Making survey data more relevant for corporations

Why a one-size-fits-all approach will almost inevitably fail

Tim Macer meaning ltd

VOXCO Customer Day, Paris, 11 April 2008

Agenda

1. **Picking the right approach**
   Survey-driven and user-driven needs
2. **Integrity and ethical considerations**
   Is research data different to other enterprise data?
3. **Functionality**
   What specific functionality does the software need to offer, to respond to the challenges?
4. **Working with personas**
   Giving your users a face and a voice when designing online data delivery systems

1. Picking the right approach

Survey considerations: research types

- Ad hoc (custom research)
  - Exploratory
  - Market or competitor research
  - New product development
  - Brand health
- Continuous research or trackers
  - Mystery shopping
  - Customer satisfaction
  - Other measurement studies
  - KPI (key performance indicator)
- Quantitative, Qualitative or 'Qual/quant' hybrid

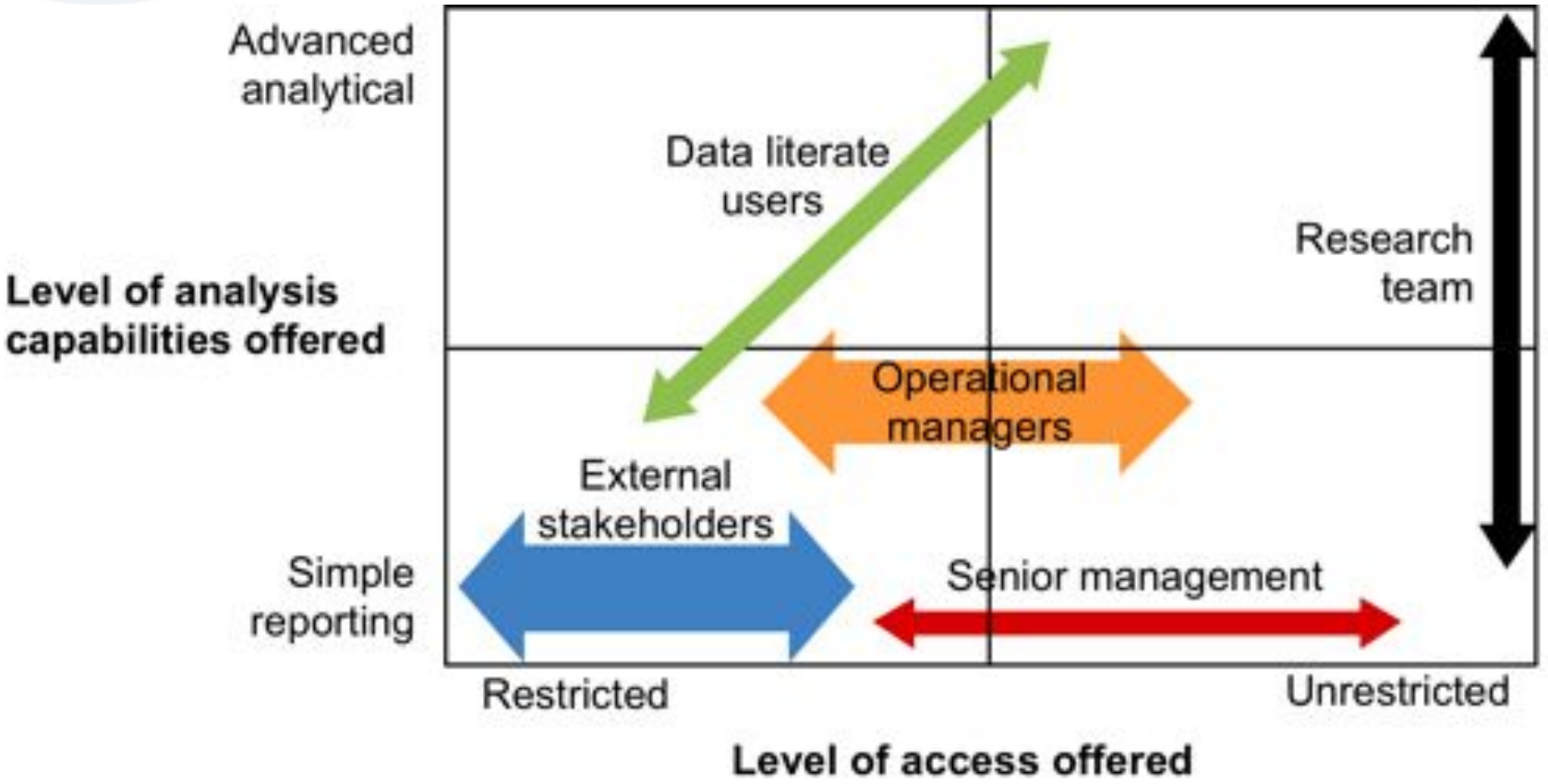
Data Usage Considerations

What do people want to do with the data?

- Ad hoc
  - support decision making, change management
  - explore, test and develop theories
  - consultation, listening to customers
  - review the recent past, look for similar situations
- Continuous
  - current performance with recent periods
  - own performance against company average or other regions
  - company performance against competitors
  - identify exceptions, islands of excellence, under-performance

Balancing access and flexibility

Usage model for a large enterprise



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The Resarch Enquiry Funnel

Model by Tim Macer

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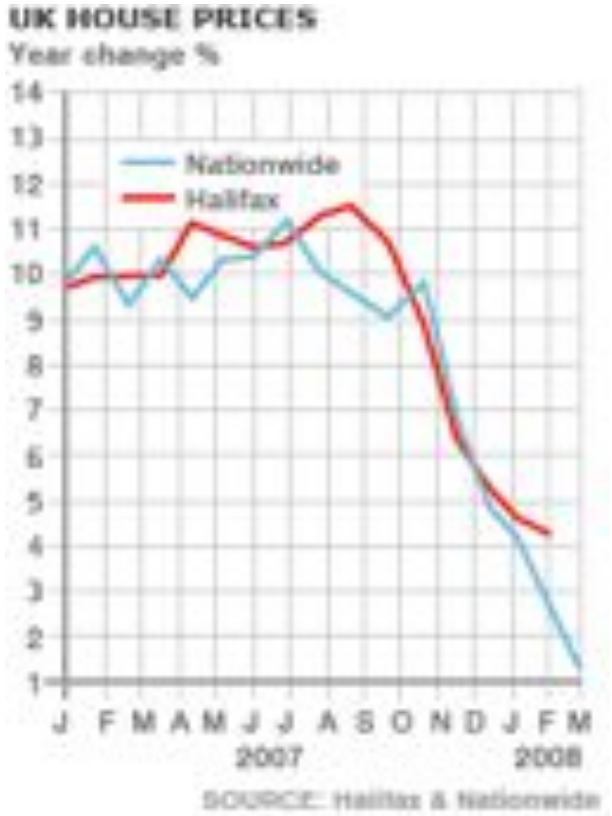
Shift in house price prediction



On the BBC news website
28 March 2008

2. Integrity & ethical

The user's comfort zone

- Often users *prefer* to use data that already exist
  - Our research has shown many may be nervous about producing their own analysis
- All software requires some familiarization
  - Infrequent use may mean it is always unfamiliar
  - Too many options makes the software confusing

Our responsibilities as research professionals

- Respondent confidentiality
  - Identifiable data should be removed
  - Have respondents added confidential information into openended boxes?
  - Can filtering make individuals identifiable?
- Sample integrity
  - Is there enough data to count up when filtered?
  - Warn or advise on low base sizes
  - Can 'rolled' data be 'unrolled' (=smoothed over several periods)
  - Can weights be turned off? If they are, what does this mean?
- Authority
  - Can end-users misrepresent your research in the public domain?

Consider creating a service level (SLA) and acceptable use agreement for end-users

- State what you will provide
  - Best endeavors to provide accurate data
  - Corrections you will make when notified
  - How long you will keep the data online
  - How long you will keep the data once offline
  - Who to contact with questions
  - Support hours and response time
- State what you expect your client to do
  - Attend training module (e.g. by Webex)
  - Protect passwords, not share them, inform of staff changes
  - Will not 'publish' any data without your permission – e.g. the media, press releases, or their websites

Remember!

Some users will only wish to view fixed data

Other users will only want to vary 'fixed' variables such as time periods

Other users will want to run additional analyses, but need to be protected from too much flexibility

Only a few will need to re-analyse data and produce new tables

3. Key software functionality required

What does technology offer

- Report libraries and portals
- Publishing of static reports (online)
- Dashboard and drill-down reporting
- Simple cross-tabs
- Complex cross-tab and analysis

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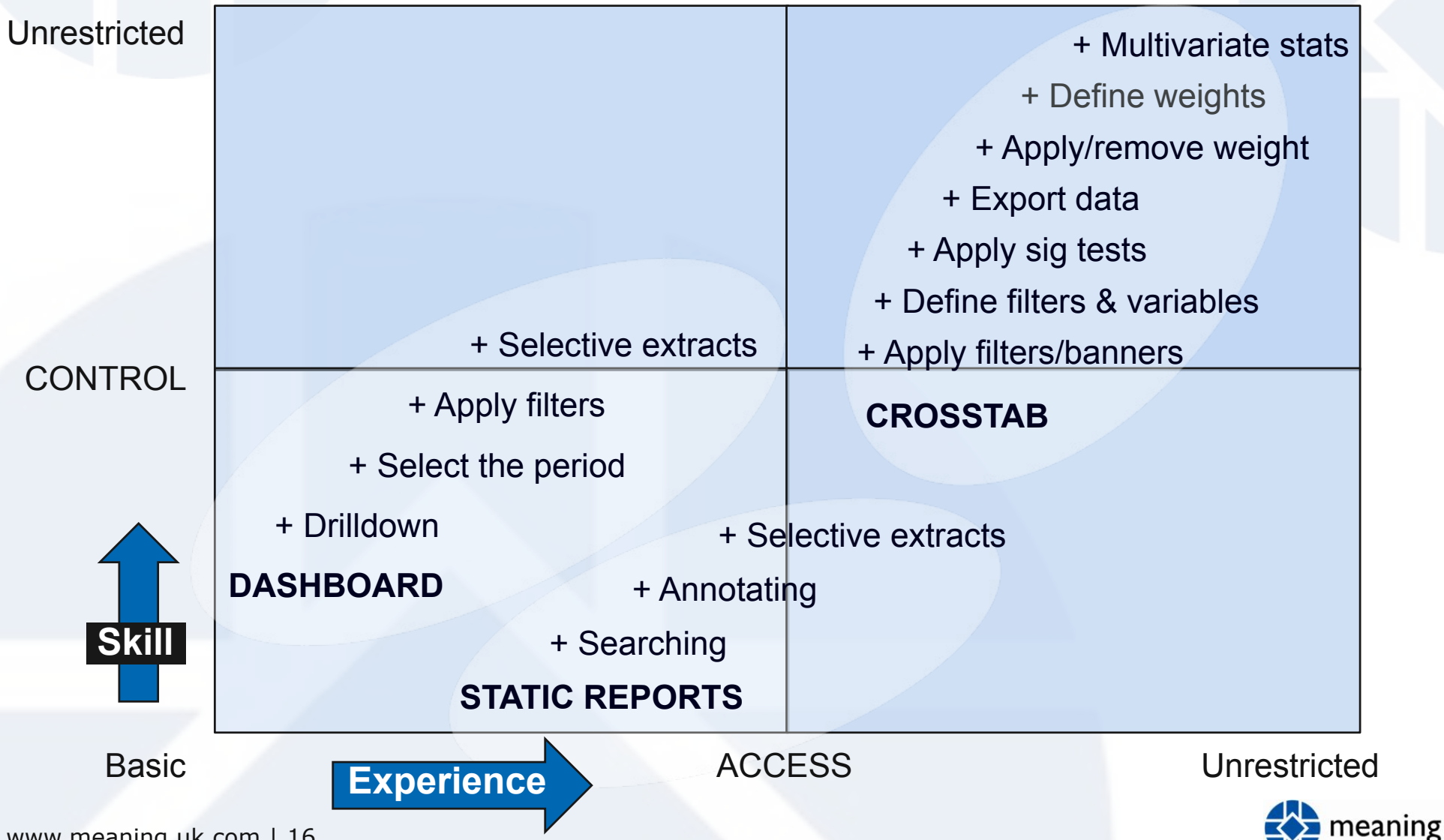
Choosing the right tools to deliver

Data consumers and end-users

Interaction required	Delivery route
'Desk research' Seeing what is available	▪ Searchable report library of static reports
Review commissioned custom research	▪ View static reports online ▪ Online cross-tabs ▪ Download data to use on desktop
Check monthly performance	▪ Multi-user Dashboard reporting ▪ Drill-down: constrained cross-tab tool
Re-use existing data in a different context	▪ Online cross-tab tool ▪ Download data to use on desktop
'What-if' scenario generation	▪ Merge data from different sources ▪ Online cross-tab tool ▪ Download data to use on desktop

Functionality – control vs. access



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Dashboard requirements

BASIC SYSTEM

- ✓ Graphic display with multiple objects on 1st page
- ✓ Drill-down to simple tabs
- ✓ Exception reporting and automated commentary
- ✓ Color coding of data trends
- ✓ Time trends
- ✓ Rolled and unrolled data
- ✓ Back-office control of users and data permissions

ADVANCED SYSTEM

- ✓ Possibly drill-down to individual cases (e.g. for mystery shopping)
- ✓ Drill-down to verbatims
- ✓ Export to Microsoft Excel
- ✓ Select and compare
- ✓ Alerts by email
- ✓ Automated custom alerts by email

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Enterprise online cross-tabs

BASIC USERS

- ✓ Easy organization and selection of variables
- ✓ Easy to apply questions and filters to tables
- ✓ Automatic presentation of appropriate stats (percentages, means etc)
- ✓ Time trends
- ✓ Export to Microsoft Excel
- ✓ Keep it *very simple*
- ✓ Back-office control of users' data permissions

ADVANCED USERS

- ✓ Create new variables
- ✓ Define and apply weighting
- ✓ Redefine time periods and rolled data
- ✓ Significance testing
- ✓ Drill-down to verbatims
- ✓ Drill-down to case level
- ✓ Hierarchical data support
- ✓ Selective exports
- ✓ Back-office control of functionality by user

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Ideally… many users, one system

- The levels of access and control are determined by you when you set user permissions

BASIC USERS	ADVANCED USERS
☑ Easy organization and selection of variables	☑ Create new variables
☑ Easy to apply questions and filters to tables	☑ Define and apply weighting
☑ Automatic presentation of appropriate stats (percentages, means etc)	☐ Redefine time periods and rolled data
☑ Time trends	☐ Significance testing
☑ Export to Microsoft Excel	☐ Drill-down to verbatims
	☑ Drill-down to case level
	☑ Hierarchical data support
	☐ Selective exports

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4. Working with personas

Stages of the implementation process

- Get functional and user requirements
- Develop personas
- Prototype the system with users
- Develop or configure the system
- Trial the system with users
- Train and Implement

Modeling the system

- Interview a cross section of users to learn what they do
- Model the **kinds of usage** and level of control required
- Identify common **usage types**
- Develop ***personas*** to represent each usage type
- Create a fully developed **biography** to fit each *persona*
- Create **usage scenarios** for each *persona*

Persona 1: Senior manager (user type 4)

Name Christine Lake

Age 47

Role
Brand Category Manager

Access required
Dashboard reporting: all regions
Cross-tab tool: non-expert

Biography Christine has a MSc in food technology, and has largely worked in new product development at Ambient Foods. Since 2004, Chris is responsible for the development of a portfolio of 16 lines in the company's Nature's Harvest range of healthier lifestyle food products. She has recently assumed responsibility for developing the division's consumer research panel.

Reporting needs
Monthly brand awareness data
Access to latest ad hoc reports for simple queries

Persona 7: expert user (user type 1)

Name Dr. Colin Adamson

Age 28

Role
New Product Development Manager

Access required
Dashboard reporting: all regions
Cross-tab tool: expert

Biography
Colin has a degree in statistics and a PhD in operational research and risk management. He was appointed head of NPD when the department was created in 2007 to provide central co-ordination of all the company's customer research programmes, which had previously operated at a departmental level.

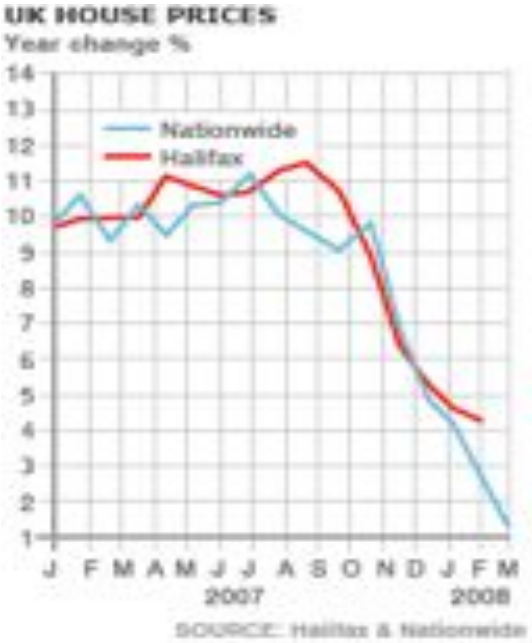
Reporting needs
Monthly brand awareness data
Access to latest ad hoc reports for advanced analysis
Export data to add to Hyperion system

Personas

- Aim for 5-8 personas in total
- Not real people, but realistic people
- Try to create one persona to represent each major type of user
  - more than one if the user group is very diverse
- You can sometimes incorporate aspects of more than one user type in one persona
- Also vary personas by age, experience, seniority, technological abilities etc.

Using the *personas* and *usage scenarios*

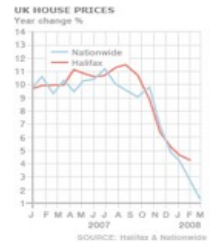
- Use the *personas* to validate the usability of the system and the interface
  - Check naming, terminology and jargon
  - Check skill levels required
- Use the *usage scenarios* to test the system
  - Consider how each *persona* will deal faults or other difficulties
- Use both to drive the training development
- Use both to introduce the system to real users



Conclusions

Conclusions

- Pick the right approach for the data and its use
  - do not assume that everyone has the same need
  - or the same level of ease with data
- Think responsibly
  - consider the users' comfort zones
  - agree **acceptable usage policies** and **SLAs**
- Choose the right tools
  - understand what functionality is available
- Give your users a voice
  - identify the **needs** by talking to users
  - identify **types of users**
  - use ***personas*** *and* ***scenarios*** to prototype the system, to test the interface and drive the training



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