

Send survey invitations with **Word** and **Outlook**

Send a personalized survey link to every stakeholder from your Outlook account, using Word's mail merge and the recipient list from the Surveys module.

TOOLS

Word · Outlook

SENDS FROM

Your Outlook account

YOU NEED

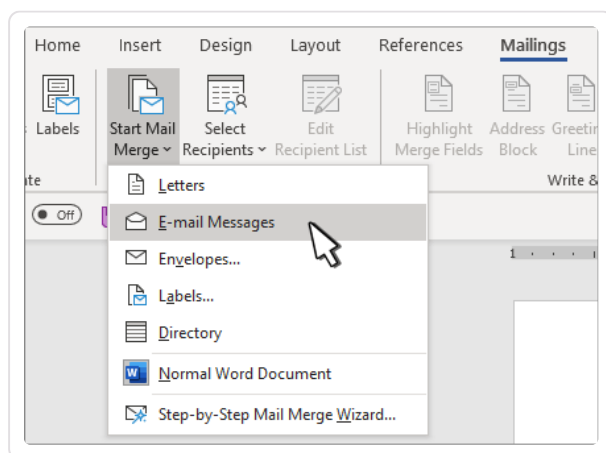
Recipient list export

STEP 1

Set up the merge in Word

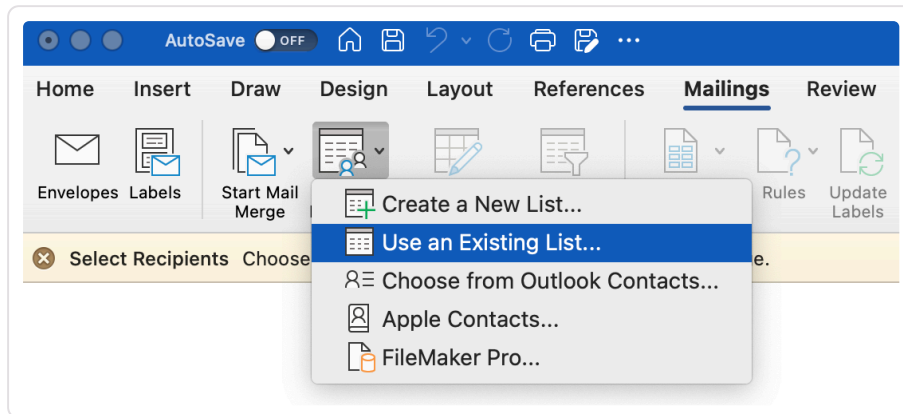
01 Download the list of recipients with survey links from the **Surveys** module.

02 Open Word and go to **Mailings > Start Mail Merge > E-mail Messages**.



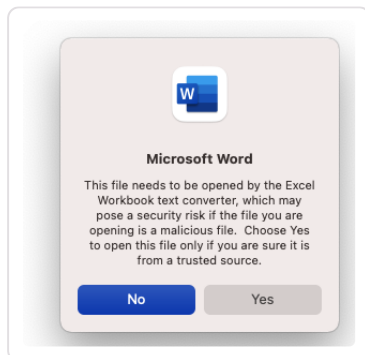


- 03 Select the recipients: click **Select Recipients** > **Use an Existing List**.

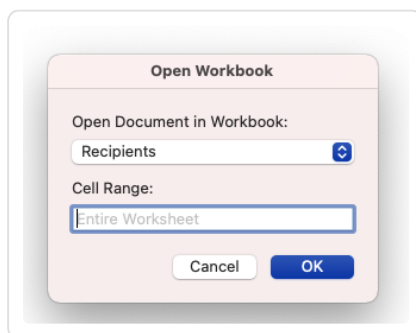


- 04 Browse your files and select the list of recipients you downloaded from the **Surveys** module.

- 05 Word will ask you to confirm the file is safe. Click **Yes**.



- 06 Keep the whole range selected and click **OK**.

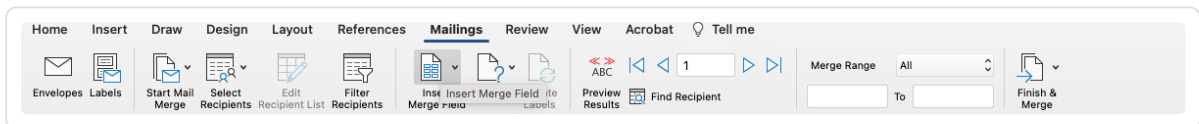




STEP 2

Write the email

- 07 Create the content of your email. You can use the template below, but you'll need to insert each merge field from the **Insert Merge Field** menu rather than typing it.



IMPORTANT

Each highlighted field below is a merge field. Typing the name won't work: insert it from the menu so Word replaces it with each recipient's data. Replace the text in square brackets yourself.

SUBJECT Invitation for a stakeholder survey from **[Your company]**

Dear «Title (optional)» «Name» «Surname (optional)» ,

[Your company] is currently in the process of identifying areas that could represent risks and opportunities for the company now and/or in the future, based on insights captured by Datamaran.

These insights are informed by an objective analysis of regulatory developments, industry best practices, peer activity, and public opinions on financial, environmental, social, and corporate governance issues. We recognize you as an important stakeholder and we would greatly appreciate the chance to gain your perspective via this short survey.

Thank you for taking the time to contribute to our assessment, the results of which will inform the identification of issues that have a relevant impact on us as a company as well as on our stakeholders.

Click on the link below to begin the survey:

«Survey_link»

For the optimal user experience, please use the latest version of Firefox, Chrome, Safari or Edge. You will not be able to access the survey using Internet Explorer. In case other browsers are unavailable, please consider responding via your mobile device.

Sincerely,

[Sender name]

[Your company]



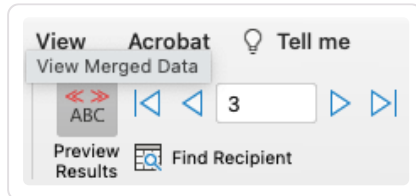
Click on the link below if you don't want to receive more notifications.

«Reject Survey Link»

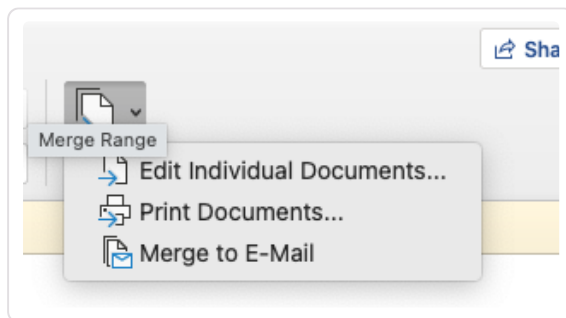
STEP 3

Preview and send

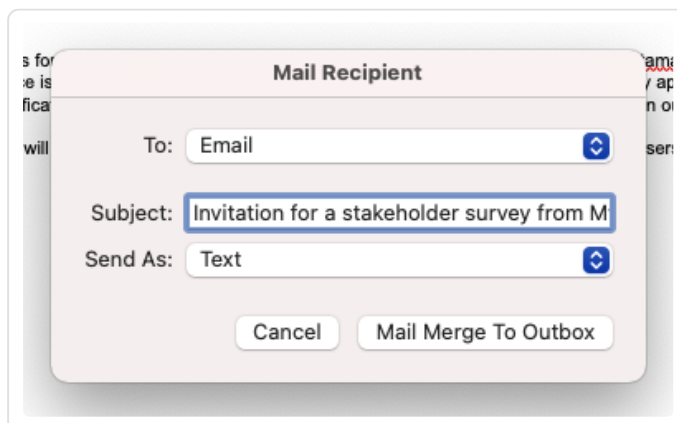
- 08 Check how the email looks for each recipient by clicking **Preview Results**.



- 09 Once your recipient list and email text are ready, go to **Finish & Merge > Merge to E-mail**.



- 10 In the pop-up, select **Email** in the **To** field and enter the subject of your email.



- 11 Click **Mail Merge To Outbox** to send the email with the survey links to all recipients.



BEFORE YOU SEND

Test the survey

- 01 Log in to your Outlook account and create a new email.
- 02 Use the template above and add the email addresses of your testers.
- 03 For the survey link, use the survey preview link from the platform.

TIP

No preview link? Take the first recipient's link in the sheet and replace `survey/` with `survey/preview/<Survey_ID>`, where `<Survey_ID>` is the unique ID of the survey.

REFERENCE

[Microsoft: Use mail merge to send bulk email messages](#)