

## Creating Good Questionnaires

Following best practice when creating your questionnaire can make it easier for respondents to provide the information you need. Here are our top tips for creating good questionnaires that will achieve better results.

Reach out to your primary Client Success point of contact to know more about these features or if you would like us to review your questionnaires.

### Top Tips

- 1 Consider the maximum number of questions in a given questionnaire
- 2 Consider the number of products included in a questionnaire
- 3 Include N/A when using Yes/No radio button questions
- 4 Allow comments on all questions
- 5 Allow additional files to be attached
- 6 Allow responses to be provided after the deadline
- 7 Pre-fill responses where possible
- 8 Allow respondents to edit tables
- 9 Include the Manager Top Tips guide to all questionnaires
- 10 Turn on clarification requests

## 1 Consider the maximum number of questions in a given questionnaire

We advise our clients to carefully consider the maximum number of questions in a given questionnaire. We have seen a good response rate up to 250-300 questions, beyond which the response rate then starts going down.

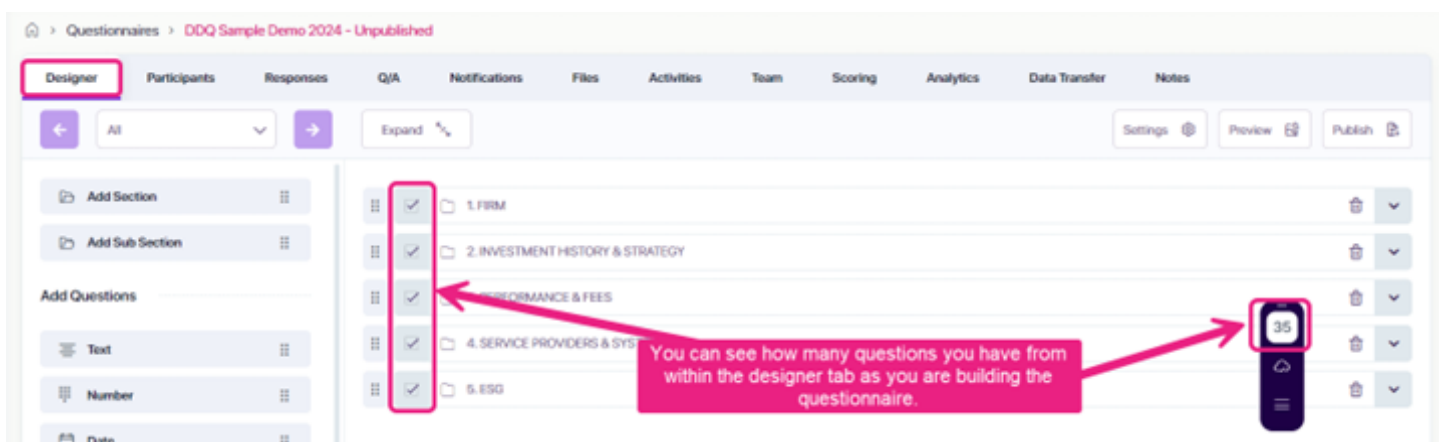
Please note that nested are not included in the total number so you may want to take this into account.

In order to reduce the number of questions, you can use Table Type questions (which can be transferred in Companies or Product profiles, can be pre-filled and can be included in your Due Diligence report)

If you have too many questions in a questionnaire, you might want to consider splitting the questionnaire up into multiple questionnaires to improve user experience.

For example, you could split between Firm and Product specific questionnaires, create a standalone documentation or Key Data questionnaire.

One benefit of splitting them and having shorter questionnaires is that you can set up different deadlines and you can request responses to be received earlier for some of them.

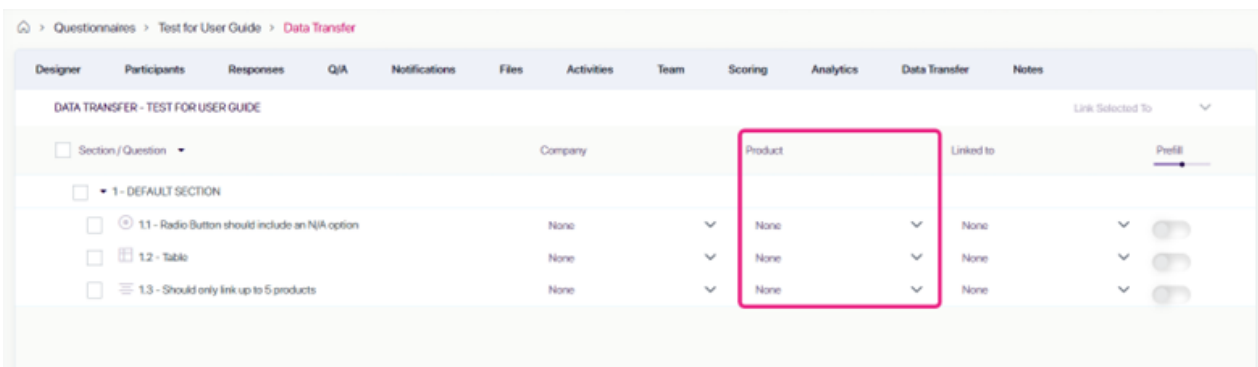


## 2 Consider the number of products in a questionnaire (where you have product-specific questions)

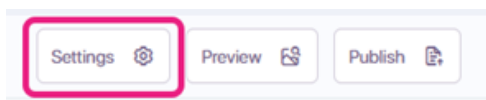
We generally advise clients to limit the number of products added to a questionnaire if certain questions are product linked. If more products need to be added to a questionnaire with product linked questions, we generally advise our clients to use the 'Response Per Product' feature which allows the respondents to individually respond for each product. This will allow the respondents to more easily track and allocate the work internally.

Only relevant for questionnaires where questions are marked as 'Product' questions and therefore duplicated for each product added to the questionnaire.

To the extent that clients need to include more products, we recommend our clients to create a product only questionnaire and to use the Response per Product feature. This will allow the respondents to more easily track and allocate the work internally.



To enable Response Per Product, you will find it within the overall questionnaire settings.



### Settings

Questionnaire Name \*

Test for User Guide

Asset Class

Questionnaire Type

Questionnaire Sub Type

Time Zone

Response Deadline Date \*

05/29/2024 16:05

Auto Invitation Date

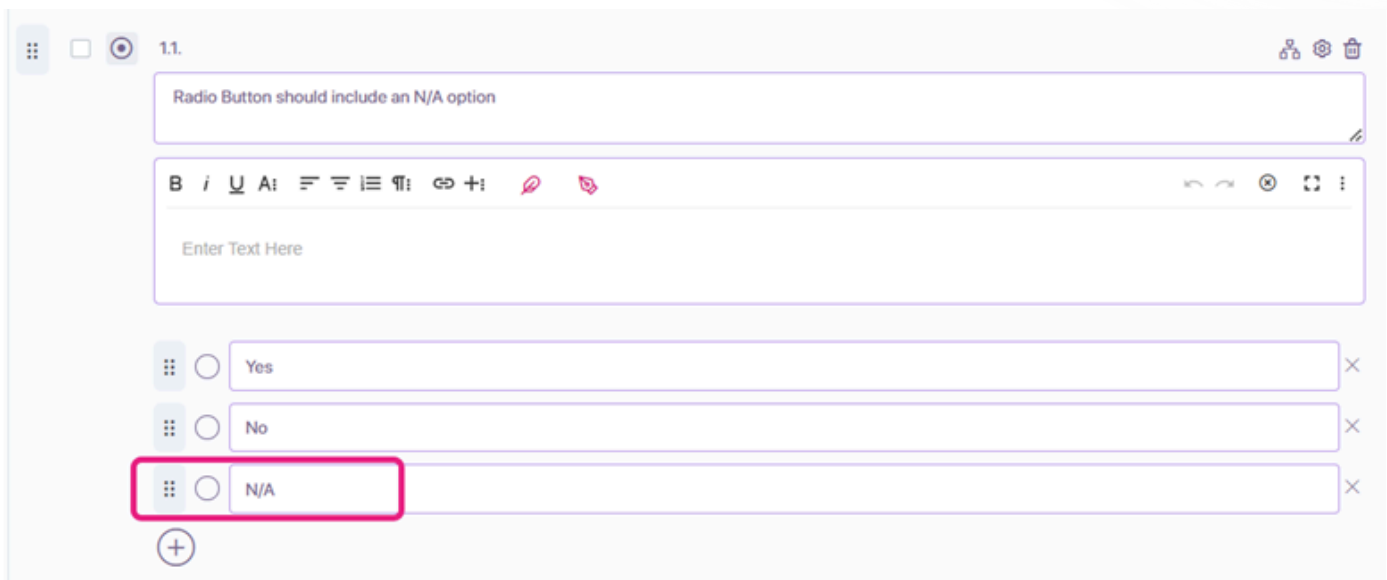
Score Min \*  Score Max \*

Response Per Product

Send one email per company

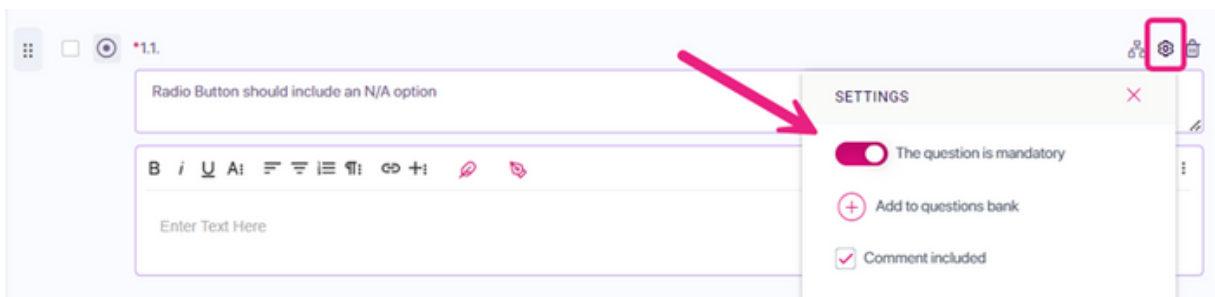
### 3 Include N/A when using Yes/No radio button questions

We generally advise our clients to offer the option to include N/A for any Yes/No questions. If clients choose to only keep Yes or No, we recommend keeping the question as “Not Mandatory” (see below). Please note that if you set all questions as Mandatory at the questionnaire level, all radio button questions will automatically come with an N/A option.



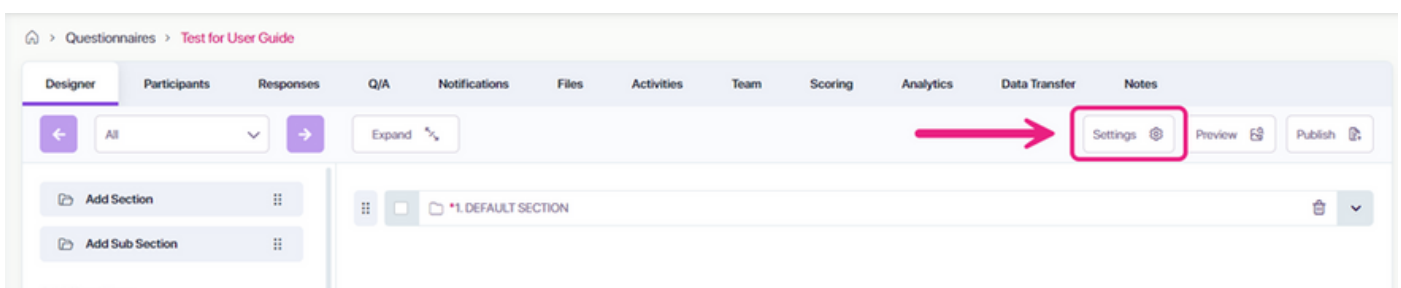
The screenshot shows a question editor interface. At the top, there is a text input field containing "Radio Button should include an N/A option". Below this is a rich text editor with a toolbar and a text area containing "Enter Text Here". Underneath the text area are three radio button options: "Yes", "No", and "N/A". The "N/A" option is highlighted with a red rectangular box. A plus sign icon is visible at the bottom left of the options list.

Please note that a question can be set as mandatory from a question level;



The screenshot shows the same question editor as above, but with the settings panel open on the right. A red arrow points from the question text to the settings panel. The settings panel has a title "SETTINGS" and a close button. It contains three items: a toggle switch for "The question is mandatory" which is turned on, a plus icon for "Add to questions bank", and a checked checkbox for "Comment included". The settings panel title "SETTINGS" is highlighted with a red box.

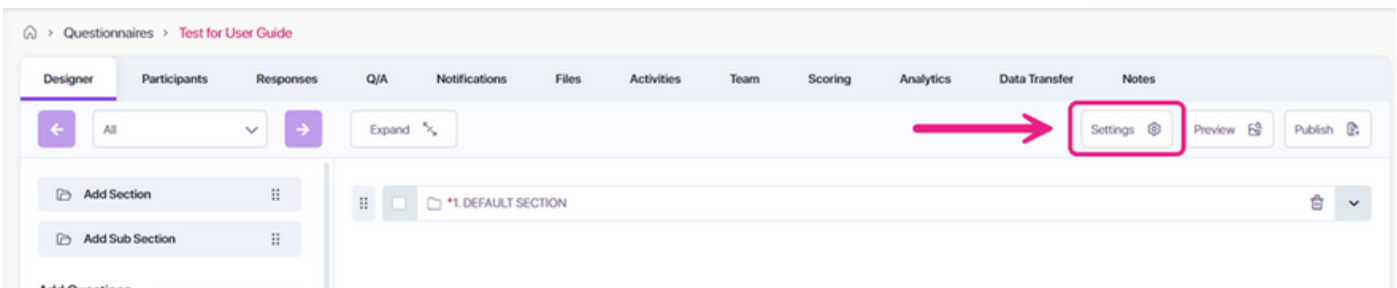
or questionnaire level.



The screenshot shows the main questionnaire designer interface. At the top, there is a navigation bar with tabs for "Designer", "Participants", "Responses", "Q/A", "Notifications", "Files", "Activities", "Team", "Scoring", "Analytics", "Data Transfer", and "Notes". Below the navigation bar is a toolbar with a back arrow, a dropdown menu set to "All", an "Expand" button, and a "Settings" button. The "Settings" button is highlighted with a red box and a red arrow. Below the toolbar is a sidebar with "Add Section" and "Add Sub Section" buttons. The main area shows a section titled "\*1. DEFAULT SECTION".

## continued... Include N/A when using Yes/No radio button questions

We generally advise our clients to offer the option to include N/A for any Yes/No questions. If clients choose to only keep Yes or No, we recommend keeping the question as “Not Mandatory” (see below). Please note that if you set all questions as Mandatory at the questionnaire level, all radio button questions will automatically come with an N/A option.



Once you are within the questionnaire settings you will see the option to set all questions to mandatory.

### Settings

**Invitation Text** 👁️ ▼

**Cc** Enter Email **Bcc** Enter Email

**Description** ▼

Allow Clarification  **All questions are mandatory**

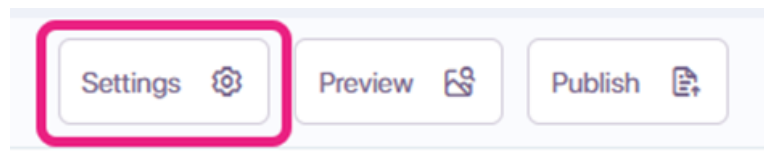
Allow Attachment  Allow submission after deadline

Include Comment to all Questions  Allow partial submit

## 4 Allow comments on all questions

We generally advise our clients to allow for comments to all questions. You can set this to be included for all questions within the settings of the questionnaire.

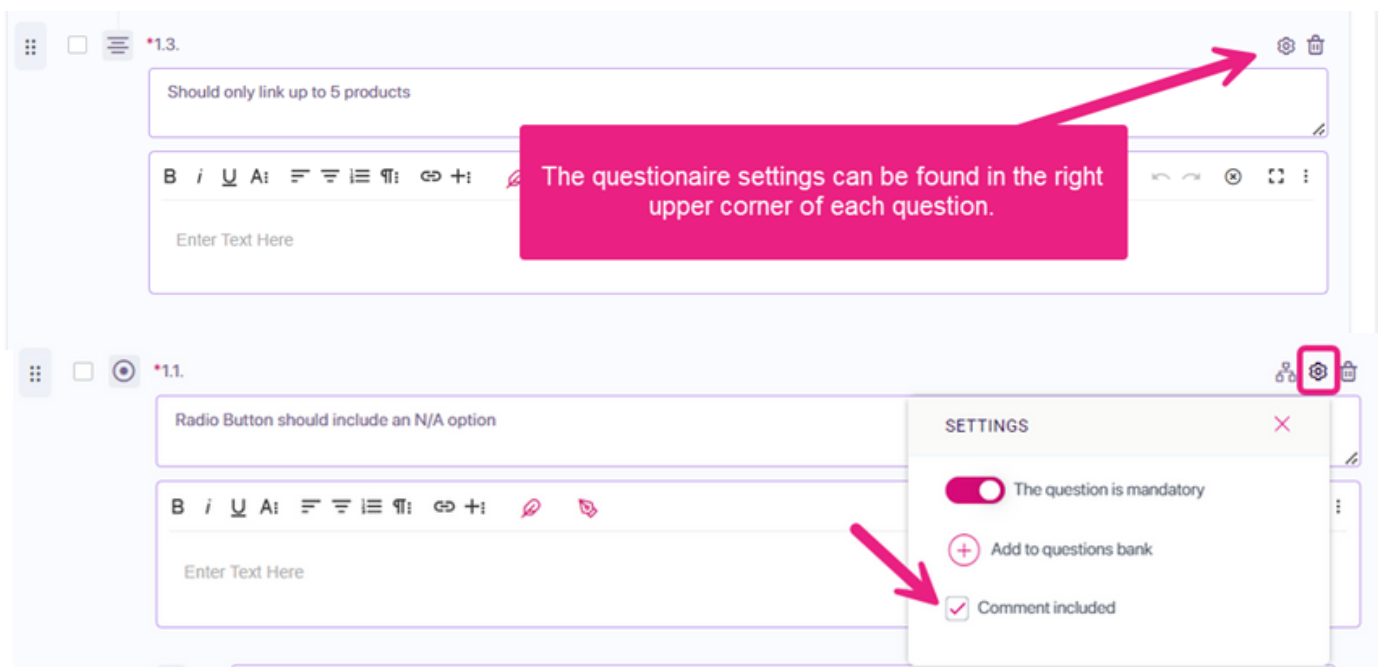
The questionnaire settings are found in the right upper corner.



For example, if you are requesting a response that only allows a number, including a comment box will allow the respondents to provide additional background/details on the calculation, assumptions etc.

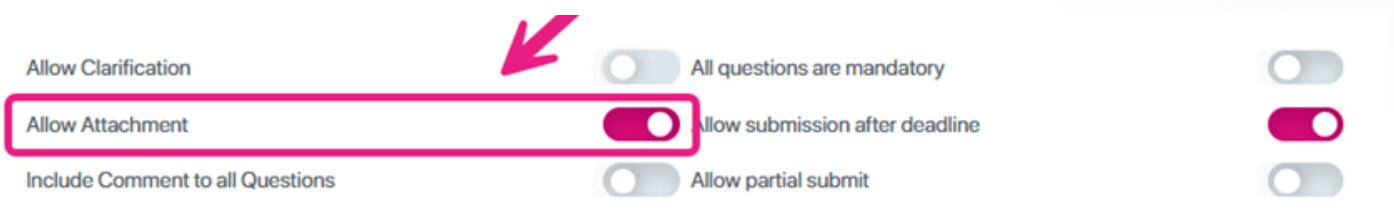


Alternatively, you can also create a comment box for each individual question within the question settings gear icon.



## 5 Allow additional files to be attached

We generally advise our clients to allow additional files/attachments to be provided in a response. This is particularly useful when the respondents want to provide complimentary information on a specific text, number or drop-down questions for example. You can do this at a questionnaire level only.



A screenshot of a questionnaire settings interface. The 'Allow Attachment' option is highlighted with a red box, and a red arrow points to it from above. The settings are as follows:

Setting	Toggle	Setting	Toggle
Allow Clarification	Off	All questions are mandatory	Off
<b>Allow Attachment</b>	<b>On</b>	Allow submission after deadline	<b>On</b>
Include Comment to all Questions	Off	Allow partial submit	Off

## 6 Allow responses to be provided after the deadline

We generally advise our clients to allow responses to be provided after the deadline (unless clients absolutely do not want to receive any response once the deadline has passed). This can be done at a questionnaire level only.

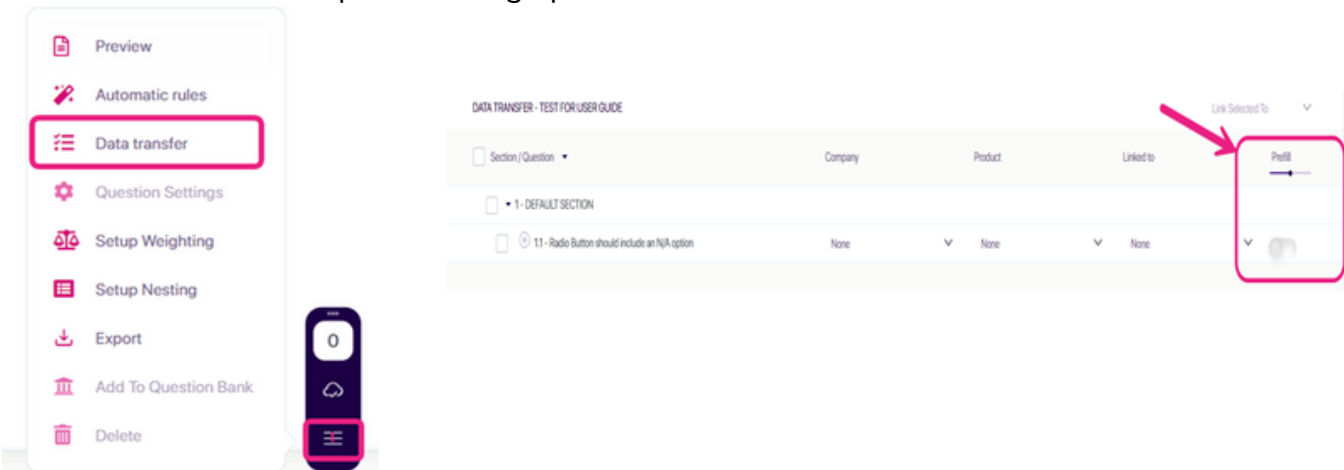
Allow Clarification	<input checked="" type="checkbox"/>	All questions are mandatory	<input type="checkbox"/>
Allow Attachment	<input checked="" type="checkbox"/>	Allow submission after deadline	<input checked="" type="checkbox"/>
Include Comment to all Questions	<input type="checkbox"/>	Allow partial submit	<input type="checkbox"/>



## 7 Pre-fill responses where possible

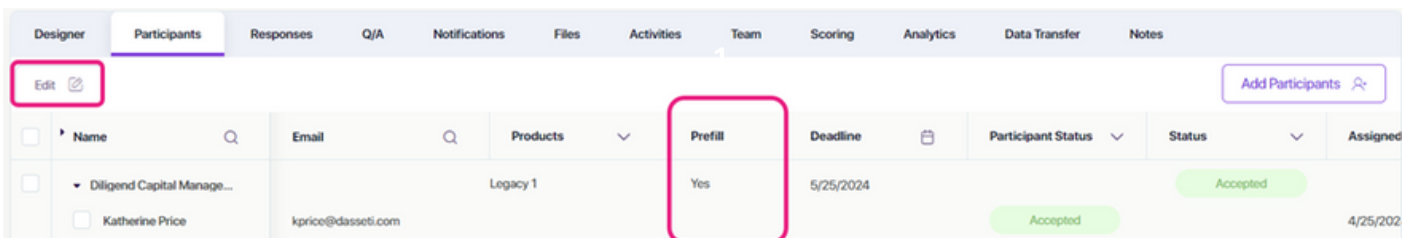
We generally advise our clients to activate this functionality which automatically pre-fills the answers on a new questionnaire (using information stored under the Company and/or Product profiles). At the questionnaire level you can turn on the functionality for all questions or specific questions. This can be managed within the questionnaire settings (Data Transfer). This functionality, together with the Smart Search which allows respondents to re-use previous responses, greatly improves the experience and turnaround time on questionnaires.

See below detailed steps on setting up Data Transfer and Prefill.



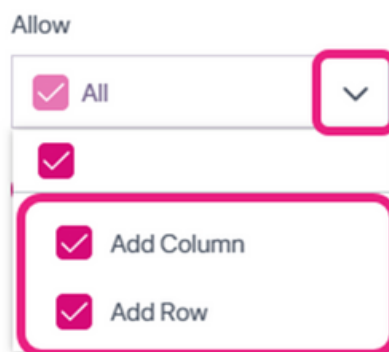
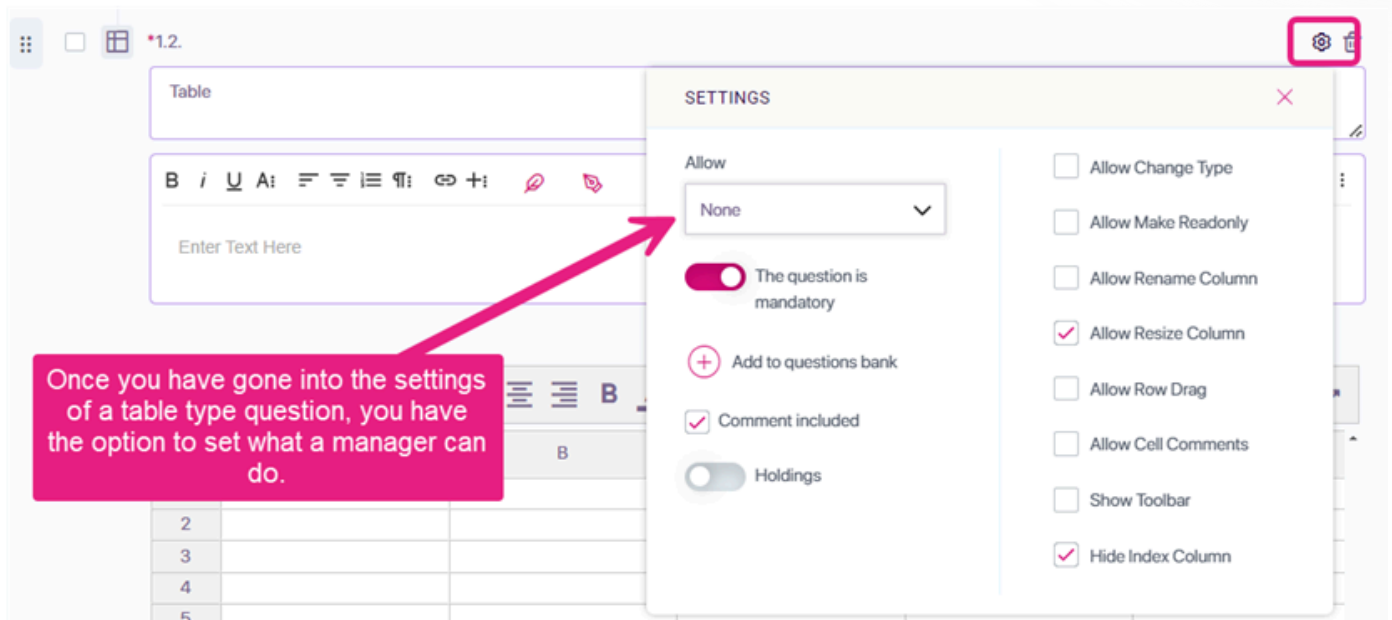
Once you have turned on the Prefill settings at the questionnaire level you will also need to enable Prefill for each individual respondent. From within the participants tab, select Edit, then turn on Prefill for the respondent.

Please note, prefill needs to be set within the questionnaire and for the individual respondent.



## 8 Allow respondents to edit tables

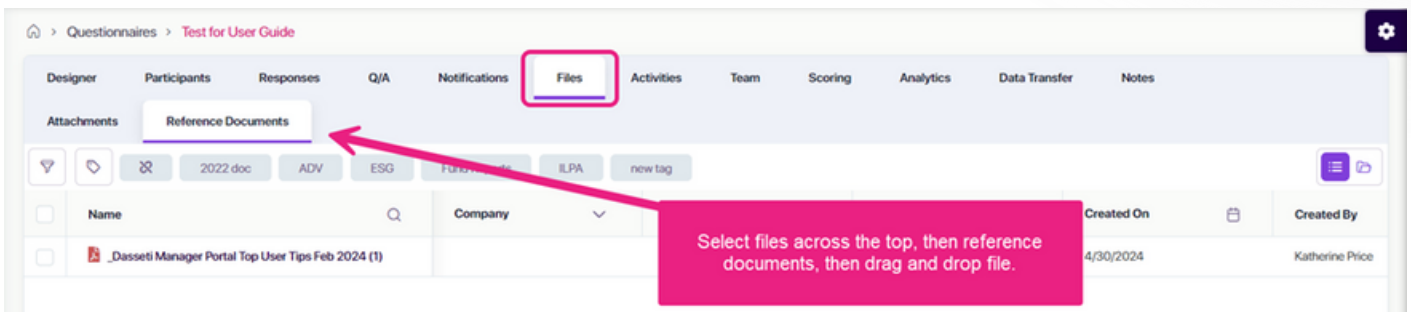
We generally advise clients that are using Table Type questions to define changes that respondents can make to the table structure. It includes adding columns/rows, renaming columns, resizing tables etc.



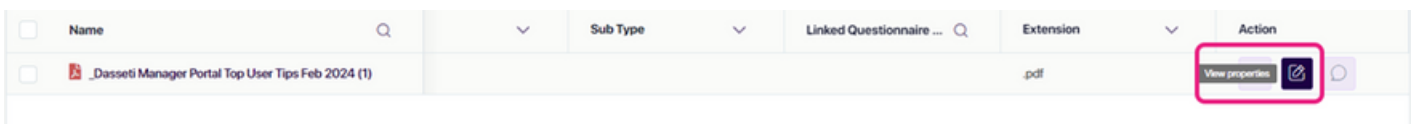
In cases where respondents may need the flexibility to add more content than the current table structure, it is recommended to allow the respondents to add column and/or row so that they can complete the table from the question and not have to submit additional documentation outside of the question.

## 9 Include the Submission Portal Top Tips Guide to all questionnaires

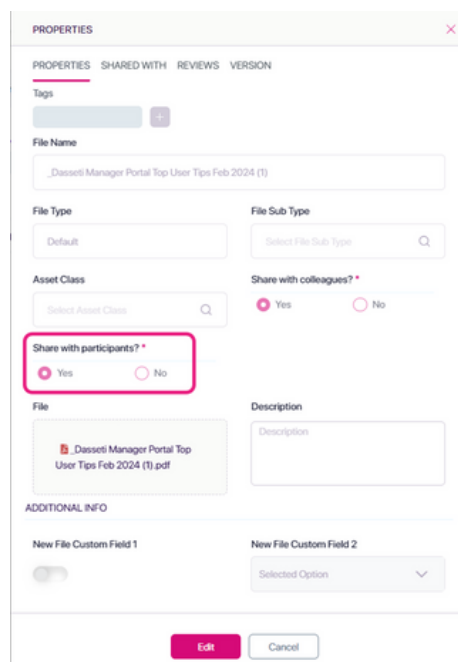
We recommend adding the Submission Portal Top Tips Guide as a reference attachment to all questionnaires. This will improve the respondent's user experience and reduce the number of queries, which will ultimately lead to better adoption and faster responses.



Please note that when loading the file you need to update file properties to share with participants. From the action column you will find the file properties.



Be sure to select 'Yes' when sharing with participants.



PROPERTIES

PROPERTIES SHARED WITH REVIEWS VERSION

Tags

File Name  
\_Dasseti Manager Portal Top User Tips Feb 2024 (1)

File Type  
Default

File Sub Type  
Select File Sub Type

Asset Class  
Select Asset Class

Share with colleagues? \*  
 Yes  No

Share with participants? \*  
 Yes  No

File  
\_Dasseti Manager Portal Top User Tips Feb 2024 (1).pdf

Description

ADDITIONAL INFO

New File Custom Field 1

New File Custom Field 2  
Selected Option

Edit Cancel

## 10 Turn on Clarification requests

We recommend turning on Clarifications to allow more direct communication per question between the client and the respondent. This will help centralise all interactions on a given questionnaire in one place.

Please note, from within the questionnaire settings, you must turn on the toggle to allow clarifications.

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Allow Clarification	<input checked="" type="checkbox"/>	All questions are mandatory	<input type="checkbox"/>
Allow Attachment	<input type="checkbox"/>	Allow submission after deadline	<input type="checkbox"/>
Include Comment to all Questions	<input type="checkbox"/>	Allow partial submit	<input type="checkbox"/>

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Contact us for more top tips or advice on creating questionnaires