

# HOW TO CREATE SURVEYS THAT WORK!

PRESENTED BY

**SWAY UX**

WORKSHOP

# AGENDA

1. INTRODUCTION
2. SURVEY BEST PRACTICES
3. REAL WORLD EXAMPLES
4. YOUR QUESTIONS

You will leave here today with the practical know-how to create a winning survey that informs your products, processes, web presence



# 1. INTRODUCTION



# MEET YOUR DISCUSSION LEADERS

Sway UX is led  
by Dan Zola &  
Kerry Thompson.

- A nimble, dedicated team
- Leaders in digital design, usability, strategy, and engagement
- 40 years of combined experience



**Dan Zola**

Managing Partner, Research Director

**Background includes:**

- MTV
- Bandwidth
- Quintiles



**Kerry Thompson**

Managing Partner, Creative Director

**Background includes:**

- GlaxoSmithKline
- Emily's List
- Fidelity Investments



# 2. SURVEY BEST PRACTICES

# WHAT IS A USER SURVEY?

A user survey is a questionnaire designed to collect thoughts, experiences, and opinions from a wide group that can help inform decisions about your products, programs, & web presence

- Illuminate improvement opportunities
- Don't have to be there, in-person
- Evaluate user satisfaction
- Better understand your audience (language, pain points, priorities)



# WHEN TO CONDUCT A USER SURVEY

- **Any time you need user input**
- At the start of a new project
- When you need to identify or prioritize service offerings
- When you need to determine satisfaction
- When making decisions about messaging or user priorities

# WHO TO SURVEY: EXISTING USERS

People who are  
current or past  
users of your  
products, programs,  
web presence

- How people use your products, processes, web presence
- What features are most important
- User satisfaction
- What the value is people see in your product, service, or agency
- Language people use when talking about your product or service



# WHO TO SURVEY: GENERAL AUDIENCE

Non-users offer a fresh perspective from people who aren't already familiar with your product or service

- The purest data you can get
- How people describe your value
- Reactions to messaging
- Market gaps & opportunities

# WHO TO SURVEY: TARGETED AUDIENCE

Targeted users are ideal for program-specific interactions

- How people describe your value
- Landscape of your product
- Reactions to messaging
- Market gaps & opportunities
- Longitudinal comparisons



# WHAT MAKES A GOOD SURVEY?

# WHAT MAKES A ~~GOOD~~ BAD SURVEY?



# WHAT MAKES A ~~GOOD~~ BAD SURVEY?

A bad survey results in **survey fatigue** for the user, causing your data set to be unreliable.

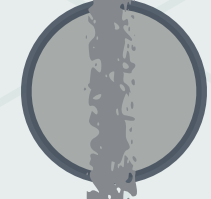
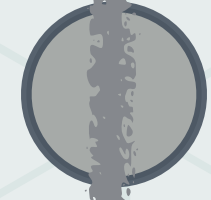
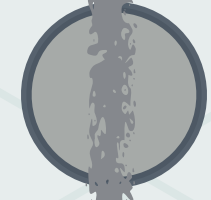
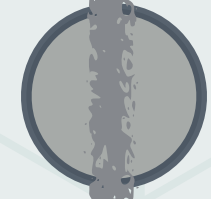
- Too many questions
- Convoluted questions
- Answer choices that don't line up with how users think
- Questions that require long or complex answers

# WHAT MAKES A ~~GOOD~~ BAD SURVEY?

A bad survey can also result in unclear, **inactionable data** for you, the survey administrator.

- Answers that could have more than one meaning
- Answers that are vague - such as lots of 5s and 6s from a scale of 1-10
- Answers that don't provide new information
- "Straight line" answers

# WHAT MAKES A ~~GOOD~~ BAD SURVEY?



*Strongly  
Agree*

*Agree*

*Neutral*

*Disagree*

*Strongly  
Disagree*



# WHAT MAKES A GOOD SURVEY?

◆ BEST PRACTICES ◆

# WHAT MAKES A GOOD SURVEY?

Ask about one thing at a time.



# WHAT MAKES A GOOD SURVEY?

Use simple, familiar words  
rather than technical jargon.



# WHAT MAKES A GOOD SURVEY?

**Stay away from 1-10 rating scale.**  
*Consider reframing as a question with a binary answer, or ranking specific features/factors instead.*



◆ BEST PRACTICES ◆

# WHAT MAKES A GOOD SURVEY?

1 ○ ○ ○ ○ ○ ○ ○ ○ ○ ○ 10





◆ BEST PRACTICES ◆

# WHAT MAKES A GOOD SURVEY?

Yes

No





◆ BEST PRACTICES ◆

# WHAT MAKES A GOOD SURVEY?

**Taste**

**Nutrition**

**Calories**

**Ease**

**Price**

**Gluten-free**





# WHAT MAKES A GOOD SURVEY?

**Avoid words with ambiguous meanings.**  
*You want all users to interpret the question  
the same way.*



◆ BEST PRACTICES ◆

# WHAT MAKES A GOOD SURVEY?

“Own Data”

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◆ BEST PRACTICES ◆

# WHAT MAKES A GOOD SURVEY?

“Own Data”

“CRO”

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◆ BEST PRACTICES ◆

# WHAT MAKES A GOOD SURVEY?

Be clear & brief.



◆ BEST PRACTICES ◆

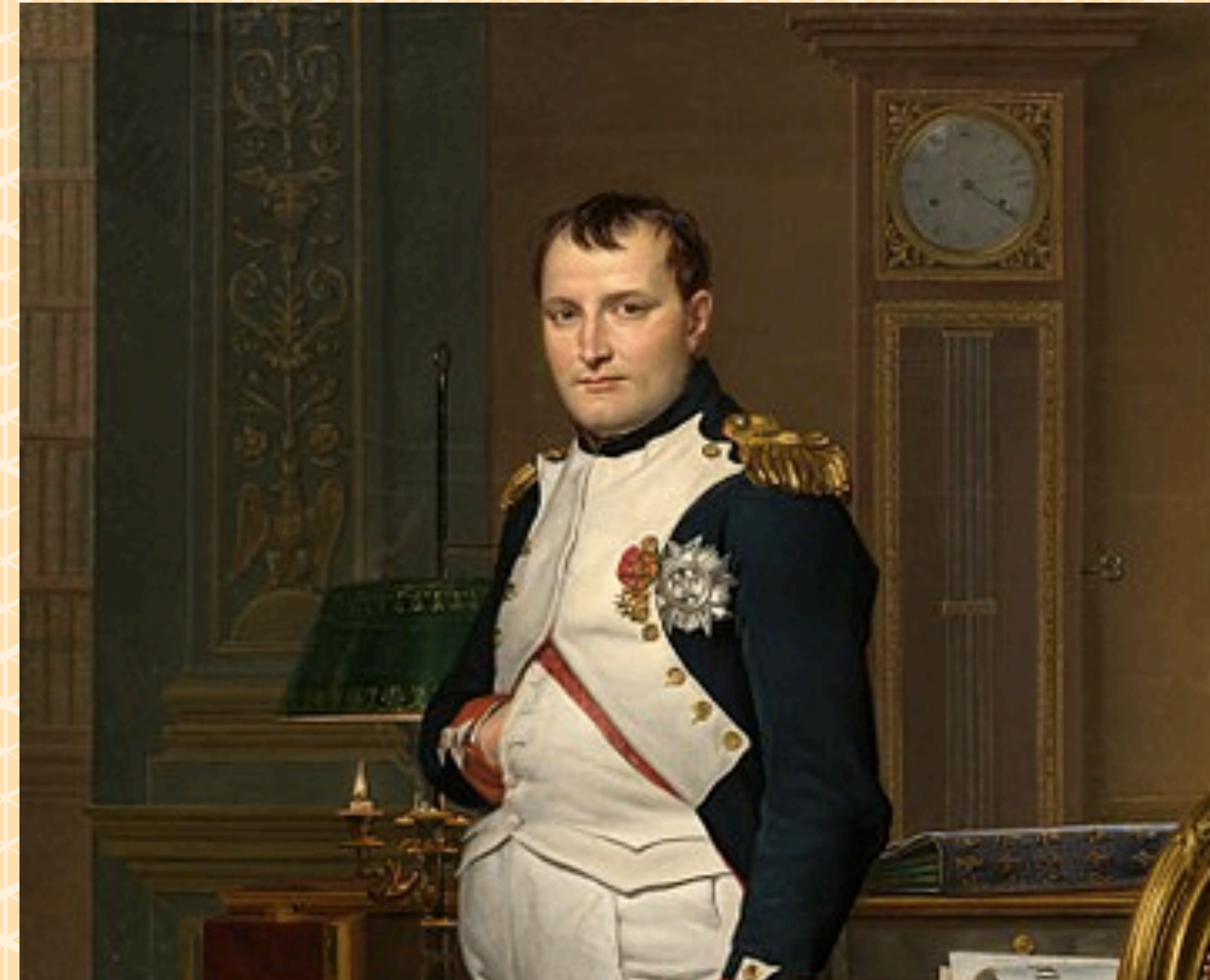
# WHAT MAKES A GOOD SURVEY?

Don't ask leading questions.



# WHAT MAKES A GOOD SURVEY?

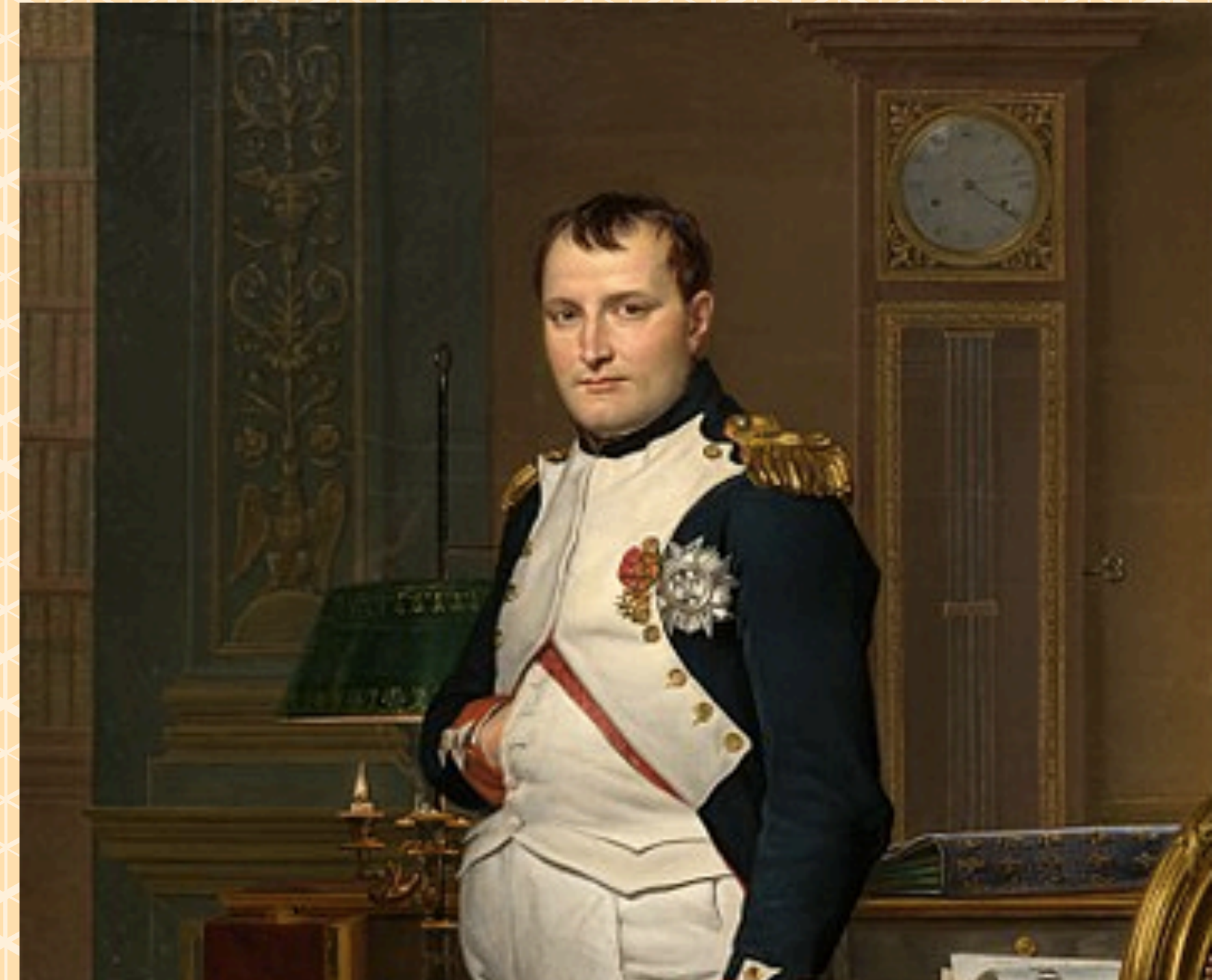
*“How short was  
Napoleon?”*





# WHAT MAKES A GOOD SURVEY?

*“How would you  
describe Napoleon’s  
height?”*





# WHAT MAKES A GOOD SURVEY?

## Actual Survey Question

*“Do you agree with the plans for a  
REDACTED PROGRAM to be undertaken  
by REDACTED 3rd-PARTY?”*

☐ Yes

☐ No



# WHAT MAKES A GOOD SURVEY?

***“Do you agree** with the plans for a  
REDACTED PROGRAM to be undertaken  
by REDACTED 3rd-PARTY?”*

☐ Yes

☐ No



# WHAT MAKES A GOOD SURVEY?

“Do you agree *with the plans* for a  
*REDACTED PROGRAM* to be undertaken  
by *REDACTED 3rd-PARTY*?”

☐ Yes

☐ No



# WHAT MAKES A GOOD SURVEY?

*“Do you agree with the plans for a  
REDACTED PROGRAM to be undertaken  
by REDACTED 3rd-PARTY?”*

☐ Yes

☐ No

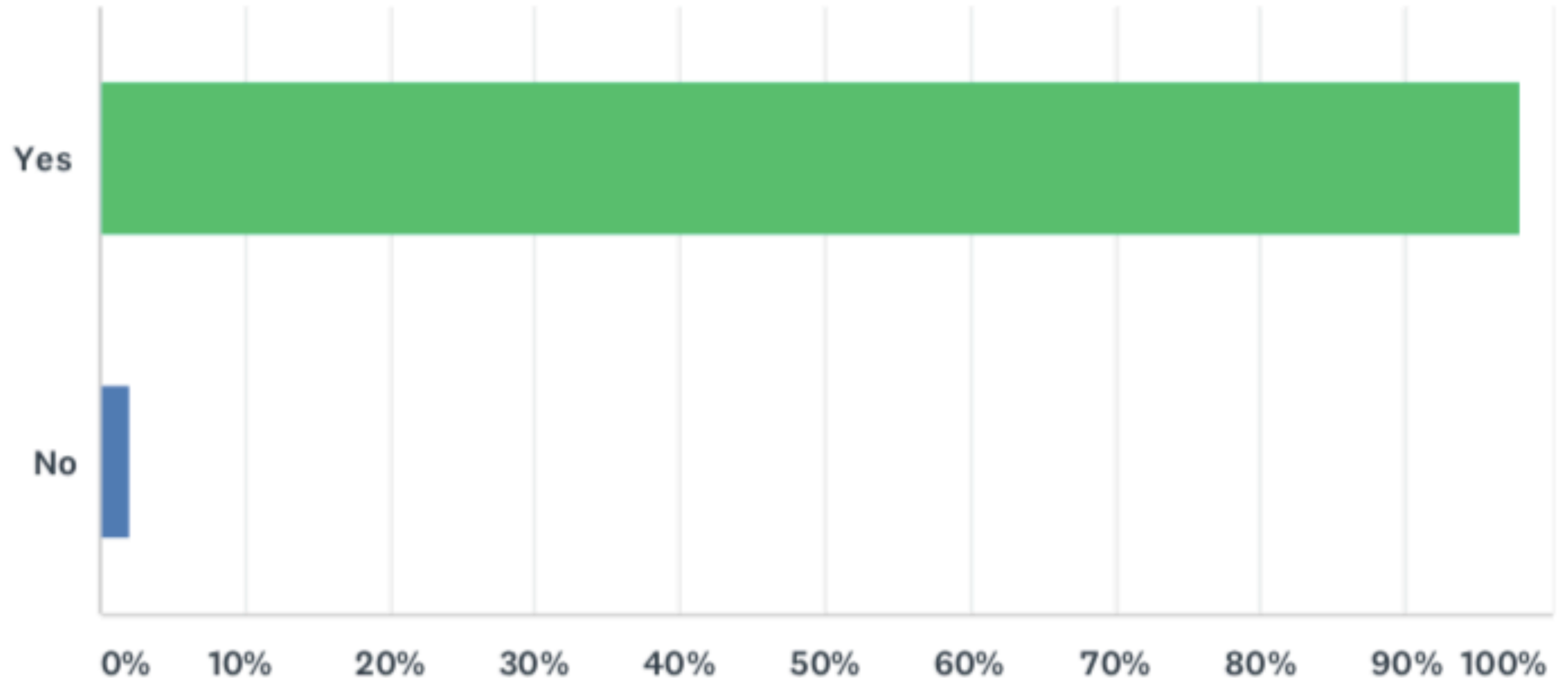


# WHAT MAKES A GOOD SURVEY?

*“This other group should do the work  
that they said they would do,  
don’t you think?”*



# WHAT MAKES A GOOD SURVEY?



# WHAT MAKES A GOOD SURVEY?

- Stay away from 1-10 rating scale - consider reframing as a question with a binary answer, or ranking specific features/factors instead.
- Don't ask leading questions.
- Ask about one thing at a time.
- Use simple, familiar words rather than technical jargon.
- Avoid words with ambiguous meanings - you want all users to interpret the question the same way.
- Be clear & brief.



# CONSTRUCTING YOUR SURVEY

Prepare a list of objectives. What will you do with this information?

- **Gauge interest** in a new feature or service
- **Prioritize** a feature list
- **Learn** how users describe your organization's value
- **Monitor** overall satisfaction with your product or service



# CONSTRUCTING YOUR SURVEY

Have your  
audience self-  
identify

- Create one survey for multiple audiences
- Segment your data
- Analyze the results of each group
- Compare & contrast

◆ BEST PRACTICES ◆

# CONSTRUCTING YOUR SURVEY

Ask open ended questions -  
**and ask them first.**



# CONSTRUCTING YOUR SURVEY

Using a survey platform makes it easy to reach a wide audience and track data.

- Use a survey platform such as Survey Monkey or Survey Gizmo
- Survey tools will organize your responses for you, and allow your data to be presented visually in charts and graphs
- Major platforms also offer the option to recruit an audience

◆ BEST PRACTICES ◆

# CONSTRUCTING YOUR SURVEY

Keep it short!

*(More than 10 questions may not get you  
the response rate you want)*



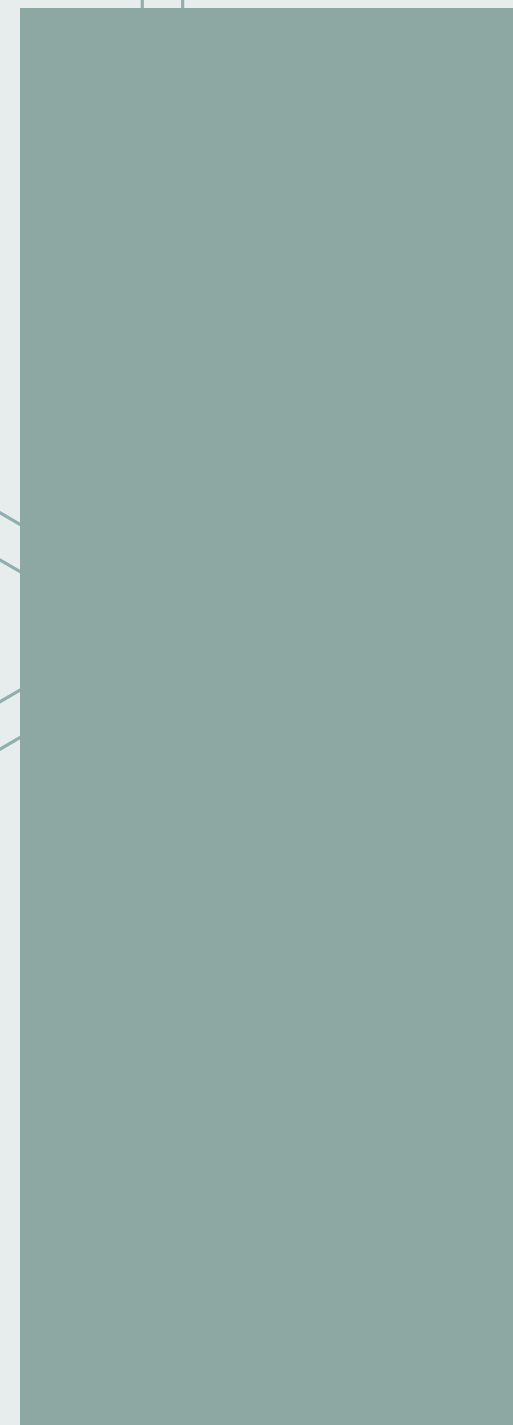
# CONDUCTING YOUR SURVEY

Collect the largest data set you can. The more responses you get, the more reliable your data set.

- Expect a 10-15% response rate
- Send multiple emails and reminders to your survey audience
- Allow 1-2 weeks to collect survey responses

🟠 BEST PRACTICES 🟠

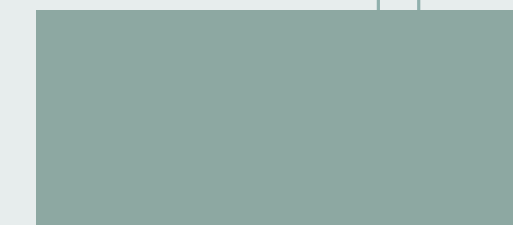
# CONDUCTING YOUR SURVEY



Tuesday



Thursday



Following Tuesday



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# CONDUCTING YOUR SURVEY

Your subject line could make or break your survey. Craft it carefully.

- Include words such as “Invitation:” or “Reminder:”
- Consider including the estimated time it will take to complete.
- Include the survey topic.

🟠 BEST PRACTICES 🟠

# CONDUCTING YOUR SURVEY

Invitation: Tell us how you feel  
in 2 minutes

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# CONDUCTING YOUR SURVEY

Invitation: Happier students & parents  
in 4 minutes

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# CONDUCTING YOUR SURVEY

Reminder: Maximize student potential,  
a 3 minute survey

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🟠 BEST PRACTICES 🟠

# CONDUCTING YOUR SURVEY

Reminder: 8 questions for parents of  
special needs children

# DOS & DON'TS

## Do:

- ✓ Ask open ended questions first
- ✓ Ask actionable questions
- ✓ Send multiple invites
- ✓ Put effort into a compelling subject line

## Don't:

- ✗ Use numerical rating scales
- ✗ Make your survey too long
- ✗ Ask leading questions
- ✗ Ask vague, or convoluted questions



# 3. REAL WORLD EXAMPLES








# RESULTS: USER LANGUAGE












# RESULTS: PURCHASE DECISIONS

## Small Company Responses

Item	Overall Rank	Rank Distribution	Score
Reliability	1		91
Ease of use	2		91
How well the software integrates with my current systems	3		62
Price	4		58
Ease of set-up	5		57
Breadth of functionality	6		46
 <div>Lowest Rank</div> <div>Highest Rank</div>			

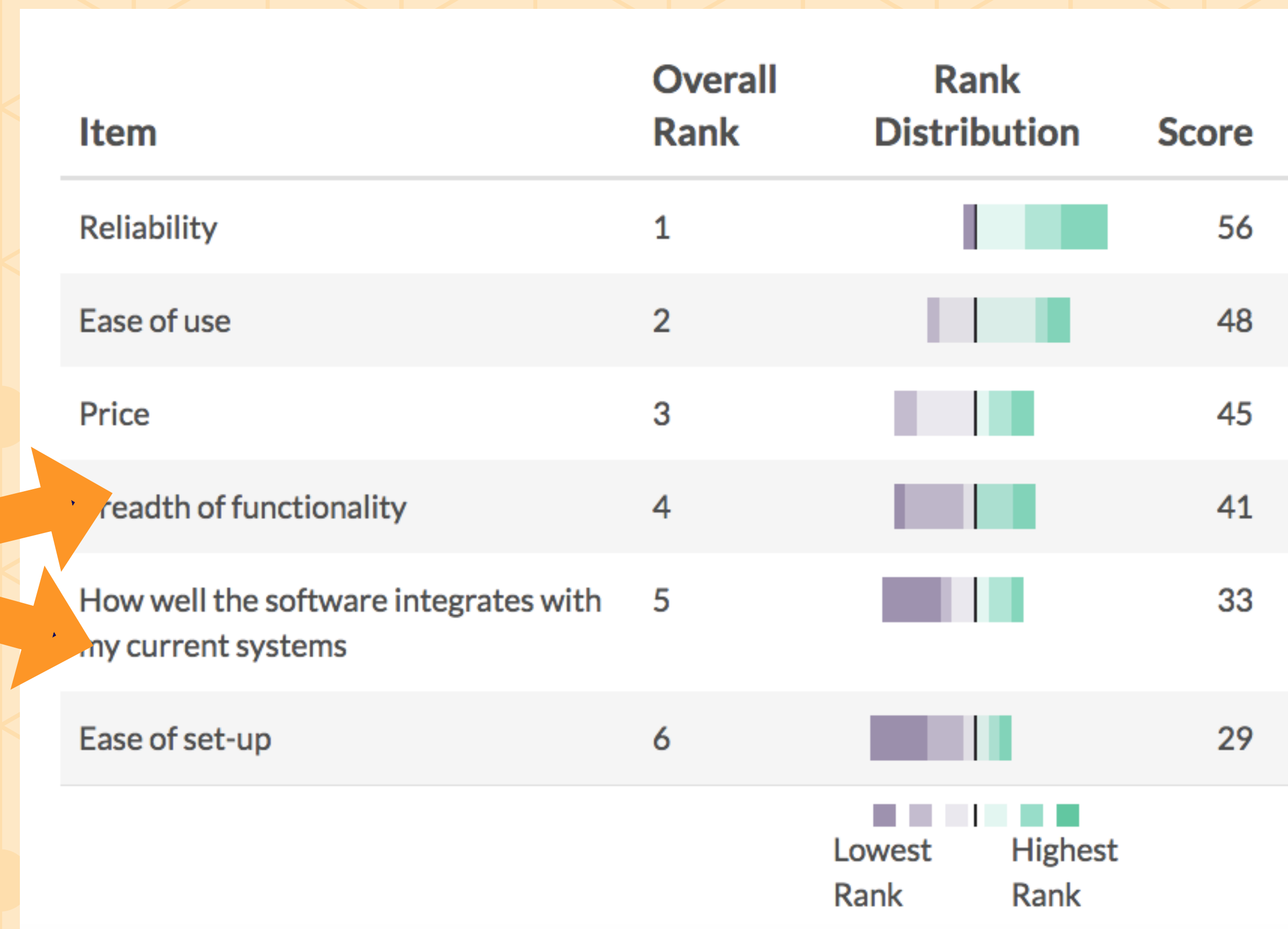
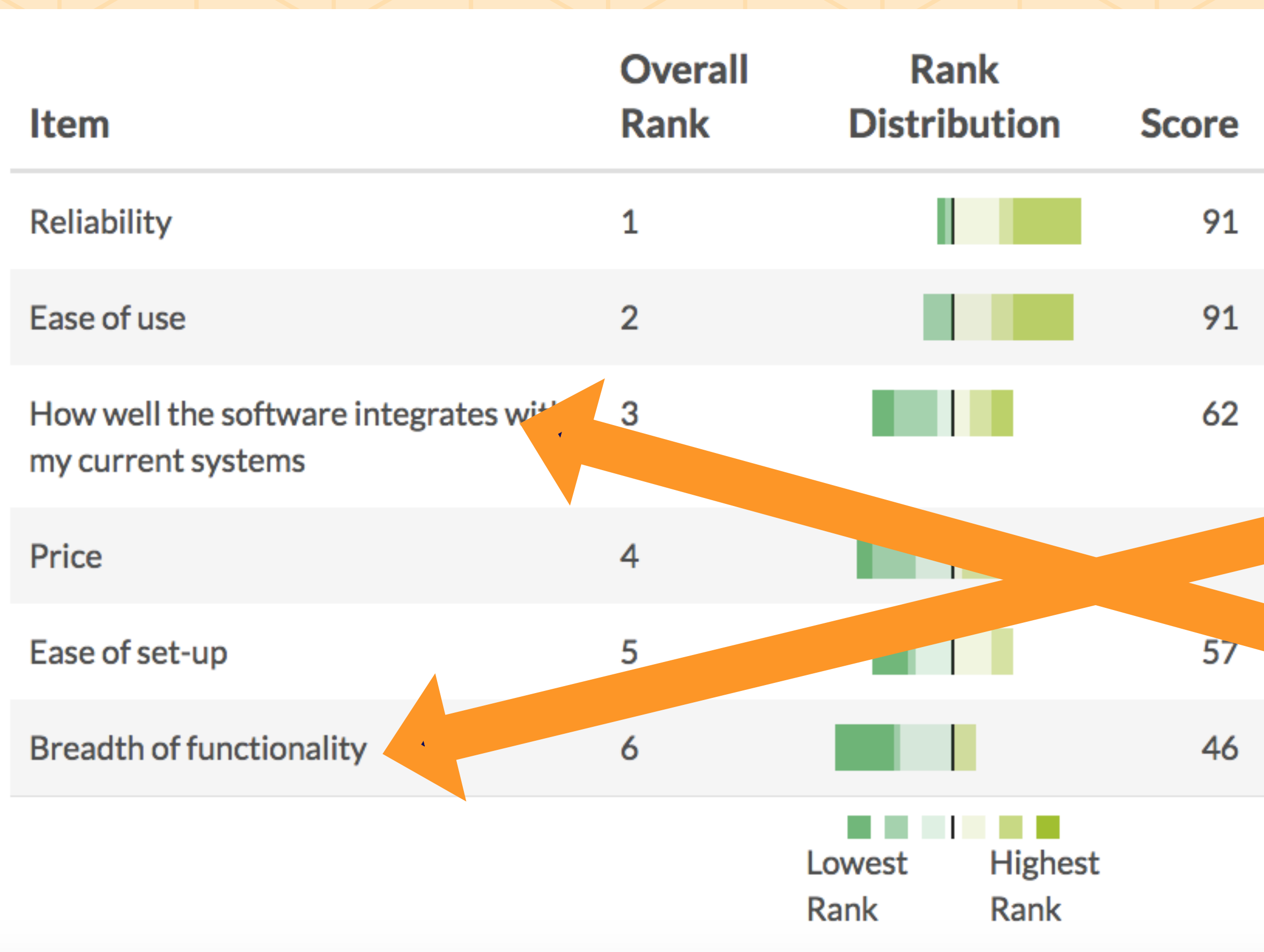
## Large Company Responses

Item	Overall Rank	Rank Distribution	Score
Reliability	1		56
Ease of use	2		48
Price	3		45
Breadth of functionality	4		41
How well the software integrates with my current systems	5		33
Ease of set-up	6		29
 <div>Lowest Rank</div> <div>Highest Rank</div>			

# RESULTS: PURCHASE DECISIONS

## Small Company Responses

## Large Company Responses





# RESULTS: DESIRED PROGRAMS

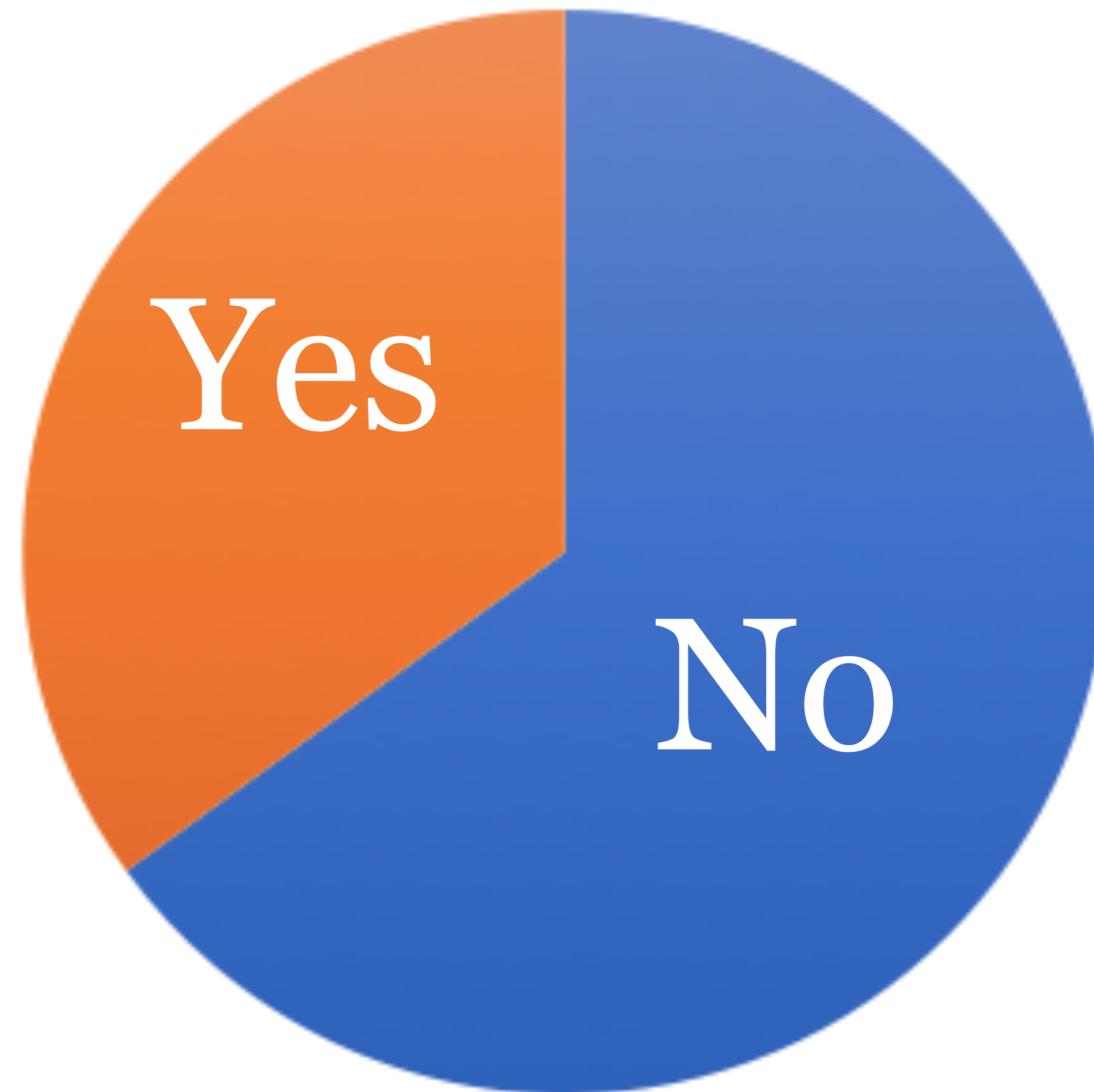
## Decision Making Factors

	Most Important						Least important	
Features	1	2	3	4	5	6	7	SCORE
Finding & completing required courses	67%	12%	6%	4%	3%	6%	3%	7.08
Tracking credit hours	13%	18%	19%	19%	14%	10%	8%	5.36
Seeing my certification-based courses	7%	18%	22%	19%	17%	10%	7%	5.2
Viewing & printing transcripts	5%	18%	22%	20%	17%	10%	7%	5.17
Finding & completing elective courses	4%	27%	14%	12%	18%	10%	14%	4.99
Scoring 'reward points' for LMS activity	2%	4%	7%	15%	17%	26%	29%	3.62
Communicating with other learners	2%	3%	10%	10%	14%	28%	32%	3.57

◆ EXAMPLES ◆

# RESULTS: EXIT SURVEY

Were you able to find what you were looking for?





◆ EXAMPLES ◆

# RESULTS: EXIT SURVEY

Yes, I was looking for:



◆ EXAMPLES ◆

# RESULTS: EXIT SURVEY

No, I was looking for:





# QUESTIONS?

*We'd love to hear from you.*

*Call us at **917-968-2218***

*Or email Dan at **[dan@swayUX.com](mailto:dan@swayUX.com)***

**THANK YOU**

**SWAY UX**