Adding a stakeholder database to your Citizen Space consultation for free

Campaign Monitor is an awesome third-party tool for sending email to permission-based subscriber lists. We are going to make use of these lists to store interest- or area-specific lists of consultation stakeholders.

Part 1: Setting up your stakeholder database

1. Go to www.campaignmonitor.com and sign up for a new account.

2. Log into your new account and go to the settings for your organisation.
3. Go to the ‘Lists & Subscribers’ tab and hit ‘Create a new list’.

4. Create a list called ‘Stakeholder Database’. This is the list that all your subscribers will sign up to.

You can choose whether subscribers are sent an email to confirm their subscription, or whether they are signed up to the list immediately.

5. Repeat the process to make additional interest-specific lists. Your subscribers will have the opportunity to subscribe to any of these lists as well as the general stakeholder database.

Once you’ve made all your interest-specific lists, click on the Stakeholder Database list.

© Delib 2011 - www.delib.co.uk
6. Click the “Add a subscribe form to your site” link.

7. Choose the options that you want to show on your subscribe form. You'll probably want to select all the special interest lists that you created. You may or may not want to collect your subscriber's name.
8. An embed code will be generated for you. Copy this to the clipboard, ready for pasting into your consultation.
Part 2: Embedding your signup form in a Quick Consult consultation

1. Edit your Quick Consult consultation. On the main survey settings page, scroll down to find the “Completion Message” field.

2. Click the “Source” button to edit the raw HTML, and then paste in the Campaign Monitor embed code.

   Completion message
   This message will be displayed to the user along with their response ID when they submit their response.

   <p>Thank you for completing the consultation.</p>

   Completion message
   This message will be displayed to the user along with their response ID when they submit their response.

   <p>Thank you for completing the consultation.</p>

   <form action="http://citizenspace.createsend.com/t/r/s/qviyah/" method="post" id="SUBForm">
   <div>
     <label for="name">Name:</label><br />
     <input type="text" name="cm-name" id="name" />
   </div>
   <div>
     <label for="email">Email:</label><br />
     <input type="email" name="cm-qviyah-qviyah" id="qviyah-qviyah" />
   </div>
   <div>
     <input type="checkbox" name="cm-ol-qvili" id="ol-qvili" />
   </div>
   <input type="submit" value="Submit" />
   </form>
3. Click the “Source” button again to return to the normal view. You will see the subscribe form. You can make modifications to the form at this stage, such as adding explanatory copy.
Part 3: Testing the signup process

1. Preview the consultation by clicking the link at the top right of the page.

2. Make sure you are viewing the consultation in “open” mode, and then click the “Online consultation” link to see how the survey will look when it’s live.

3. Step through the consultation until you get to the penultimate screen (this will look different if you have chosen a non-linear survey) and click the “Submit your response” button.
4. Enter your name (if required), your email address, and choose the special interest groups you want to subscribe to. Then hit “Subscribe”

5. You will see an unbranded confirmation message from Campaign Monitor, and have the option to return to the consultation.
Part 4: Using your stakeholder database

1. Go back to the “Lists & Subscribers” tab in Campaign Monitor. You’ll see that your “Stakeholder Database” list has one subscriber, and so do the special interest groups that you chose to sign up to.

2. Click on any of your lists to see a graph of signups over time, and other top-line statistics.
3. Go to the “Create/Send” tab and click “Create your first campaign”. A campaign is a mailout which will go to all your subscribers, or to a subset of your special interest groups.

4. Follow the steps in the wizard to name your campaign, choose its style, enter your content, and choose which of your mailing lists it should go to. Only mailing lists with subscribers will be shown.

At the end, you will be shown a summary of your new campaign and have the opportunity to send a test email to yourself to check the layout.

5. Schedule your campaign delivery. It can either be sent immediately or on a specified date and time.
6. When your campaign has been delivered, check your email. You will see that unsubscribe information has been appended to your message.

7. You will now have access to Campaign Monitor’s reports containing the number of addresses the campaign was successfully delivered to, unsubscribe rates and so on.

If you chose to send an HTML-formatted message, you will also see reports on how many people opened the email, and which links they clicked.