



## Welcome and Thank You Text

### Welcome Text

Thank you for visiting [this site](#). You've been randomly chosen to take part in a brief survey to let us know what we're doing well and where we can improve.

Please take a few minutes to share your opinions, which are essential in helping us provide the best online experience possible.

### Welcome Text - Tablet/Phone

### Thank You Text

Thank you for taking our survey - and for helping us serve you better. We appreciate your input!

### Thank You Text - Tablet/Phone

### Example Desktop

The screenshot shows a desktop view of a survey form. At the top right is the FORESEE logo. The title is "Customer Satisfaction Survey". The main text reads: "Thank you for visiting our site. You've been randomly chosen to take part in a brief survey to let us know what we're doing well and where we can improve. Please take a few minutes to share your opinions, which are essential in helping us provide the best online experience possible." Below this is a TRUSTe Certified Privacy logo and the text "Required questions are denoted by an \*". A question is partially visible: "Please rate the extent to which the products on this website appeal to you". Below the question is a row of radio buttons with labels "disagree" and "agree". At the bottom, there are "Cancel" and "Submit" buttons, copyright information for 2016, and links for "ForeSee", "ForeSee Privacy Policy", and "Contact Us".

### Example Mobile

The screenshot shows a mobile view of the survey form. It features the FORESEE logo at the top right. The text is: "Thank you for visiting our site. You've been selected to participate in a brief survey to let us know how we can improve your experience. Please take a minute to share your opinions." Below this is a TRUSTe Certified Privacy logo and the text "Required questions are denoted by an \*". A question is partially visible: "Please rate the extent to which the products on this website appeal to you". At the bottom, there are "Cancel" and "Submit" buttons, and links for "ForeSee", "ForeSee Privacy Policy", and "Contact Us".

Model Name Advisor Info Browse  
 Model ID s45i51RBhFNZk9k9wY5whw4C  
 Partitioned Yes - 2MQ  
 Date 4/27/2016

~~Red & Strike-Through~~: Delete  
Underlined & Italicized: Re-order  
 Pink: Addition  
 Blue: Reword



Label	Element Questions	Label	Satisfaction Questions	Label	Future Behaviors
	<b>Look and Feel (1=Poor, 10=Excellent, Don't Know)</b>		<b>Satisfaction</b>		<b>Recommend Site (1=Very Unlikely, 10=Very Likely)</b>
1 Look and Feel - Appeal	Please rate the <b>visual appeal</b> of this site.	16 Satisfaction - Overall	What is your <b>overall satisfaction</b> with this site? <i>(1=Very Dissatisfied, 10=Very Satisfied)</i>	19 Recommend Site	How likely are you to <b>recommend this site</b> to someone else?
2 Look and Feel - Balance	Please rate the <b>balance of graphics and text</b> on this site.	17 Satisfaction - Expectations	How well does this site <b>meet your expectations</b> ? <i>(1= Falls Short, 10=Exceeds)</i>		<b>Return (1=Very Unlikely, 10=Very Likely)</b>
3 Look and Feel - Readability	Please rate the <b>readability of the pages</b> on this site.	18 Satisfaction - Ideal	How does this site <b>compare to your idea of an ideal website</b> ? <i>(1=Not Very Close, 10=Very Close)</i>	20 Return	How likely are you to <b>return to this site</b> in the future?
	<b>Site Performance (1=Poor, 10=Excellent, Don't Know)</b>			21 Seek More Information	<b>Seek More Information (1=Very Unlikely, 10=Very Likely)</b>
4 Site Performance - Loading	Please rate how <b>quickly pages load</b> on this site.				How likely are you to <b>seek out more information</b> about investment professionals and potential investments as a result of visiting this site?
5 Site Performance - Consistency	Please rate the <b>consistency of speed from page to page</b> on this site.				
6 Site Performance - Completeness	Please rate how <b>completely the page content loads</b> on this site.				
	<b>Navigation (1=Poor, 10=Excellent, Don't Know)</b>				
7 Navigation - Organized	Please rate <b>how well this site is organized</b> .				
8 Navigation - Options	Please rate the <b>options available for navigating</b> this site.				
9 Navigation - Layout	Please rate <b>how well the site layout helps you find what you need</b> .				
	<b>Information Browsing (1=Poor, 10=Excellent, Don't Know)</b>				
10 Information Browsing - Sort	Please rate the ability to <b>sort information by criteria that are important to you</b> on this site.				
11 Information Browsing - Narrow	Please rate the ability to <b>narrow choices to find the information you are looking for</b> on this site.				
12 Information Browsing - Features	Please rate how well the <b>features on the site help you find the information you need</b> .				
	<b>Site Information (1=Poor, 10=Excellent, Don't Know)</b>				
13 Site Information - Thoroughness	Please rate the <b>thoroughness of information</b> provided on this site.				
14 Site Information - Understandable	Please rate how <b>understandable</b> this site's <b>information</b> is.				
15 Site Information - Answers	Please rate how well the site's <b>information provides answers to your questions</b> .				

QID	QUESTION META TAG	Skip From	Question Text	Answer Choices	Skip To	Required Y/N	Type	Special Instructions	CQ Label
HDU6707Q001	Visit Frequency		How frequently do you visit this site?	This is my first visit Daily Weekly Monthly Every few months Once every six months or less often		Y	Radio button, one-up vertical		Visit Frequency
HDU6707Q002			Which category best describes you?	Individual Investor Financial Advisor or Investment/Securities Professional Student Teacher/Academic Attorney <span style="color:blue;">Consultant</span> <span style="color:blue;">Securities Regulator</span> <span style="color:red;">Media/Press</span> <span style="color:red;">General Public</span> Other		Y	Radio button, one-up vertical	Skip Logic Group*	Role
HDU6707Q003		A	Please briefly describe your role:			N	Text field, <100 char	Skip Logic Group*	Other role
HDU6707Q004			What is your primary interest in visiting this site today?	<span style="color:blue;">Review the accuracy of the site</span> <span style="color:blue;">Check out the background of a firm</span> <span style="color:red;">Obtain basic or general information about investing</span> <span style="color:red;">Learn about investment scams or avoiding fraud</span> <span style="color:red;">Learn about fees for investment products and services</span> Check out the background of an investment professional <span style="color:blue;">Review aggregate data</span> <span style="color:red;">Use one of the investment Calculators</span> Other		Y	Radio button, one-up vertical	Skip Logic Group*	Primary Reason
HDU6707Q005		A	Please briefly describe your primary interest in visiting this site today:			N	Text field, <100 char	Skip Logic Group*	Other reason
HDU6707Q006			Have you ever checked with a state or federal regulator regarding the background, registration, or license of a financial professional?	Yes No	-A	Y	Radio button, one-up vertical	Skip Logic Group*	Learning Behavior
HDU6707Q007		A	Will your findings impact your decision to work with a particular investment professional?			N	Text field, <100 char	Skip Logic Group*	Broker Learning
HDU6707Q008			Did you learn something on this site that might impact your behavior in the future?	No Yes Maybe		Y	Radio button, one-up vertical	Skip Logic Group*	Learning
HDU6707Q009		A	Please specify what you learned:			N	Text area, no char limit	Skip Logic Group*	Learned
HDU6707Q010			How did you learn about this site?	Search engine (Google, Bing, etc.) Referred by SEC.gov <span style="color:blue;">Referred by Investor.gov</span> <span style="color:blue;">Referred by FINRA BrokerCheck</span> <span style="color:red;">Referred by another website, other than SEC.gov</span> Radio Television <span style="color:red;">IRS tax refund insert</span> In-person event/conference Social media (Twitter, Facebook, etc.) News source (magazine/newspaper/radio/television) Referred by a friend or family member Prior visit Other		Y	Radio button, one-up vertical	Skip Logic Group*	How Found
HDU6707Q011		A	Please specify how you learned about this site:			N	Text area, no char limit	Skip Logic Group*	OE-Found
HDU6707Q012		B	Which Investor.gov page did you visit most recently?	Homepage Compound Interest Calculator page <span style="color:blue;">Other Investor.gov page (including alerts and bulletins)</span>		Y	Radio button, one-up vertical	Skip Logic Group*	Investor.gov Page
HDU6707Q012		C	Please describe the event/conference you attended:			N	Text area, no char limit	Skip Logic Group*	OE-Event Attended
HDU6707Q013	Accomplish		Did the site help you do what you wanted to do today?	Yes No Partially I wasn't looking for anything in particular		Y	Radio button, one-up vertical	Skip Logic Group*	Able to Accomplish
HDU6707Q014	OE_Accomplish	A	Please specify what you were trying to do:			N	Text area, no char limit	Skip Logic Group*	Inable to Accomplish
HDU6707Q015			How did you look for the information you wanted/needed on this site? (Please select all that apply.)	<span style="color:blue;">Used the navigation tabs/headings near the top of the home page</span> <span style="color:blue;">Used the topic buttons on the main central part of the home page</span> <span style="color:blue;">Used the site search feature</span> <span style="color:blue;">Used the site map</span> <span style="color:red;">Already knew where to go on the site or had specific page bookmarked</span>		Y	Checkbox, one-up vertical	Skip Logic Group*	Method of Looking

			Not sure			Mutually Exclusive			
			Other-	A					
HDU6707Q016		A	What other method did you use to look for the information you wanted/needed?		N-	Text area, no char limit	Skip-Logic Group <sup>2</sup>	Other-Method	
HDU6707Q017			How would you describe your navigation experience on this site today? (Please select all that apply.)	I had no difficulty navigating/browsing on this site		Y	Checkbox, one-up-vertical; Mutually Exclusive	Skip-Logic Group <sup>2</sup>	Navigation
				Links often did not take me where I expected	A				
				Had difficulty finding relevant information					
				Links/labels are difficult to understand					
				Too many links/navigational options to choose from					
				Had technical difficulties (error messages, broken links, etc.)	B				
Could not navigate back to previous information									
			I had a navigation difficulty not listed above:	C					
HDU6707Q018		A	Please describe any specific navigation links or paths that did not take you where you expected:		N	Text area, no char limit	Skip-Logic Group <sup>2</sup>	OE_Nav-Path	
HDU6707Q019		B	Please describe which links were broken or had error messages:		N	Text area, no char limit	Skip-Logic Group <sup>2</sup>	OE_Nav-Link	
HDU6707Q020		C	Please briefly describe your navigation difficulty:		N-	Text area, no char limit	Skip-Logic Group <sup>2</sup>	OE_Navigate	
HDU6707Q021			Did you use any search features on this site today?	Yes	A	Y	Radio-button, one-up-vertical	Skip-Logic Group <sup>2</sup>	Search-Usage
				No					
HDU6707Q022		A	Please tell us about your experience with the site's search features today. (Please select all that apply.)	Search results were helpful		Y	Checkbox, one-up-vertical; Mutually Exclusive	Skip-Logic Group <sup>2</sup>	Search-Experience
				Results were not relevant/not what I wanted					
				Too many results/I needed to refine my search					
				Not enough results					
				Returned NO results	B				
				Received error message(s)	C				
Search speed was too slow									
			I experienced a different search issue (please explain):	G					
HDU6707Q023		B	What search term(s) did you use?		N	Text area, no char limit	Skip-Logic Group <sup>2</sup>	OE_Search-Terms	
HDU6707Q024		C	Please describe the issues or errors you experienced with the search feature:		N	Text area, no char limit	Skip-Logic Group <sup>2</sup>	OE_Search-Issue	
HDU6707Q025	OE_Improve Experience		If you could make one change/improvement to this website, what would it be?		N	Text area, no char limit		Improvement	