Surveys ask your clients how it went, one question at a time, and bring the answers back to the project. Two come ready-made: one for a deal you did not win, one for an event you just delivered.

Key Features

- **One question per page.** A survey shows one question at a time with a progress bar, Next and Back; a question marked required has to be answered before moving on. Any form can use this: switch on "One question per page" in the form's settings.
- **A lost-deal survey.** When a deal is marked lost, a short survey asks what went wrong: the main reason, whether the price was the issue, how the communication and the proposal were, what would have changed the decision, and whether they would consider you again.
- **An after-the-event survey.** Two days after an event ends, the client is asked how it went: overall, the staff, the photos or videos, the setup, whether everything was on time, how likely they are to recommend you, and what to improve. When your site has AirReview, the survey ends on your reviews page with a button to leave a public review.
- **Sent by themselves.** Both surveys are workflows: once switched on, they go out without you lifting a finger, to the project's primary contact, from your own sending address, with a personal link.
- **Results at a glance.** On the survey's submissions page, every question is rolled up: the average and the spread for ratings, the recommend score, the count for each choice, and the written answers with who said it and on which project.

How to Use

1. Open AirFlow and add the "Lost Deal: What Went Wrong" and "After the Event: Feedback and Review" recipes. They arrive switched off.
2. Open each one, read the steps (a wait, then the survey email), and switch it on.
3. The standard surveys are created in AirForms the first time one goes out. Open them there to change the questions, the wording or the thank-you page; your changes apply to every survey sent afterwards.
4. To send a survey of your own instead, build it in AirForms with the form type "Survey", then pick it in the workflow's "Send Survey" step.
5. Answers appear on the survey's submissions page and on the project's timeline.

Tips

- A survey goes to the project's primary contact. A project without one gets no survey, so set

the contact before the event.

- The lost-deal survey waits a day and the after-the-event one waits two days; change the wait in the workflow if you prefer another delay.
- Mark a deal lost from the project, the pipeline or the leads list: the survey goes out once, whichever you use.
- Your AI assistant can read the results and tell you what clients keep saying.