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of crappy surveys out there, so I know that this is a strong research method. And it's really important that we do it well and I'm excited to hear what gene has to say so that we can do it well.

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I need to record, so let me just go ahead and do that.

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Because I was forgetting.

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All right everybody say yay to that and we'll go ahead and get started. Thank you very much.

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So we're on all of your favorite social media channels, and we would love for you to follow us on the ones that are listed here we're going to throw a link in the chat.

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And this is where you can connect to all of us. All of our social media channels.

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And again, we'll be posting the recording on our website, and it will also be on YouTube. We also have original content and educational content on all these channels as well.

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So please feel free to follow us on these.

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Our next event is on February, 8, and this is a networking event. We're going to throw the link into the chat here, so that you can join the event bright and join us for this networking event, we will have networking after tonight's talk but this, The

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event on February 8 is just an exclusive, a networking event, so we'll throw a link in the chat there so that you can get your ticket to that.

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And then our event for February's a really exciting one this is the first year reflection of UX researchers so we have a panel, led by a friend of UX research and strategy, Lena, wha, and she's going to be talking to people who are going to walk us through

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and explain like what their first year was like what they wish they knew before they came in and what and what insights they could share with you, who might be transitioning into UX or coming out of a boot camp for school.

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So this is going to be on February 16, and will also throw a link in the chat to get your ticket to this event to, we have like, including tonight's event we have five events open right now.

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So, loads of things happening we have world is a day, we have networking we have all kinds of events, we have a webinar about how to create your UX portfolio.

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Coming up, and so if you go on event bright, sign up for all the things we will be sending out a survey after.

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After speaking of surveys, we're going to be sending around now after this event tonight.

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We your feedbacks really valuable to us and it helps inform what we should do with our events in our group and so it's a very short question, a short survey and your feedback.

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Again, super valuable. So if you could take a minute.

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We're going to also throw the link to the to that in the chat.

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And so that you have it ready here, but we'll also send it up in a follow up email, so please provide your feedback so that we can make improvements based upon what you, what you suggest.

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Now, without further ado, I'm going to pass the mic to gene and she is going to guide us through this, I'm really excited about this topic.

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Designing better UX surveys. So, Jean, take it away. Right. Can you hear me. Yes, right. So let me, hopefully I can share my screen.

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And just to be sure, I'm on the right track, you're doing networking at the end so What time should I.

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Yes, thank you, Jean I forgot to mention that we will be having some breakout sessions. After tonight's talk so gene is going to give a talk, we're going to field some questions about, you know, that you put in the chat.

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And then we'll have networking sessions, like, I don't know if this is your first time but we have two breakout rooms and then we come back for what we call happy hour, which is whoever's left after all the breakout rooms we just come and ask the community

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general questions. So generally for the first hour so gene, we're not where we are very flexible and time, go over that is great.

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We'll make it work for sure. So generally about the first hour and then what for those who are not super comfortable about networking will give you time to fall off, but we'd really love for you to join us.

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So please welcome gene, give a little applause emoji.

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All right, thank you so much and I assume you can see the screen now you can yes we can. Okay, great.

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I am really excited to be here today to.

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I I'm don't hear too much about you is designing surveys, although there's some really great work happening, which we'll talk about tonight, but they are a really big important aspect of the work that we do so I'm excited to be sharing this and I'm eager

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to hear your questions and talk with us, the more at the end.

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So, all right let me figure out how sometimes. There we go.

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So, just to give you some background about myself.

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I came from an undergraduate degree in human factors so I've been doing this work for a long time.

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I worked for a couple of years at American Institute for Research which is a consulting company and the Boston area or now all over.

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I went to graduate school and then after graduate school I ended up at the Bureau of Labor Statistics BLS we do things like we produce the consumer price index which has been in the news a lot lately.

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That's the rate of inflation that typically we hear about. We've also heard about the unemployment rate.

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The unemployment rate is part of the jobs report so these are really important metrics of how our economy is doing related to look to labor.

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So it's a really great mission and I'm really happy there for a lot of our data we use surveys to collect our data.

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So I've been doing a lot of work with surveys, and it turns out is funny when I started there.

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I found out that a lot of my colleagues were survey methodology lists and they had PhDs and survey methodology. And so I would tell them like like I who knew you could get a PhD in survey methodology and I said who know you could get a PhD and user experience.

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So along the way we are, we've been learning a lot from each other. So what I'm going to what I'm going to be talking about today is a lot what I've learned from them and the research, and my experience with designing a lot of surveys that.

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Before I get into surveys, I do want to give a little bit of plug for you excellent in government.

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There's a lot of great work be being done in the government, there's some more, they would call it Human Factors work being done in the military and the transportation.

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There's a lot of great UX work all the government agencies have websites systems and services and at all levels of government there's some neat stuff happening at the state and local level as well.

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Some agencies have innovation labs that are using human centered design approach for innovation, which I think it's just really, really cool.

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And the work is rewarding fun, interesting and I've got great colleagues so just I know that's not really what we're here to talk about but I just wanted to give it a plug this is us work I see we have people from all over the world, there's there's great

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UX work happening in governments in governments all over.

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Um, it's, it's somebody's got their not unmute could you mute please.

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Thanks very much.

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Okay, so I think we probably all know what these are, but just to be sure we're all on the same page.

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A survey is basically a protocol where you are looking for information from groups of people in a systematic way. The goal is to generalize the information you get from those small groups to get estimates of the larger population.

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We could sort of talk about the Venn diagrams of questionnaires versus surveys versus even polls, but just for the sake of today that are let's consider kind of them, they're all kind of the same it's basically we're going to be asking questions and that's,

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that's what we're going to be focusing on today is those questions, interviews, and focus groups to some extent, would would benefit from what we're going to be talking about.

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But they're a little bit different but some of the some of the concepts and thought process that goes into developing the questions would apply to interviews and focus groups as well.

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The questionnaires and surveys are generally given online or paper, and it's important when you are sort of looking at them and evaluating them that you do look at it in that final mode that you're going to be giving it to him.

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Because sometimes things go differently, like as you're transitioning from paper to online.

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In UX we use surveys and a lot of different ways.

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I use them all the time and usability tests, I have usually have one or two post test questions, and a couple of post test questions as well. We use them an ethnographic work where we're going to ask people about what they're doing and it could be part

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of an interview but it could also be a survey that we give them either before. So we have a better idea of what their situation is or or afterwards.

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We use them in stakeholder feedback a lot we do a lot of surveys of our data users to get input from them. And there could be more market research type surveys that are more looking at like how are people using your product or how are people using other

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products and get input about that.

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So, we're using surveys a lot in UX. So what I want to talk about today is why it's important to think about survey design, we're going to learn some things from survey methodology that apply to surveys in UX and share some best practices for designing

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and testing surveys as well. We'll cover selecting the topics, writing survey questions and some of the different kinds of questions that we might use in a UX survey, and then a little bit about testing the survey questions.

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There are plenty of topics about surveys we won't be covering today, at least in much detail.

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The first issue is sampling, and that is making sure that you are inviting all of the right people to complete your survey and making sure or at least evaluating who's responding.

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We talked about non response a lot in at pls and we look at, is there a non response bias that is are we getting skewed data because not everybody in certain groups are responding.

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So that's something to pay attention to.

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We also will be talking about motivation like what makes people want to complete surveys and what can you do in presenting your survey, presenting the invitation to help encourage people to fill it out, and I will give you a hint though there is no silver

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silver bullet that will that will get people to everybody to fill out your survey although we are trying we're trying to find that.

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and then do incentives help, they are not a silver bullet, but there are cases where incentives may help them they may be monetary or they may be, for us it may be things like providing them access or helping showing them where the data are that they

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might find helpful.

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I'm not going to be talking about data cleaning which is, how do you decide if a response is valid, and whether a whole response responses are valid like whether they're just giving you the first response and everything and whether they're really paying

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attention, and also what do you do without wires.

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And this is especially an issue if any of you are using like mt park or something like that.

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The data cleaning is a big issue because there's a can be a good percentage of the responses that you may be questionable.

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I would encourage you to see Carolyn Jarrett's presentation on planning services she covers a lot of the sampling and other planning issues.

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And she does a great job. And to sort of follow on with that she's.

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I, she did not pay me to say this but she has just published a book on surveys that work to follow up to her book forms that work so I've got some great input and this is not.

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It is not marketing or just saying that this, this is out there.

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And just sore on Jim Lewis, Jim Lewis at measuring you calm has some great blog posts on surveys studies related to survey design.

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So, we heard a little bit about why we might talk about them but there's some reasons why we probably don't talk about them very much. They're not new.

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They've been around for a long time they're not really cool, but they are everywhere, and it's, it turns out it's pretty easy to do them poorly. And so it's important, if we're going to be making decisions based on the data we get that the, that we that

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we do design them well.

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So for the next couple of slides, I'm going to look at some examples of surveys that have problems and if you are ever.

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You know, want to go down a rabbit hole on the web, there's a lot of places to do that but I recommend that survey question, Twitter feed.

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That has where a lot of these came from, more people post.

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What are often very poor certain questions so I'm, I've got a couple here.

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Some from my own experience as well but I do want to go over them and if I were in person. I would we would sort of talk about what you see and what's working with not but since we're not in person I just encourage you to sort of read through it and decide.

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Think about what you might think is a problem with the survey, only the question.

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I'll point out some of them for this question. The scale is inconsistent. The question is, how was your experience today. And I've grayed out more specific details about where the survey came from, neither good nor poor very poor very satisfied satisfied

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or poor, so the scale goes from poor satisfied to poor, and we.

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And those are not consistent within the scale options appear to be randomly ordered not along the continuum. And not all options answer the question directly and this is something that will come up a couple of times that when you have the survey, think

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about it as a conversation between you and your responded so that you ask a question, and the response options that you provide should be direct answers to that question.

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So, if you think about it, if someone said How was your experience today. You might say poor or you might say very poor, you probably wouldn't say satisfied.

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So those would not be good responses to that this particular question.

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And just to give you another example of where the responses are not good answer to the question. This one is during your most recent visit how satisfied you were with the following covered 19 measures in store.

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And the response scale is strongly disagree to strongly agree. Again, those responses don't answer the question, um, you could probably, you can probably figure out what they're getting at and what you might answer but it's it's kind of an awkward conversation.

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Here's another example. This is a more graphic scale.

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The text says I don't care about sports, I don't understand how some people are still obsessed.

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And there's a couple of problems with this one.

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First we'll talk about this is a double barreled question, and we'll talk about them a little bit more, but for me personally, I care a little bit about sports, but I don't understand how people can be so obsessed.

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So how would I answer this question.

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So there's not an easy way also I think that the color and the icons in the scale will probably bias people to select the green checkbox as opposed to not selecting the red X.

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And also, and I didn't even see this at first but there is a neither agree or disagree option that is in the lower right hand corner that is not part of the scale and not very salient at all.

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I looked, there's a more recent version of the same scale that has similar issues that the mid point is a little bit easier to see but still not as talented as the as the two extremes.

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Here's another example, this is a slider. And there's a number of issues with sliders.

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The first one I'll mention is on as it says on a scale of one to 10 How much do you miss going to the theater.

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And at first, this looks scary, but if you think about it.

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It's hard to tell a non response from a five, because some of us sliders.

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If you pick a default value and the default value is there whether the responded selects it or not, um, there are some other designs were sort of spider starts off of the scale and then the person has to move it onto the scale or the person has to actually

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click on it to select it.

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Those are better designs, but with some sliders this can be an issue, and the other issue is this, is that if you think about the actual midpoint of a one to 10 scale it's not five.

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So, this is going to skew your results because people are going to could select the five thinking that it's the midpoint because it sure looks like the mid point here.

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Here's another example. The question says, which of the following best describes how you feel about the aircraft you just flew, And the responses are I would actively avoid flying this aircraft again.

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I don't want to fly the aircraft again, I would like to fly the aircraft again. And I would go out of my way to fly the aircraft again.

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So if you think about this, I think about how you might answer this.

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For me, my response, actually, oops, was not on the scale, which is that I don't really care so much about which aircraft I'm in as long as it's clean and safe and I have enough room.

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So, that option is missing.

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There's also thinking about supposes were required question. What would I do, I would either end the survey, or I would give you bad data because none of these are the right answer for me.

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So, this isn't required but it's something to think about is which questions are required, because it can.

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If you don't have all the options or if somebody gets frustrated, it's, it's easy to for them to just drop out of your survey, and you don't want to, don't want to do that if, if you can encourage them to keep going.

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Okay, I have one more example.

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This is what is the age of the young youngest child.

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Zero to Three months, four to six months, one to two years, three to four years and then a couple of other years up to 15.

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This isn't. This is an example of an issue that happens a lot when we've got groupings like this. It happens with for us we do some information, some surveys with more we're looking for income, it can happen with that as well.

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and the issue is that there are some

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ages in this that are don't have a property category. For example, if your child is eight months old.

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Where do you what do you select.

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There's also the issue of if their child is two and a half years old. I suspect to the authors of this were thinking you would probably pick two, but sort of technically two and like once you're past your second birthday you are older than two.

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So we usually try to use language of like zero up to three three up to six months and things like that so it's very clear, where one ends, where one group ends and where the next one begins.

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So, we've seen some designs that are maybe difficult for responded to and may not get you the data you want.

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So, because you may be making important decisions based on your survey results you want to be sure that your results are valid and give you really good data so that you're making good decisions.

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And we have seen that designing good surveys is not common sense or they would have not, they would they would have all been designed beautifully.

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So we're going to look at some of the.

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Take some input from that academic research and survey methodology and talk a little bit more about designing, building and designing your survey.

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So I want to start with the content for the survey so sort of overall, the topic that you're going to be covering. Um, so you're starting from scratch.

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And what is it that you want to ask about in your survey.

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Well, Let's start with what you really need to know.

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I have fallen into this trap too, and it happens pretty frequently, where you have a lot of things you want to look at a lot of things you want to input on and you start adding things like oh, this would be really interesting.

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Oh, and this would be really interesting to Let's ask this question.

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And then all of a sudden you have a lot of questions you have a long survey, you have questions, a lot of questions that would be interesting.

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You don't need to have the information but as long as they're getting this doing the survey, you might as well ask this other question.

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And just, I encourage you to be careful with that because it's really easy for surveys to get really long.

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What happens also is you get responses to those questions and you don't know how to use them. You don't have a plan for what you're going to do with that information, or how you're going to use that information to make decisions.

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So before you go in have clear research questions, established ahead of time so you know what it is you need to have answered.

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And don't ask things that just might be interesting.

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It's really tempting I know, but try not to ask them because you don't want people to take the time to complete surveys when you're not going to use their data.

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Also think about, are you asking for information that you can get from somewhere else, like, Are you looking for in general the kinds of pages that people are going to on your website.

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Well, that's something you can get from analytics, it may be some works You got it, but it's better for you to do the work than ask your respondents to do the work.

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The next issue is, are you asking questions that your target audience can answer.

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You may be asking questions that they don't know the answer, or they may not remember the answer or they may not have access to the information they need to answer the question.

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So just be sure you understand who the target audience is, so that you can provide you can build your questions and know that they can provide good data.

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Also, as in with with any research, it's good to have a plan for how you're going to analyze the data before you start collecting a lot of data, because you want to be sure that you're collecting it in a way that's useful, that the values are collecting

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are useful and you can do the analysis that you need to. And this is especially important for open ended questions because they can be very very tedious to answer to analyze.

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So you want to be sure you are only asking open ended questions that you really plan to do the analysis for, because if you have, even if you have just three open ended questions.

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If you have 100 people filling out your survey that's 300 potential for up to 300 open ended responses that you have to figure out how to code.

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So just make sure you know how you're going to analyze your data before you start your survey.

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Okay, so we're going to go into, we have our topics we're going to go into writing questions. But one thing I do want to talk about before we get too into detail of the questions is a survey response model is a model that survey methodology, have been

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using for a while.

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And it breaks down the steps of interpreting and responding a question into four, four phases First there's comprehension, where the respondent is reading and understanding the question retrieval, where they're looking for the information that they need

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to respond, whether that's something that they have in their memory or something they have to look up. That is judgments. So based on this information they've gathered, they're deciding on their answer.

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And finally, the response, where they have their answer and then they have to map it to do have a scale is it an open ended question. So they have to just sort of tailor their answer to the format that you have for the responses.

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So for the next few minutes I want to talk about some best practices, there's a lot of issues that we could talk about here.

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But I want to focus on reading skills rankings double barreled questions and agree disagree questions. These are topics that come up a lot in UX work, and I sometimes review surveys for.

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not for BLS sort of program surveys but like our data user surveys or stakeholder surveys, and also for other people and these are the kinds of issues that come up a lot in those kinds of surveys.

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So we probably all know what a rating scale is but just to be sure. It's basically a continuum of one construct, where the response of options cover the full range of the continuum.

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You may have adult no or not applicable options, they would be included, generally at the end of the scale because they're not part of the continuum.

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It's also not a list of categories, it's something that is, is optional. And there is kind of an order to to the options.

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So, some general guidance for rating scales we saw this earlier that the response options to directly answer the question posed.

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And so think about it like if they if it were an open ended question with those responses on labels be appropriate for that question.

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And choose the qualifiers, and that, and the by qualifiers I mean the terms like not at all very somewhat moderately to create an evenly distributed scale.

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Now there's been some research into the kind of assigning values to these qualifiers and I've done some work with recently on this as well.

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There's not really a clear like this is the five point scale this is the seven point scale.

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There's not a.

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There's not a clear solution to that so just do the best you can. The research kind of shows that the effectiveness of the choice of the qualifiers kind of depends on the question and the construct that you're evaluating and the context and.

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So, just do the best you can with this.

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And make sure to cover the full range of options.

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So we'll talk about two types of writing skills that sort of categorizing them.

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All of them will fall into one or the other. The first is a bipolar scale, where the ends of the scale are opposites.

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The example here is strongly agree to strongly disagree. When you create these bipolar scales you want to be sure that the ends are opposites. And because sometimes the, as we saw the example earlier where it was from poor to satisfy those are not opposites

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and would not should not be in the same scale.

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Frequently, the scales for bipolar are like strongly agree to strongly disagree or very not x two very x, or easy to difficult something like that.

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They're often called liquor type skills.

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The other type of rating scale is a unipolar scale, and this is different because instead of going from a negative to a positive or one extreme to another, it goes from zero to a lot.

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So here you can see, not at all helpful to extremely helpful. And the difference here is if you're asking if you want to know is the documentation helpful.

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You know, you may, if you, if the documentation was really bad and kept sending people down the wrong path. You may want to see if the documentation is unhelpful in that and it's it's making the task harder, but typically for something like this.

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There's not really a negative component to it it's either not just not helpful, or it's on the scale up to extremely helpful.

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So those are the two sort of formats of scales that we think about one thing about the unit polar scale. Here's an example how useful would you find the following content formats.

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And this is a brief overview. Now the scale is not useful at all somewhat useful. I learned there's this neutral in the middle.

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And then it says useful and very useful. And there's a couple of problems with this.

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First of all, neutral doesn't answer the question, how useful would you find the content, neutral, you just wouldn't answer that.

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But more importantly, it's not on the continuum. There is no neutral between, you know nothing and a lot.

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You could have an opinion option you could have a not applicable option, but those should be outside of the scale at the end.

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Okay, the next thing I want to talk about is the size of the scale how many response options should there be

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in general scales with three points are probably don't give you enough response options. There's not any intensity, if you're thinking about a bipolar scale, you'd have a negative positive neutral and a positive.

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So there's no kind of valence to that.

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What ends up happening is, is there's a lower reliability, probably what's happening is people would think well I'm a little bit positive so I don't know if I should select neutral or if I should like positive.

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And so, different responses would select make that choice differently and so you get kind of not great data, whereas if you have five points you have an option for you know a little bit positive.

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Either I I like five point bipolar scales.

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I for UX work I, you know, I don't know that people need seven options but that seems to work well. And it really depends on the survey.

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And so think about the respondents the contact, text, and the construct that you're measuring.

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In particular, for some constructs experts may be able to differentiate differences and may be able to may be able to take advantage of a large larger scale.

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I turned to actually like four points on a unit polar scale which was this example here.

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It's really hard to find an i mean maybe you could have like a little helpful might be a good option between not at all and somewhat, but it's hard to know how much those how different those are so I tend to use a four point scale for unit polar scale

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but again that's that's up to you.

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One thing that the slides are the rating scale does determine is whether there's an odd or even number of options on bipolar scales an odd number give you a midpoint.

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And there's a lot of discussion in the survey methodology world about whether you should have a midpoint or not, with some concern being that people will just choose that, because it's easy.

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I for me in UX work, I think a midpoint is a valid response and I think we should give it to the respondents.

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So I almost always use a midpoint. If there's something where you really want to know which way they're leaning, and you want to force them to choose.

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Then you can do without the midpoint but personally for the work for most UX work I think a midpoint is is helpful.

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Response labels.

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Should we label all of the response options.

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If you've got a scale like frequency. That's where the intervals are not equally, because you might be talking about rarely annually, monthly, weekly, daily, so those are you really want to label all of those because they are very different.

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If you've got a subjective scale like, you know, agree to disagree or usefulness you know it may be okay to, to just label the endpoints, but you do at least need to label the endpoint anchors.

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I tend to avoid using numbers. I prefer text labels, because I, the numbers don't really provide any meaning.

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Beyond letting you know that they're sort of intended to be equal intervals.

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So I don't use numbers very much but if you find them to be meaningful, you know, that's okay. I do avoid negative numbers because there is a.

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People don't like to be negative, they don't like to pick negative so unless there's a reason to use it in your survey I would recommend trying, trying to just text labels, as possible.

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We talked about making sure the scale is balanced here is a bipolar scale from agree to disagree.

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You can see that it's maybe not balanced.

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There are three agree options and to disagree options so sort of by default. There are, you're more likely to get an option where the respondent agrees, and also the agree options are very strong and the disagree is not a little bit more milder.

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So be sure that your skills is balanced and you have the same number of positive and negative options.

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Okay, the next thing I want to talk about is ratings versus rankings, and this is an issue that I think this is really confusing sometimes because I see people talking about ranking when they're mean rating and talking about reading when they mean ranking.

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So in a rating. It's where you're selecting a value for each item.

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So you're using the scale you're providing a value for each item on the list.

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In ranking. You're going to take all of the items on the list compare them against all of the others, and determine an order for all those items,

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and to sort of give you an example of what can happen when they get confused.

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Here's a question that unfortunately I came in to do the analysis on. So the question reads, you're going on a diet and need to stop eating certain foods.

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Right. The following foods from one to 10 where one is the first food you would give up and 10 is the last food you would give up.

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So, normally in person I would ask how many people think this is a rating question and how many people think this is a ranking question.

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You can think for yourself what you think this might be.

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This is not the question that I got but it's a sort of generic representation of that question.

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So, I have to look at the data and determine whether somebody had ranked the items or rate of the items. It turns out that 57% of the respondents rank them.

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37% rated them.

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2%, I couldn't tell. Because what I did was, you know, if they rated that if they gave everything attend like I'm not giving anything up, and then that was clearly a rating.

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If they used one through 10, one for each of the items that was clearly a ranking.

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And then looking at kind of working my way towards the middle of, you know, if there were a bunch of 10s and a bunch of nines, again, that was a rating.

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If there was a good sample of a ranking scale or ranking like 113456, you know, that was clearly a ranking.

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But then I had to do the analysis separately because you couldn't, there's not a good way to combine them. So

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a good lesson for reviewing and testing questions and making sure not only that people understand them, but they you are able to use the data from the question

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ranking is difficult, because it requires so many comparisons, it's not just dealing with one item at a time but one item compared to all the others, then the next item compared to all the others so it can be really difficult especially with the longer

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list.

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Sometimes the data you get online before because if you've got this is ranked the ranked first and this is ranked second you don't know if they're like really close or they're really far apart.

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So that may not be so useful.

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I would recommend if you can use ratings instead, and then develop your rankings from the average ratings.

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If you do need people to make decisions, then I would recommend rankings for example, if you're looking at, we've got this new money What is the next feature, we should build.

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Then you want people to make those difficult decisions about which is first, even if the second one is really close behind you still need to know what they think is first, so that would be a case where ranking would be appropriate.

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So double barreled questions we saw that a little bit earlier in the example. It's where you are asking respondents to provide a single response to what may truly be multiple questions.

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And here's one that's like really a quadruple quintuple double barreled question says how would you rate your ability to plan and evaluate to organize work set priorities and determine the resources you need to accomplish your job.

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That's a lot. for one, reading,

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typically what happens is people start right these questions assume that all of these things logically go together and will have the same response that may or may not be true.

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And it's important to think about that before you commit to what to a double barreled question.

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In order to address double down questions, it's important to find them first because sometimes they can be a little bit sneaky and you may not recognize that they're double barreled.

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So I would recommend watching for and and questions and seeing if you think it really is a double barreled questions.

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If it is sometimes it's easy enough just to break them into multiple questions.

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Sometimes you have so many that ends up being a lot of questions if you've got a couple of triple barreled questions all of a sudden you have three six questions.

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Maybe what you can do is focus on one or two constructs that are most important to you and ignore the rest.

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Or it may be that, that it's okay that people really do think of these things together, and that you do on that higher level rating, and so and so that's fine.

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And so just be aware that that's what you've done.

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The last item of for writing questions that I want to talk about is agree disagree items. We use them a lot. I use them a lot because they're easy to write.

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You can cover a lot of items in one scale on one grid on one page.

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So that's seems really great.

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The scale is pretty standard people are familiar with it we see these kinds of questions everywhere.

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A couple of things to consider about them, though, is that in some cases people like to be agreeable, so there may be the acquiescence bias where they're likely to want to agree with whatever you're saying.

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They also require an additional level of cognitive processing because you have to translate your response, not just to a scale, for example, easy to difficult but to and agree disagree scale so that may not be so difficult but just something to think

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about as you're writing your questions. So instead, as, as you're writing agree disagree items I suggest avoiding qualifiers like very. In this example, I thought the task was very easy.

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What ends up happening is it you know if this question said I thought the task was easy. You could use the like strongly agree with kind of back to it was really easy and agree with Matty easy.

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Whereas when you've got this very easy here like what if I thought it was a little bit easy, like how, how do i do i just agree with it or do I disagree with him because I didn't think it was very easy but I thought it was kind of easy.

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So, if you avoid the qualifiers in the statements that will help clear up, make the, the responses a little bit more clear.

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If there's a good alternative, consider construct specific response.

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So, for example, here's the statement. The product was easy to use. So instead of using that you might use very easy to very difficult scale with a question What was the product easy or difficult to use.

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Another advantage of this approach is that the responses the construct you want them to evaluate is in the responses so it's another queue of what you're looking for.

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You may not want to do this if you have a lot of items you want input on because you can end up with a lot of different scales.

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But it's something to think about.

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Okay, so I'm summarizing the best practices for designing and writing questions. I'm consider the survey as a conversation with the respondents. Be sure that the responses match the question.

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We didn't talk about jargon at all but avoided.

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Unless the respondents are familiar with it, and they expected in which case you should absolutely use it.

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Use the required questions carefully rating scale options should be evenly distributed balanced and follow a continuum.

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And for rating scales. Consider the text labels that you want to use make sure that are appropriate for the question.

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Either anchors only at the end, or labeling all of the options.

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Be sure to include all of the possible options.

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Be sure the scales are complete, that you that you cover all the full range, and use don't know not applicable no opinion or other up as appropriate.

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and keep them separate from the scale itself.

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If you can use rate ratings encourage ratings rather than rankings their little bit easier for respondents. Avoid double barreled questions, and consider using construct specific formats rather than I do disagree know is that fits into your survey.

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So there's one last thing I want to finish up so we have some time for questions but testing the surveys, we want to be sure that the questions are measuring what we want them to measure and just like any other design effort, whenever we use designed

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best practices but we still do usability testing. That's what we want to do here we're going to use survey design best practices but we still want to test the survey.

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Some of the kinds of problems that you can run into. you can have complicated instructions and question worrying so that people don't know what you're asking.

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You can be using unfamiliar jargon, you can make incorrect assumptions about what your response know, or what they can have access to. You may find that some topics are sensitive that you hadn't expected.

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And so that may impact their interest in completing the survey or ability to provide reliable responses. Some questions may be difficult to answer.

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People may interpret things in a different way than you expect.

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And or there may be answers that are difficult to recall there's a lot of other things that could go wrong as well. So,

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as a first step, review the survey in whatever tool you're using, just to make sure you don't catch you catch everything glaring, because if you're going from people to an art paper to an online survey, it may look different and feel different than it

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does on paper. So here's just an example of clearly there was a cut and paste issue where they used a grid for question they copied it, they didn't change the grid they just change the rows.

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The question is, does your institute provide mandatory or optional information security training, and the column labels are yes and no and then rows are basically yes or no options so that would be caught easily when you take a look at it.

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To test surveys we use a method called cognitive interviewing. It's really similar to usability testing but with some important differences. I did a paper with some colleagues, that's in the UX pa magazine.

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About a year ago on cognitive interviewing and comparing it to usability testing that will give you some additional ideas about what to focus on in cognitive interviewing.

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Basically the format is similar you have the participant complete the survey, then you ask them some questions. And then you interpret their responses and figure out what was working and what's not working with the survey.

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These questions are what the survey methodology is called probes are it turns out, really the focus of the analysis.

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They're not so interested in the behaviors.

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They're not so interested in, like what their responses were, they're more interested in what their responses to the probes were because there's no way to know if their responses to the questions were right or not.

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The approach that they ask are things like I'm in your own words what is the question asking, what did you consider in determining your response were their responses that you decided not to use or were there.

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Things that you decided if you're asking for account where the things you didn't include in your account, or there anything difficult about this question so this is where the bulk of the rich qualitative data for the cognitive interview comes from.

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So in summary, decide what you really need to know and write the question for those topics. Write the questions following best practices and then always test the survey.

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And that's it and hopefully we have time for a few questions.

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Yeah, Jane Thank you so much. Oh, there's a lot there that was so fantastic.

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Oh, the. I'm just blown away.

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Let me just say that, uh, let me pull up the questions here.

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We may or may not be able to get to all of them, but we're going to we're going to start throwing Dean some questions so if anybody has any questions please throw them in the chat and we will add them to the list.

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So, Gene the first one where can people learn more about survey sampling.

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Oh, okay.

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All right, I hate to say it depends, but I would start with Carolyn Jarrett's work, because that's really tailored to a UX audience.

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If you want to get more into, Like the statistics on it.

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Then there are

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GPS.

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The joy program and statistical methodology, I think, has some short courses that there is probably one on sampling. That's not my area so I haven't, I haven't followed it so much but from a UX perspective I would start with Carolyn's book and and she's

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got some presentations online is a good starting point.

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Okay, great. That's perfect. So gene.

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Do you have any tips on wording, or ways to write questions to make synthesis easier. Like, if you want to try the, the example is if you're trying to avoid open ended questions so the data is clean or graspable.

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Yeah. Yeah, that's a great, great question. Um, there is a good trip for doing that, which is, if you can, you can do some pilot testing with the open ended questions, and depending on your sample size a couple of people.

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1520 I not, I don't know how many you'd need, but you can ask the open ended questions and you can see what kind of responses you get. And then you can create those multiple choice options from what you're seeing in the open ended questions.

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And that will give you a starting point to help you kind of narrow down the analysis in the end because they'll go have some categories that makes sense and that will be based on data that you get from from your target audience.

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All right, great.

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So Jean, how do you feel about NPS.

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Oh gosh.

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As a government agency we don't use it. It's kind of a weird thing to ask like would you recommend BLS to your friends.

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Like, if they were interested in the inflation rate you might. So we don't use it.

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I know it's very controversial I don't have a good answer about yes use it or no don't use it.

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It's it.

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To me it's not, it's not the question I'm most interested in.

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Like I said, there's so many reasons why you would or wouldn't recommend a site that I don't know what that tells you, but it. I know people are.

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It seems to be useful in a lot of areas. So, I'm sorry. I shouldn't have more it's just not something that we use in the government and our agency at least.

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Sure. Okay, that's great. So,

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are you ever do you ever have any concerns gene about over planning how to analyze your open ended questions. So, the possibility is a biasing yourself toward different categories or results versus organic affinity mapping.

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Um,

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I guess not.

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I don't that.

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I don't think that's been an issue for, For me personally, it's probably something I should think about more, but you know we just kind of go in and do analysis like we would for any other qualitative data and just kind of start developing categories

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that will continue to change as you go through the analysis.

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I think you just have to be objective as you do it.

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Okay, great. Thank you. So are there different considerations for different countries or cultures, or languages that you'd like to point out.

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Um,

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yes, probably, especially in terms of the design of the forum, there's been a few think of the survey as a forum there's been some work done for international audiences and different cultures on on how, like, where the labels go like usually above the

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box works for more cultures then having the labels to one side or the other.

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Again, most of my audience is the US and that that's probably a little bit of a cop out but so that's not something that has been something that we've had to focus on.

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But there are, that is probably something I should look into some more so I don't have a good answer but there are some concerns at least in the design of the survey for sure.

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Have you ever had to design any surveys and multiple languages. I have not. No Okay, okay.

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So, how do you avoid cognitive overload. When it comes to surveys

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that gets to the question of determining the topics that you have in the surveys and making sure that you are only including.

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What you really need. And it's, I have one survey that I have in my mind now that I'm thinking of that I'm working on this really long.

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So I know that I need to cut it and I bet it's so hard because it's like those you gets kind of attached to the questions and so it, but really go through and and you know that if you test it with participants.

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You can see like is it really overloading the participants or is it a topic they're really interested in, and they're happy to spend some time on it. So I think testing, doing your best to make the survey as short as possible but then doing testing and

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seeing, you know, you could also find out which questions are the most burdensome. And then maybe consider eliminating those.

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Okay, great.

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So gene is there anything to consider when designing a survey that could be taken on a computer versus a mobile device.

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Um, yes.

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And I think a lot of what we know a lot of the best practices for designing on mobile devices are things that that we need to consider in the survey world, which is no paging is different and the selection is different than, you know, it may feel longer

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on a phone than than it does on a computer.

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The if you're doing a grid with, you know, rows and multiple columns you know that becomes a little bit more burdensome.

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On a mobile device and so the lot of the survey tools will adjust automatically so if you build a grid, it will display as a grid on a laptop but if you're on a mobile device it divides it into individual questions.

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And so that experiences is going to be a little bit different.

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So it gets gets back to making sure you look at it in all of the modes that you think people are going to be completing the survey.

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Okay, great. So Jane Do you have any sources of survey templates or survey samples that you like to start from or have as a frame of reference to get started.

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I, you know, I don't really.

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Most of us, most of the times the stuff we do is so unique that we're sort of starting from scratch and using kind of what we have learned in the past but not so much relying on survey questions.

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There is a government template.

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There was a group of from government US government statistical agencies where they were kind of sharing data, but I think that's.

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I'm not sure where that is. It wasn't something that we participated in.

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But so mostly know we unfortunately start from scratch or start from an existing Serbia that we're going to be revising.

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So I don't have any good examples. I know some of us are online survey tools has have examples to start with.

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And But I have to admit I have not used them.

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Okay, that's fair.

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So what are your thoughts Jean on having. Please explain your answer, kind of open ended question at the end of at the at the end.

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I think it's fine I would be careful about overusing it.

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I would also be careful about overusing please.

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Because we do that a lot like.

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So just.

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So it's, it's certainly appropriate we do want to say please read just be sure you're not saying please read for every single question because it gets kind of feel like you're begging a little bit.

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So, it just gets a little bit repetitive so I think it's fine to say please, please explain your answer because it just don't make it required they either will or they will get some interesting data that way.

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Okay, so what is the best way to measure how long the survey should be like the number of questions or pages.

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I think that gets back to testing, and looking with your target population and what you think they they'd be interested in.

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You know, for we do some of my colleagues do a lot of work in using shark.

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And so they're like the surveys are like, you know, two or three minutes and that's it and sometimes 10 minutes but you have to pay for that.

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So, There's no good like 10 questions and that's it.

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But I would try to, you have to think, I know I hate saying it depends. But that's also often the answer in UX is that you know how to think about to users, you know if it's a topic that really interested in and excited about, they might be more time

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and if it's for an organization that they want to support.

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So that I think there's a lot to consider but I think the testing. I'm getting a couple people to run through it even if they're your friends, just to get them to run through it and see if there's anything that's problematic.

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Okay.

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So, Jane We had lots of questions about the bipolar scale.

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Does it do you have a recommendation foundations on like the the negative being on the right or the left the small being on the right or left the setup of those kind of bipolar liquored kind of situation.

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I have been looking for the study, that would be a lot. The last thing I read was from measuring you and their conclusion seem to be that it didn't matter a whole lot.

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There is a little bit of a bias to pick from the left hand side.

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But I don't think we have the answer on how it should be all the time and it's something that I struggle with it for every survey.

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Because sometimes neither one seems right.

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I do and usually if you've got like a single question and the scale the world economy of makes sense. The only I I sort of struggled a little if you've got like, I don't know if you can even see my hands but the item on the left and then the scale on

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the right, where you kind of want like what's closest to the scale to be most relevant to the scale. But usually, I do put negative on the lack.

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Okay.

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And okay and low numbers to, you kind of put the low, low numbers.

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Vertical scales are

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complicated to like I don't know if it's.

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I guess you'd put.

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I don't know maybe it depends on the topic whether you put the low numbers on the top or the bottom.

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Okay.

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So, Gene what's a good sample size to be considered like an accurate.

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Finding accurate data finding. Um, it depends on the size of your universe.

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If I do a lot of work in house where for our analysis systems where we've got, you know, 40 or 50 users. And so if I can get input from 10 of them that's a great sample.

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If you've got a million users.

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You know you're going to probably want a much larger sample.

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It also depends on.

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As with sort of usability testing if they're more homogeneous. You probably don't need so many, so many responses.

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Have a good answer I should.

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I'm sorry. No, no, that's okay. Yeah.

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Usually it's usually it's as many as you can get

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it for.

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Yeah.

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Yeah, as you mentioned earlier it's, there's no silver, silver bullet to get people to fill in a survey right so you do the best that you can. Yeah.

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Okay, maybe just a couple more questions Jane. Okay, cool. So, so what are the rules of etiquette about the types of questions that should be required, you have any.

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Um, I for, especially UX surveys I like to keep them really to a minimum. And so, if you've got, if there's like one question like this is the question that you really need your, an answer to that should probably be required because if you don't have

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God then you have no data.

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If it's a screener where it's going to determine which path you go down.

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And there's no clear path. If they don't pick something that will need to be required.

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But in general, I tried for you extra days, try to make nothing required except for those two critical, or that will determine the path forward.

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Okay. So, do you have any resources or recommendations on how to analyze the data from surveys.

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I will let me get back to you on that because i think that's that's that's important, and

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I work with a lot of statistician so that's, that's my resource, but that's not very helpful to this to this audience.

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Yeah, if it's okay but let me get back to you on that I, in general it's, I think of it as either quantitative data or qualitative data and so whatever approaches you use for those methods would apply like the open ended questions aren't really just qualitative

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data and however you analyze qualitative data, looking through finding themes.

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And sometimes you have to go back through because you find things later on that you didn't recognize earlier in your analysis.

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And it also depends on how many participants you have for the quantitative analysis that you need to have enough responses, if you're going to do more in depth statistical analysis you need to have enough participants to be able to do that.

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All right, great. So last question gene is about offering incentives like rewards gift cards.

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How did. How do you feel about that, and does it introduce any self selection bias, and do you feel like it increases completion rates. So what are your thoughts around incentives.

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There is some evidence that incentives do you help.

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Typically they're given.

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When you send out the survey. Well, I should say a lot of the work was done on paper and so those were sent out with the survey.

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There is some evidence that they help.

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We generally are not allowed to use them in the government for surveys.

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We can use them for usability testing but but not for surveys, so I don't have much experience with incentives in surveys myself we tend to be more focused on the language we use in the invitations to encourage people to participate.

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And we try to give them.

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Like, as I said, other incentives are.

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Here's our great data that we have.

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It might be really useful to you and sometimes that works.

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So, I don't have any specific data on incentives. They can be helpful in certain situations. I don't know how though they impact the results on that that is a good question.

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So we use them for usability testing to, and I don't know if there's much research on how they impact usability testing.

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Yeah. Interesting. All right, I had one more late breaking question gene and then, and then we'll wrap the questions up.

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When should you prioritize a drop down but choices.

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Over showing all the choices.

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Yeah, I.

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It depends on two things.

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One is like how many there are and that's that's the crux of the question but it also depends on the layout, and how much room you have.

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I like, I prefer to show all the options, because it helps clarify sometimes what the question is asking, but if it gets much beyond four or five that I would go to a drop down, myself, but there are cases also there, even if it's just one or two, one

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or two, like two or three or four options you may not have the room for for showing all the options.

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I, if you if it's just yes or no, I kind of don't like having that as a truck down unless it's clear that there's a space issue.

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But yeah, I would say four or five, you know, it depends on you know if you've got six.

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You know, if you've got the space I might consider putting them I there's not really a one, one cut off I don't think of. After this I would definitely mean after know probably 15 I would definitely go to drop down but there's some gray area in between.

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Okay, That's fair. Well thank you again gene everybody give her like a visual or emoji applause because this was a fantastic presentation and she gave so many great answers to your questions.

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So thank you so much.

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We are going to hop over to the networking portion of this evening. So jr welcome to join us so you're welcome to step aside for the, for the evening.

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Again, thank you for your time and we loved having you. And for those who are interested in networking, stay on and we're going to go ahead and pull up the questions and transition to that.

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Thanks again gene. All right, thank you. I can stay on for a little bit. Okay, great. Awesome.

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All right.

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Gene but I have to ask there we go I have to ask you to stop sharing for a second. sorry I thought I had done that already. Nah.

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Well, it didn't think so but now we're, we're good. Thank you.

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I'm going to share my screen.

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Right.

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So we have a few house rules for our networking.

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So, we're going to break out into two breakout rooms for 12 to 15 minutes into smaller groups, and we're going to have a couple different topics that we're going to talk about.

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And we ask that everybody treats, each other with respect and give everyone a chance to speak, and have your. Have your LinkedIn.

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Did I skip beside my have.

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Nope. Okay, sorry about that. I'm just want you to be kind empathetic treat others with, with respect and assume positive intent so no negative comments.

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Alright so for the breakout rooms.

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We're going to ask that you get your LinkedIn profile, your link to your LinkedIn ready because we have you drop that in the chat that just cut that just sticks in the chat while you're in the breakout room so get that ready so that you can that can connect

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with people in your chat.

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And so for the first room we're going to have fun question what do you like to do on either a sunny day or a rainy day. So just something a little silly.

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Have a good time with. I'm going to go ahead and start setting up the breakout rooms.

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And again, we'll just do like 12 minutes or so we'll come back see how that time works for everybody.

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And then we'll come back to this lot to the main lobby and see.

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Have a quick transition and then we'll do the next question so you have to join, so have your LinkedIn profile ready, and you're going to say your name, what your specialty is are you designer researcher or strategist, and then the first question is,

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how do you like to spend a rainy or sunny day. All right, going to go ahead and create the rooms.

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Here we go. Hit join.

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Certainly way to allow the name change to change our display names are now. I believe you just click on yourself and under the option three dot option, it says to rename.

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I think the moderator as to allow for that for some reason it's probably checked off is not allowed to do that.

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Just to break up.

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Yeah, we've had some.

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We've had one problem with the past. So, Yeah.

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Yeah, sorry about that. I don't see the option to change that.

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But this is when we have people raise their hand kind of form a queue and just ask the community a question, and anybody who has an answer, can answer.

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So, you know, we just ask that you give other people an opportunity to thank you for re recording that again, people were like this happy hour apart.

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So, if anybody has a question go down to the reactions is the reactions and raise your hand.

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In the emojis at the bottom, and raise your hand and we'll start shooting questions out of the people.

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I know people have questions. Come on, don't be shy.

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All right.

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We have one summer hot summer here, summer her. Forgive me if I'm, I'm ruining your name Hi. Hello. What's your question.

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So I'm actually in the process of looking at survey tools. I know we didn't. That wasn't the focus of this.

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But I'm curious and looking at call tricks for example I'm curious if anyone else has experience using different survey tools and why they might be good, or why not.

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I've used call tricks, a little bit, and so often on for about two years depending on when I needed surveys, and it was difficult to figure out but once you figure it out.

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It is an incredibly powerful tool.

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I've also used Google Forms but that it doesn't allow you to customize with branding so it doesn't always look as professional as something like well tricks that can be customized with branding.

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That's super helpful. Do you use any tools for like, one time. One time surveys or is it like a member, a longtime contractor. And they'll be my final question.

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I do think that politics is a long term contract with the whole company, and anyone else please speak up if I'm not correct about that, um, Google Forms is a one off type of thing.

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I've also taken surveys and type form, which I think it has a very clean interface. I didn't notice anywhere to do branding with that, but it seems like much cleaner and a little bit more professionals and then Google Forms.

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Yeah, and I've used Survey Monkey too but they keep their like optimal sort of they keep changing their business models so I think you used to be able to like pay for one survey, and now you may have to have a subscription.

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And there's different tiers and all the things.

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Their tool is is kind of falls between Google forums and qual tricks it there's some logic you can build in, there's some display logic, you can have, but it's not as powerful as politics is and, and it just depends on if you have 40 or $50,000 or however

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much clutter exists these days to pay for it. Ask your marketing department if they'd like to share licenses ask product if they want to share a license.

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So see if anybody else can can put money into the bucket for you to get a big tool and then you can share some of the seats with them to that's always an option.

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I was gonna, I was gonna like it that I think, if you have some of the wealth of your other research insight disciplines to, co spread around your tool because politics is incredibly powerful.

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It's even more powerful if you have like a market researcher that can help you unlock a little bit more of the, you know, whether it's kind of like conjoined type tests to even even been kind of scale that insights that you might have from one particular

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of research, but it costs a lot type for my views kind of in a pinch as well they look like someone said it's kind of like in between Google Forms and and and politics who they are, I feel like type woman's fairly straightforward and that's the surveys,

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out looking great and some of the quick analysis that comes out of it is fairly, it's fairly easy to consume as well, but it's also not as customizable as the corporate platform but the politics platform has so many things you can, you know, you can basically

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build a panel. And over time, you know, it kind of turns into kind of its own kind of CRM for for your users. But again, I don't even know how much they cost to Lori's point.

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I think the cost is, is very dependent on number of licenses and, oh you're a big organization you got deep pockets we're going to charge him more like it's very, you can go on his site and see oh this is what they charge I think that every content with

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those with those services I think they're very custom.

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So,

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this is a, you know, as far as the face but you can always use like Power BI which has a free version, and that gives you good you know descriptive data as well at our place you don't use, we run all around statistical models wedding, like will use SPSS

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SAS, or we write our own Python models for, because what I find limitations with all those, whether it's Google survey or you can't write any model comparisons to do predictive programming really, so we use only statistical analysis and not not not can

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not not just not can output is one thing, but it is pretty

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cool. Thanks. Thank you so much into that, for sure. All right.

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Great.

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Thank you, Stephanie you're next up on my screen, what's your question.

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unmute unmute new.

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Hello everyone, I am, I have a degree in web design and I haven't designed a website in about three or four years.

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At least not on an ongoing basis. I'm a caregiver now so that's pretty much my full time job but I really want to get back into actually user experience design.

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I do have some experience. Well, I have some exposure to user experience research that's really not the area that I want to get into.

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But since I'm just kind of getting my feet wet again, I was wondering if you all had some would like to share some knowledge as to where I could find resources, because I know that the industry has, has changed quite a bit.

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So I'm pretty much starting over again.

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Stephanie what kind of resources are you looking for.

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Oh my gosh, I honestly, you guys are the first resource.

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So, but but mostly I started with.

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What is it, XD with wire framing.

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But really, kind of like, I don't know where to start because I kind of feel overwhelmed on my in my search

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it right. Am I that I hear correctly, you want to do product design user experience design product design or web design, web design or product design they're two different web design, web design so by web design it really is, I would say, okay, product

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design, there's so many different things you want to code, or do you just want to draw wire frames and do a visual design, just to create but you want to use tools like fig my sketch Adobe XD yes Adobe XD and fig mine Yes, I would recommend taking some

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classes from a general assembly, they have boot camps they have classes and meet all the major cities in the US, I would start with them and then I mean you could do a Google search many universities like of course Sarah has, you know, classes from all

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universities in the US and Western Michigan Stanford Harvard all the big schools. But I would just if you're just starting to refresh some of the knowledge that you have general assembly I think quality instructors and reasonable pricing.

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Okay. Also General Assembly is good if you want the boot camp is good if you want to put together a portfolio or update your portfolio, but kind of, you know, help you with that.

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And there's also LinkedIn learning some LinkedIn learning.

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Okay, thank you. And if you have a premium account they're free.

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Okay, I have to do that.

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So Google just came out with a UX certificate as well for online, an online course, if you want to take that for UX. I've heard practicing I haven't taken it but I've heard good things, so might be worth checking out.

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Yeah, sorry i think that i think that's a I think they're on Coursera, I believe, and I think that's a good resource to start with because it's free, like General Assembly's pretty expensive.

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So, that Google certification is very beginner level. I, at least I thought so. And it is a good overview of the different aspects of UX and that might give you an idea of what you actually want to deeper dive into.

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Okay, so you can go on to Coursera, and just audit the course to just watch the videos, and there's other courses that you because Coursera is not free for all the classes either.

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I think Scott Clemmer is class for an interaction design is really good on Coursera as well.

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But I would you can a lot sometimes you can audit the courses and just watch the videos for free so that would be my recommendation, and sometimes outta me also has some videos that you could, you know maybe 10 $15 for and just kind of get a get an idea.

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I know I been.

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There's for every question you have there's a million resources to be thrown at you so it's really difficult when you're like I want resources, I'm like, Oh my goodness, Google, I mean there's a resource you know but I know there's a million things on

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there that you may want to think about do you Is there any kind of specialization that you're interested in, or do you just like are you interested in just being a general web designer or if you have an area of specialization then you can hone your, your

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learning to that.

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Yes, I think I'm going to start kind of broad not too broad. But then kind of narrow, narrow down to one specialty.

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So, Stephanie I was gonna say it wasn't your question you're kind of looking for places to go, but I think the people that you can find to kind of help guide you in this process is going to be, you know, worth 100 links.

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Because, you know, the answer is it always depends, and that there there's a lot of reasons for that. So I think having someone to help you kind of just navigate this world, and someone that knows about where the ends are they really aren't but that in

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like meetups, you know, a lot of them are digital now too and there's a lot of mentorship programs that happened through that but okay place you're doing it, you're doing great.

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Thank you.

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Yeah on Christians comment ADP list is a good place to find a mentor, free.

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There's loads of designers on there you find yourself a UX designer, make some connections and make some relationships and ask for some guidance, you might get a few different opinions but I think that that that's a good place to find a mentor.

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Great, thank you so much. I really appreciate the comment as far as using looking at LinkedIn learning at Coursera, depending on where you live. A lot of those programs are free access to your library system so if you have a library card.

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I don't know your area but most areas if you have a library card you can use your library card and get all free access to all that information. Oh, I will get one.

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And so I've got a question, how can I encourage product managers to write better surveys. So I have here are some things that I've tried. I've shared some articles that stripe has used that also has a democratized research strategy I have.

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But, you know, talk to people and help them write a couple of surveys, but I would love to start, everyone who has a product manager writing better surveys.

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So if you have any strategies about how to do that, please let me know and have any success stories yet Lauren, for the people you've helped. Um, so, I have some success with ones that I have very specifically.

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Right.

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And so, and then I've seen people who have been successful, come back and ask for help on the next one.

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But in terms of like a broad.

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You know system change, I have not been successful

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program managers be inviting surveys product managers should they look, they don't have any data, and when there's only just one of me, I just can't write all of them and you can't either but like when it comes from a product manager sometimes it's different

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than when it comes from a UX researcher.

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And you could try that.

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And I would, I would keep, keep up the mentoring, bring me your questions, let me help you.

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Bring me the things that have failed. Let's talk about why those questions failed, why those surveys didn't get you what you were hoping to find and continue to keep, keep fishing for new opportunities to help them, because that's the only thing that

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I've ever seen truly make a difference. The more they can experience what a good survey looks and feels and gives them data like the more the one fact.

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And the more that they'll learn and they'll really internalize what you're trying to teach them.

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Yeah, I think along those points so I'm not a researcher but I'm, I'm trying to convince by product managers to kind of step away from the survey and lead researcher write it.

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And for the purpose of when it's done properly, it can answer questions that you don't even have yet, and all keep feeding kind of the questions for the next year.

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Actually not happened before so it's kind of like proving out. What a high quality survey can do.

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But I guess I would only lead to open your find more researchers on your team or something like that,

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which will be a good thing.

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Yeah. Are you able to review their questions and maybe work through. Like, why double barreled are leading questions, don't produce the data that they're hoping for.

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That would be pretty great if I could, but there's nothing stopping them from doing 100% no surveys.

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But,

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oh, sorry, is the problem is that they're just popping up a bunch of window pop ups, and they're just like for every little thing that goes between color and now.

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customers but there's no checks for internal ones.

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And the check for current customers is going through marketing.

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Because marketing controls the are mostly controls like that front of site.

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Does that answer your question.

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Yeah, um, maybe like to what Laurie was saying is, come up with some success stories of showing the value of surveys coming out of the UX research department, not just the marketing department and show the difference in the data that you get.

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And, you know, how is it actionable, versus, maybe not. I mean I don't know the questions you're asking but if you're very intentional in the survey that you design and you really provide data for the team to take action on, I mean that is a good success

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story that you could be circulating.

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Sorry Cindy I cut you off earlier Please go.

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I was gonna say that we experienced like a similar problem at my organization and what we ended up doing was when we went into our next contract with Survey Monkey we basically told them that anyone that wanted to use our domain, to create a survey have

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to ask for 30 to 30 Station. So, if Survey Monkey has I'm sure like if you're using call tricks or some other product they might also offer that. And then we were able to basically like pre screen their questions.

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And then, or like help them, what we ended up doing because the surveys were like all over the place and some surveys were like, literally like 80 questions, like we just ended up working one with, like, one on one, one on one with them being like okay

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I need to create a survey, you no longer have access to like survey creation and just like coaching them and so there's currently at the organization there's like four people that we are like good with them creating their own surveys other ones haven't

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earned that yet but now they see it as if I want to do that and I don't want to wait for two weeks, well see me makes a survey. Then I have to be good at it.

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So that's like they're like current at the end of the stick.

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How have you not mine where you've

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had enough influence in the organization but you've said, okay, like everyone has to go through us, right, like so, I president marketing is like, you have to go through us.

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And they have like a lot of influence in the organization. Um, but right now UX research is just me, so I'm curious, like, what, what steps has your org taken to get to that point, what department are you in IUXUX but it's only you and who the report

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directly to I report to the head of design, and your parts to product that Vice President of Product, is he like at the same level than the marketing team.

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I would go to this the person that he's at the same level or head of the marketing team to be able to do that.

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So when we started having that problem.

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I am in innovation. My boss is the chief innovation officer and marketing, they only have a director, so we were like, your chief their director, we when

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we're there you go.

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I was

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just going to comment I've never felt very much success in fourth quarter about people's heads. But what we've done and maybe you can do the same thing more.

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We've done that, I don't know if you have an internal training program or internal Professional Development Series at where we're at, we offer internal training and professional development, and I actually actually come to this topic in my training.

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It's titled The six error. And if you're familiar with statistics, type, type six errors when you get the answer, but you ask the wrong question, and I think at the very first time that they realized that the question is really important more than the

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answer. So, but I do it through training programs. So if you haven't been sort of program of professional development.

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We can resolve it had been resolved with that in my organization.

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I've had been resolved with that in my organization. That's a good idea.

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Surely you have something you want to add. Oh yeah, I was just going to kind of add to extend these points you know there is like something that's useful in kind of creating a process, but kind of maybe positioning it more as kind of quality control but

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also like if you have 10 product managers all sending out surveys on their own they're unchecked right there's probably duplication of effort. And if they're, they're not quite, you know, up to speed on practices, probably not useful effort so I something

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that I think I've in past organizations is kind of partnering with that marketing person or that marketing. org to kind of be like hey you know we've got the survey stuff going on, you know, like maybe you can control maybe an informal gay to, you know,

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quality checks before they go out so you can maybe soft stack or control over that process, but then also kind of pitching. You know pitching the efficiency gains, if you are able to control the amount of volume of Product Manager surveys that are going

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out because then you can also start building a battery of questions and be like hey Product Manager, you know, Sam has this question but you working in this part of the company had this other question, let's you know let's kind of disseminate this particular

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survey in a way that answers both of those questions or, you know, don't send them together or close together because you're going to kind of mess up your sample.

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So I think there are some arguments that you can make an either partnering with that marketing person to kind of begin to control a little bit of that process but also for the product manager side, you don't want to kind of like discourage them to be

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inquisitive, but you also want to help them kind of be more efficient with their time with you as the partner and your marketing team as a partner so I don't know if that gives you some clear steps but maybe you know some way to strategize how you kind

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of get more control over that process.

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Yeah, yeah, yeah those are great points.

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I think the term survey fatigue has, has gotten some legs in our company at least because we not only survey our internal folks, way too much but we also didn't seem to our customers.

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So, your data quality is going down every time you do another survey, you know, on the same day, you know, exactly. So that was kind of my thought and then I also wanted to kind of double tap on thing, Lori was was saying where, you know, finding those

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champions, and those success stories, it's not even necessarily about you telling those stories, and that's something that I'm now realizing the power of a lot more like when it comes to my mouth gets hard different than if it gets heard from somebody

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peer right so.

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However, you can encourage those people that you are having success with to tell that story to other people that you're trying to get to, I think, that has a lot. There's a lot more to that than I than I ever really recognized.

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So cool. Thanks Kristen. Appreciate that.

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Um, Yvonne, you have your hand up next. Yeah.

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I'll keep my last question short.

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So, um, so I'm curious about any of you guys have experienced in doing user research and that's a possibility.

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And like, if so if what kind of resource like recruitment processes, and yeah,

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this is a good question. I don't get a lot. I don't have any experience doing research for accessibility I have experience doing design for accessibility.

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But I think, for accessing like participants to do research with. I think most agencies that were you can you know recruitment agencies would be able to to focus on that.

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I mean I think they have specialized ones that focus on handicapped and accessible needs people.

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So I think that that I mean unless you're working for a company where your clients are, you know, handicapped or, or have accessibility issues, but I'm pretty sure that any kind of recruitment agency or specialized recruitment agencies could help you.

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Yeah, my name dropped in in the chat but fable company I would recommend them.

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We recently conducted research that was focused on individuals with disabilities. And we had great success working with our, our usual recruitment agency that we work with, for finding our participants.

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And I think the other considerations that we took into play where some of the language that we use, especially in consideration for individuals using screen readers.

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Kind of prepping individuals but the tools will be using. So if you're using zoom, or any other platform or something.

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Wherever you're conducting your research, just letting people know how to be prepared to participate that was considering consideration that we also used.

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We also consulted with people, but were happily successful using our usual recruitment agency. So, Thank you.

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I think fable does a lot of like talks filmmaking to just kind of learn more about it. I know Rosenfeld media has brought them on as a sponsor before so there's their talks are available if you Rosenfeld media.

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com and you kind of look through their, their conference schedules they've had some good talks and they're always, I mean, for sponsors sessions they're insanely informative.

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Gotcha.

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Cool.

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Anybody else have one more last burning question before we call it anything.

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Bobby, your dog does I can tell by the tail. He's got a question. Yeah, go ahead.

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Do you guys have any sources on knowing which is the correct mythology to choose for a case study.

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To put into a case study or what do you mean like which method to choose or methodology methodology I believe it's, but it's also known as another was weird, because I'm still a student, and all of this is very new to me.

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And so one of the things that I've come across is ensuring that you have the correct that you're choosing the correct method when beginning a case study.

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And Google does a good amount of times but I just thought since Should I keep getting stuck in a loop.

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I think you're getting because you don't Google what methods you use for a case study.

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You have to start with the problem. What is the thing that you are trying to find the answer to, then you decide the method that will help you get the answers to that problem, then you build your case study around the with the, with the information that

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you gathered, as you went through that process. The case study is something that comes completely after you are done with the project of that is the research project.

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They are not the same thing.

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Oh, okay. Yeah, a case study is a summary like a portfolio piece it's a summary of the work that you did.

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So it could be a design focused case study or it could be research and you could have one method discussed in your case story or you can have multiple methods depending on what you did for the project.

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So I just threw a link in the chat Mike, I got it. Thank you, a video that our group presented on that talks about the different research methods and what to use when, so check that out and that will help you get a better understanding of just what I

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said what the different methods are and when to use them for what says what problem you're trying to solve like what I was talking about. And then when it comes to case studies, we actually have, it's like Mike it's like you to read this up, and you didn't

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even know it.

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We have Lori is going to be giving a talk here, is it March, February, right.

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March.

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You're muted, she said it's March.

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And she's going to be giving a lorry when you talk about it.

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I can, um, so I am going to give a webinar so this is going to be paid, like $25 or in your local currency, and it's going to be a whole presentation on how to actually create a UX research portfolio.

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We're going to go through the elements of what a case study is what you should have in it. We're going to go through what the heck do you do with your portfolio now you have one who's going to look at it, how did you, how do you use it to get the job

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that you actually want.

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And in a whole bunch of other questions like what do I do with a nondisclosure agreement, how do I show stuff I can't show stuff and all those questions everybody always has.

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And then we're also going to have a q&a after, so the last time I did this, the presentation went for like an hour and a half and I did q amp a for a nother hour.

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I think it was so I scheduled it from like five to eight. central time. So, we're going to have enough time to really get into the topic at hand and answer your questions for it so that is something I'm definitely interested in you said it was only going

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to cost 25 bald eagles Right. Yeah. And you have lifetime access to watch it so you can refer to it anytime you need to redo your portfolio, through it the link in the chat.

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The date is March 16th. So if you want. If you can't attend it live, you can still buy your ticket and then you can watch the recording later this will not be posted on YouTube.

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This will not be available to the general public. So this is a this is a very special event.

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Feeling special already.

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Alright, well, if that's it for the questions thank you so much for hanging out and enjoying happy hour with us, and hopefully we'll see you at the next networking event, which I believe we threw that in the chat that's February.