HOW TO CREATE SURVEYS THAT WORK!

PRESENTED BY

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

BEST PRACTICES

SWAY UX
WHAT MAKES A GOOD SURVEY?
WHAT MAKES A GOOD SURVEY?

Ask about one thing at a time.
Use simple, familiar words rather than technical jargon.
Stay away from 1-10 rating scale. Consider reframing as a question with a binary answer, or ranking specific features/factors instead.
WHAT MAKES A GOOD SURVEY?

1  0  0  0  0  0  0  0  0  0  10
WHAT MAKES A GOOD SURVEY?
WHAT MAKES A GOOD SURVEY?

Best Practices

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.
WHAT MAKES A GOOD SURVEY?

“Own Data”
WHAT MAKES A GOOD SURVEY?

“Own Data”

“CRO”
WHAT MAKES A GOOD SURVEY?

Be clear & brief.
Don’t ask leading questions.
“How short was Napoleon?”
WHAT MAKES A GOOD SURVEY?

“How would you describe Napoleon’s height?”

SWAY UX
"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
“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.

Best practices:

• 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

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

BEST PRACTICES

Have your audience self-identify

SWAY UX
CONSTRUCTING YOUR SURVEY

Ask open ended questions - and ask them first.
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
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
CONDUCTING YOUR SURVEY

Tuesday                    Thursday           Following Tuesday
11am                        2pm

BEST PRACTICES
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.
CONDUCTING YOUR SURVEY

Invitation: Tell us how you feel in 2 minutes
CONDUCTING YOUR SURVEY

Invitation: Happier students & parents in 4 minutes
Reminder: Maximize student potential, a 3 minute 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

EXAMPLES

Decision Making Factors

Yes

No
### RESULTS: PURCHASE DECISIONS

#### EXAMPLES

**Small Company Responses**

<table>
<thead>
<tr>
<th>Item</th>
<th>Overall Rank</th>
<th>Rank Distribution</th>
<th>Score</th>
</tr>
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<tbody>
<tr>
<td>Reliability</td>
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<tr>
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<td></td>
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<tr>
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<td>5</td>
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<tr>
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### RESULTS: PURCHASE DECISIONS

#### Examples

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## RESULTS: DESIRED PROGRAMS

### Decision Making Factors

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

Were you able to find what you were looking for?

- Yes
- No
RESULTS: EXIT SURVEY

Yes, I was looking for:

- Contact
- Data
- Job
- Health
- Solutions
- Privacy
- Career
- Trends
- Reports
- Research
- New
- Info
- Sales
- Oncology
- Stuff
- Know
- Search
- Sales
- Paper
- Info
- Test
- Careers
- Jobs
- Research
- Drug
- Site
- Names
- All
- Statements
- More
- Positions
- Reference
- General
- Digital
- Internal
- Know
- Stuff
- Internal
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
THANK YOU