several survey participants and phone numbers at once. Once survey participants are added, their information will appear in the Survey Participant Management chart.

Welcome Message



Welcome Message



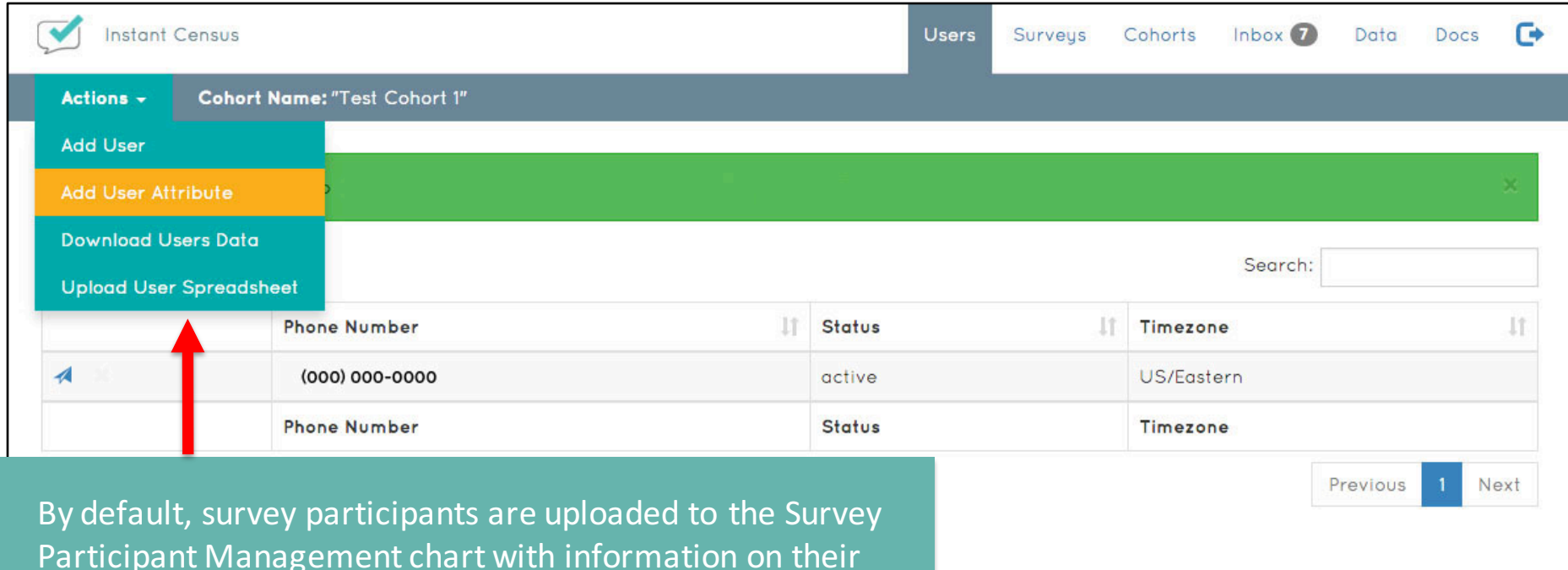
According to FCC regulations, all survey participants must receive a welcome message with opt out instructions and information on standard message and data rates.

Instant Census handles this for users with our standard welcome message which is sent to all survey participants upon opting into our surveys.



Adding User Attributes

Adding User Attributes



The screenshot shows the 'Instant Census' interface with the 'Users' tab selected. The 'Actions' dropdown menu is open, and 'Add User Attribute' is highlighted in orange. A red arrow points to this option. The 'Cohort Name' is 'Test Cohort 1'. Below the menu is a table with columns for 'Phone Number', 'Status', and 'Timezone'. The first row contains '(000) 000-0000', 'active', and 'US/Eastern'. A search bar and pagination controls are also visible.

Phone Number	Status	Timezone
(000) 000-0000	active	US/Eastern

By default, survey participants are uploaded to the Survey Participant Management chart with information on their status and time zone. If you'd like to add additional information about your participants, click "Add User Attribute" from the "Actions" drop down menu.

Adding User Attributes Cont'd

Instant Census

Actions Cohort Name: "Test C

Success! New user with phone num

Show 25 entries

	Phone Num
	(000) 000
	Phone Num

Showing 1 to 1 of 1 entries

Search:

zone

astern

zone

Previous 1 Next

Add User Attribute

Attribute Name: *

Default Value:

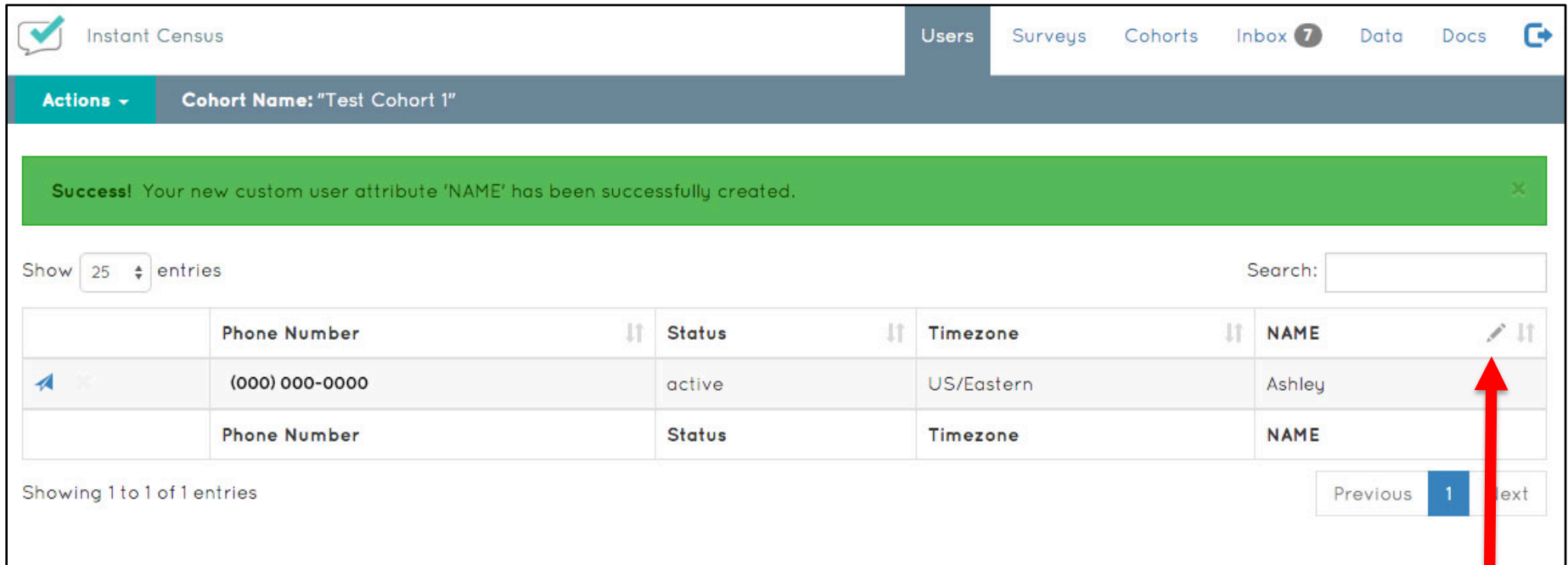
Note: The default value is the attribute value assigned to a user at creation. It is strongly encouraged that a non-blank default value is assigned. This is especially important when this attribute is used in a text message as a custom merge field.

[View example...](#)

Cancel Add User Attribute

The “Add User Attribute” pop-up window is where attribute information is entered and then placed in the Survey Participant Management chart. For example, if you want to store survey participant names, you could enter “Name” into the “Attribute Name” field and “None” in the “Default Value.”

Adding User Attributes Cont'd



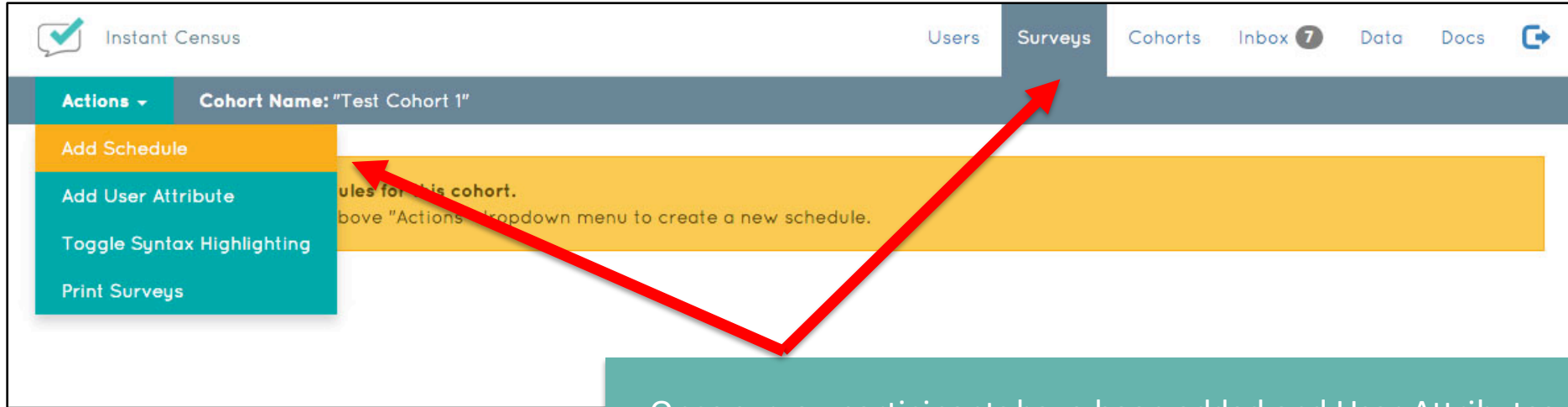
The screenshot shows the Instant Census interface. At the top, there's a navigation bar with 'Instant Census' on the left and 'Users', 'Surveys', 'Cohorts', 'Inbox 7', 'Data', and 'Docs' on the right. Below this is a dark blue header with 'Actions' and 'Cohort Name: "Test Cohort 1"'. A green success message banner reads: 'Success! Your new custom user attribute 'NAME' has been successfully created.' Below the banner, there's a 'Show 25 entries' dropdown and a search box. A table displays user attributes with columns: Phone Number, Status, Timezone, and NAME. The first row shows '(000) 000-0000', 'active', 'US/Eastern', and 'Ashley'. A red arrow points to a pencil icon in the NAME column. Below the table, it says 'Showing 1 to 1 of 1 entries' and has 'Previous', '1', and 'Next' buttons.

Phone Number	Status	Timezone	NAME
(000) 000-0000	active	US/Eastern	Ashley

Once added, the new User Attribute will appear in the Survey Participant Management chart as a new column. You can directly edit attributes for any particular survey participant by clicking the pencil icon.

Adding A Schedule (Survey)

Adding A Schedule (Survey)



The screenshot shows the Instant Census web application interface. At the top, there is a navigation bar with tabs for 'Users', 'Surveys', 'Cohorts', 'Inbox' (with a notification badge of 7), 'Data', and 'Docs'. Below the navigation bar, the 'Actions' dropdown menu is open, displaying options: 'Add Schedule', 'Add User Attribute', 'Toggle Syntax Highlighting', and 'Print Surveys'. The 'Add Schedule' option is highlighted in orange. A red arrow points from the 'Add Schedule' option to the 'Surveys' tab in the navigation bar. Another red arrow points from the 'Add Schedule' option to the 'Actions' dropdown menu. The background of the interface is a light blue color.

Once survey participants have been added and User Attributes are in place, it's time to add a survey and a schedule. Choose the "Surveys" tab in the top toolbar and click the "Add Schedule" option from the "Actions" drop down menu.

Schedule Options

Instant Census

Actions - Cohort Name: "Test C

There are currently no schedules for this cohort. Click "Add Schedule" in the above message to create a new schedule.

Add Schedule

Recurring One-Time On User Creation

This schedule type sends recurring surveys on the days of week and times specified below.

Send survey on:

- Sunday
- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday

Send questions at: Noon local time ?

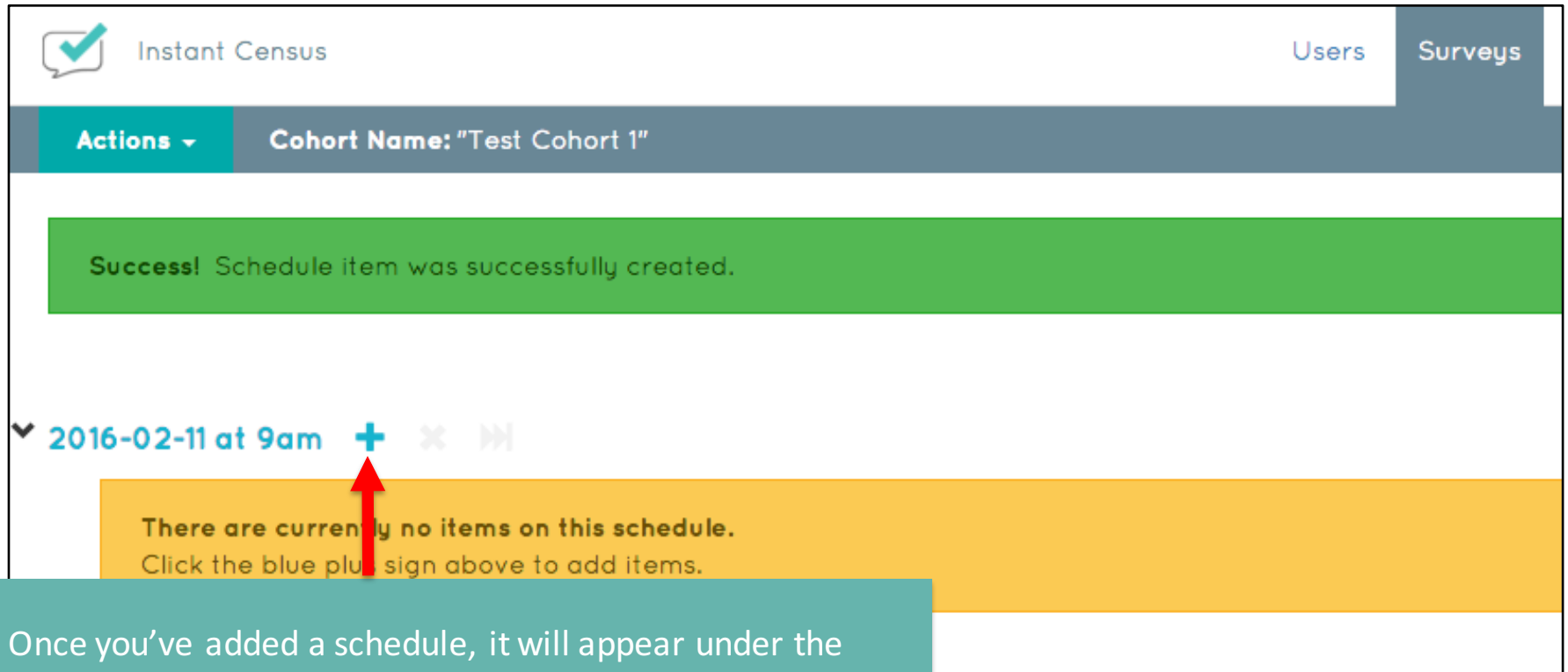
Resend questions if users do not respond to questions?

Cancel Add Schedule

Instant Census offers several types of scheduling options for surveys. Surveys can be sent on a recurring schedule, one-time schedule, and an on user creation schedule (meaning a survey is sent immediately after a new survey participant opts into Instant Census).

Building A Survey

Building A Survey



The screenshot shows the Instant Census interface. At the top left is the Instant Census logo. On the right, there are tabs for "Users" and "Surveys". Below the tabs is a header bar with "Actions" and "Cohort Name: 'Test Cohort 1'". A green success message reads "Success! Schedule item was successfully created." Below this, a schedule item is listed as "2016-02-11 at 9am" with a blue plus icon, a grey X icon, and a grey double arrow icon. A yellow message box below the schedule item says "There are currently no items on this schedule. Click the blue plus sign above to add items." A red arrow points to the blue plus icon.

Once you've added a schedule, it will appear under the "Surveys" tab. You are now ready to add questions and build your survey. To add questions to your survey click the blue + icon next to the schedule day/time.

Question Types

Add New Item

Question Message Conditional Set Attribute

This action adds a new question to send to the user.

Question Text:

Question Type:

Cancel Add New Item

Upon clicking the + icon, the “Add New Item” pop-up window will appear. From here, users can choose from a variety of question and message types. Users may also set conditionals and attributes.

Question Types Cont'd

Add New Item

Question Message

This action adds a new question to send to the user.

Question Text:

Question Type:

- ✓ Open-Ended
- Yes/No
- Multiple Choice
- Numeric

Cancel Add New Item

Instant Census question types include open-ended, multiple choice, numeric, and yes or no. Question types are selected from the "Question Type" drop down menu.

Question Types Cont'd

Add New Item

Question **Message** Conditional Set Attribute

This action adds a new message to send to the user.

Message Text:

Cancel **Add New Item**

Users can also send messages that do not solicit a response. These may be "Thank You" messages or notifications.

Conditionals

Users can also set conditionals to survey logic from the “Add New Item” pop-up. Through conditionals, users can determine which survey questions should be sent according to what answers are provided.

Add New Item

Question Message **Conditional** Set Attribute

This action adds a condition to your survey logic

If is Value

Cancel Add New Item

Setting Attributes

Attributes are also set from the “Add New Item” pop-up. Here users can set user attributes as a part of survey logic.

Add New Item

Question Message Conditional **Set Attribute**

This action sets user attributes as part of your survey logic.

Set to

Cancel **Add New Item**

Survey Example

Additional questions, messages, conditionals, and attributes are added to a survey by clicking the + icon next to an already added message or question.

Once survey questions and logic are in place, a complete visual of the survey will appear under the “Surveys” tab for each specific Cohort.

To disregard the scheduled time and deploy a survey immediately after it’s creation, click the fast forward icon next to the survey date/time.

Instant Census

Actions Cohort Name: "Test Cohort 1"

Success! Schedule item was successfully created.

2016-02-11 at 9am + × ⏩

Send Message: Hello, [[Name]]! Are you ready to answer a few questions? + ×

Send Question: What time did you eat lunch today? (Open-Ended) + ×

Send Question: Did you eat any of the following for lunch today? (Multiple Choice. Valid Answers: Salad; Sandwich; Pizza; None of these;) + ×

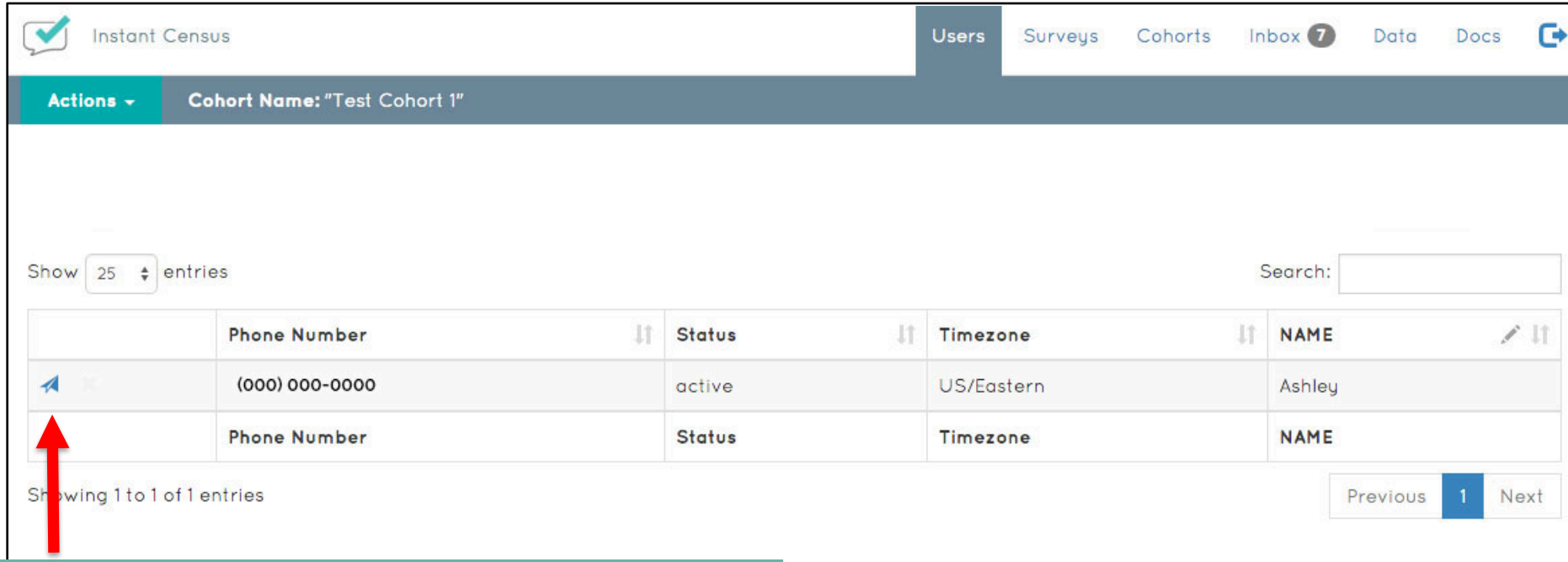
IF (ANSWER) is Pizza + ×

Send Question: What kind of pizza did you have? (Open-Ended) + ×

Send Message: Thanks for your participation! + ×

Message Center

Message Center




Instant Census

Users Surveys Cohorts Inbox 7 Data Docs

Actions Cohort Name: "Test Cohort 1"

Show 25 entries Search:

	Phone Number	Status	Timezone	NAME
	(000) 000-0000	active	US/Eastern	Ashley
	Phone Number	Status	Timezone	NAME

Showing 1 to 1 of 1 entries

Previous 1 Next

To view the message history for any survey participant, return to the “Users” tab in the top toolbar and click the paper airplane icon next to a particular survey participant’s phone number.

Message Center

Instant Census

History Users Surveys Cohorts **Inbox 7** Data Docs

Actions Cohort Name: "Test Cohort 1"

Main Attributes

- Cohort: Test Cohort 1
- User Phone:
- System Number:
- Currently in active survey?: No
- Unhandled Messages: 0

Other Attributes

- User ID: 56ba26b125c89e7466d9d9a6
- Status: active
- Create Time: Tue, Feb 9, 2016 12:49:37PM EST

Message History

Tue, Feb 9, 2016 1:01:41PM EST

Welcome to Instant Census. Text 'STOP' to end messages at any time. Standard msg&data rates may apply.

Tue, Feb 9, 2016 1:02:14PM EST

Hello, Ashley! Are you ready to answer a few questions?

Tue, Feb 9, 2016 1:02:19PM EST

What time did you eat lunch today?

Tue, Feb 9, 2016 1:02:32PM EST

12pm

Tue, Feb 9, 2016 1:02:37PM EST

Did you eat any of the following for lunch today?

Tue, Feb 9, 2016 1:03:07PM EST

Pizza

Tue, Feb 9, 2016 1:03:12PM EST

Send

In the message center, users can view the message history with a particular survey participant. Any messages that require review are flagged with an orange dot and appear in the "Inbox" tab.

Users can directly respond to survey participants using the message sender feature.

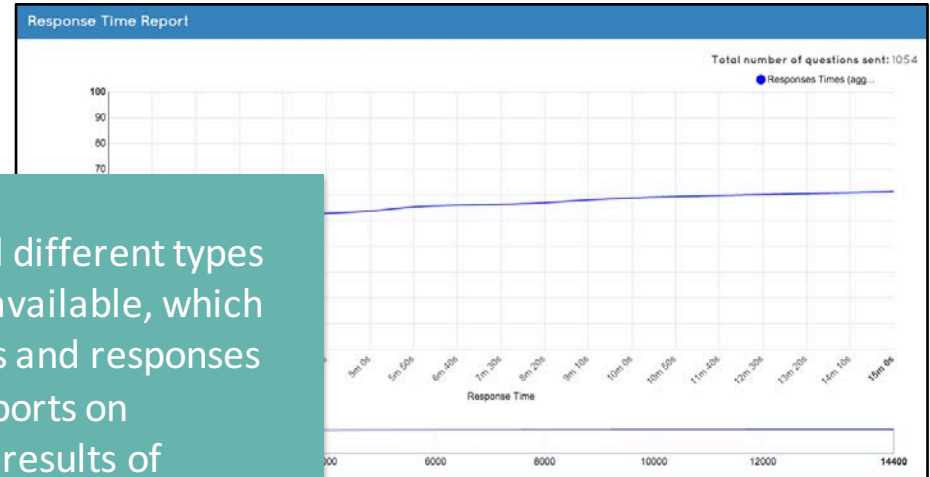
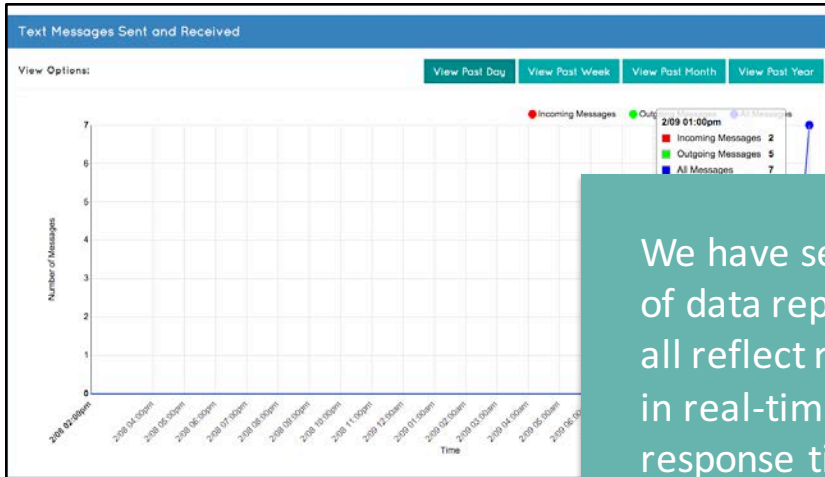
Accessing Data

Accessing Data

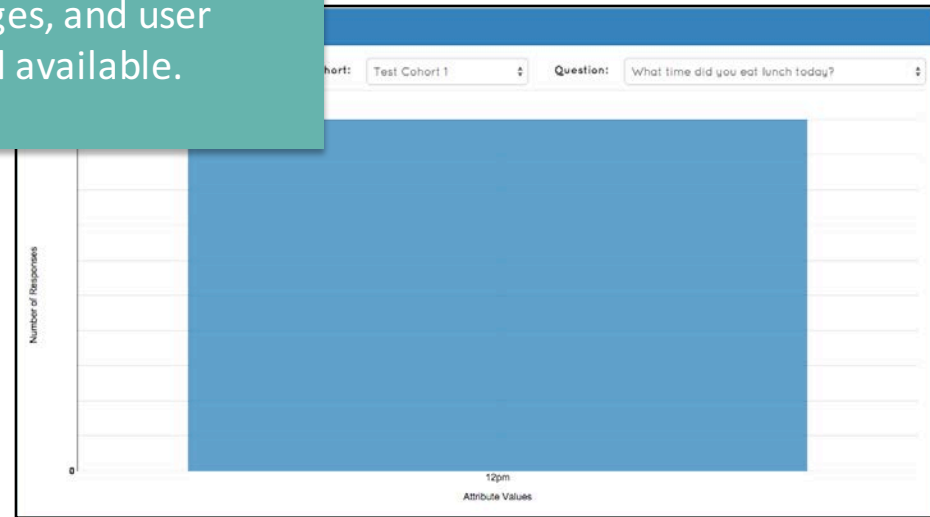
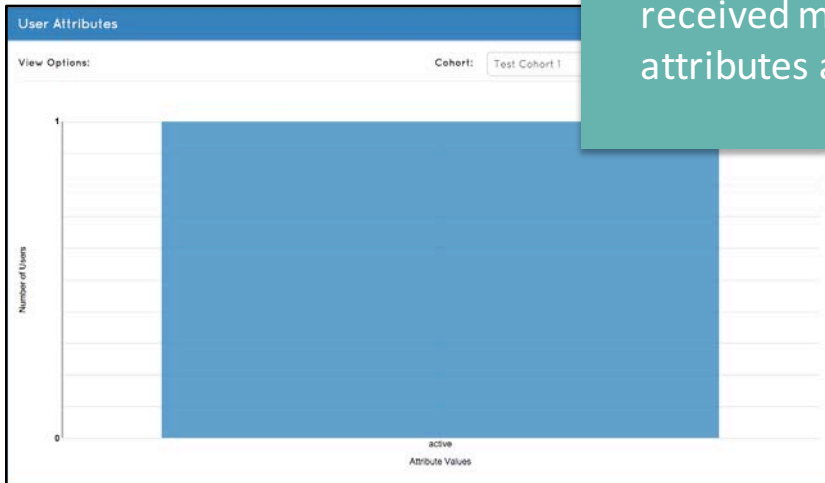
The screenshot displays the Instant Census dashboard for a cohort named "Test Cohort 1". The top navigation bar includes tabs for Users, Surveys, Cohorts, Inbox (7), Data (highlighted in orange), and Docs. Below the navigation bar, there is an "Actions" dropdown and a "View data reports" button. A green success message states: "Success! Schedule item was successfully created." Below this, a survey deployment timeline for "2016-02-11 at 9am" is shown, containing several items: a message, an open-ended question, a multiple-choice question, a conditional logic rule ("If (ANSWER) is Pizza"), another open-ended question, and a final message. A red arrow points from the "View data reports" button to a teal callout box on the right.

Once a survey is deployed, users can view results and data in the data tab in the top toolbar.

Graphs In Real-Time



We have several different types of data reports available, which all reflect results and responses in real-time. Reports on response times, results of individual questions, sent and received messages, and user attributes are all available.




Downloading Data

Downloading Data

The screenshot shows the 'Cohorts' page in the Instant Census interface. The top navigation bar includes 'Users', 'Surveys', 'Cohorts', 'Inbox 7', 'Data', and 'Docs'. A dark blue banner at the top contains 'Actions' and 'Welcome to Instant Census, Zagaran!'. The main content area is titled 'Cohort' and includes a 'Delete Cohort' link. On the left, a list of cohort statistics is displayed: Users (Active): 5, Users (Total): 7, Users (Needs Review): 4, Total Messages: 2566, Desired Area Code: 617, Inactive Limit: 5, Welcome Message: Welcome to Instant Census. Text 'STOP' to end messages at any time. Standard msg@data rates may apply., Numbers: [blank], and Created on: Wed, Jun 3, 2015 3:36:44 PM EST. On the right, there are several buttons: 'Manage Users', 'Survey Builder', 'Cohort Active', 'Edit Cohort', 'Download Data', and 'Mark As Completed'. A red arrow points to the 'Download Data' button.

Users (Active):	5
Users (Total):	7
Users (Needs Review):	4
Total Messages:	2566
Desired Area Code:	617
Inactive Limit:	5
Welcome Message:	Welcome to Instant Census. Text 'STOP' to end messages at any time. Standard msg@data rates may apply.
Numbers:	[blank]
Created on:	Wed, Jun 3, 2015 3:36:44 PM EST

To download data after your survey participants have completed answering questions, return to the “Cohorts” menu and click the “Download Data” icon. Data is available for download in Excel and CSV formats.



Questions? Contact us.

info@instantcensus.com

