How Not to Build a Faster Horse

Using surveys to increase customer satisfaction and improve ROI.

BY KEVIN IREDELL

It's been said that before Henry Ford invented the Model T, his potential customers told him they wanted faster horses. Whether that's a true story or not, it highlights the predicament many of us find ourselves facing every day. How do we turn what our users tell us they want into something they didn't even know they needed?

The answer is a well-constructed user survey. There are three components of a survey (usage, satisfaction, and analysis of findings) that are key to understanding why we spend money and resources on particular products and how we can analyze data from user surveys to uncover unmet needs and increase the value we bring as information experts.

Begin with a Hypothesis

It is important to start with a hypothesis. Why are we doing this survey? What question do we need answered? A hypothesis will allow you to focus the questions and give you concrete and actionable answers by trying to prove or disprove the hypothesis. An example is the vendor who shows usage increasing year after year, but the lawyers at the firm keep complaining about the service. A hypothesis could be framed around why they feel usage is increasing. "Usage is increasing because we've taken on a new practice group," "Usage is increasing because we have new lawyers who are unfamiliar with this product," "Usage is increasing because the newly redesigned site is too hard to use." Each of these examples would yield very different survey questions.

Asking the Right Question

Once you have the hypothesis and begin drafting the questions, besides the obvious guidance to make the questions fair, unbiased and objective, and to ensure the response options are balanced and mutually exclusive, play the responses back in your head as though the survey is complete. A question may seem like it will reveal exactly what you need, but once you hear it in terms of response, you may feel differently. For example,

KEY TAKEAWAYS

1 Start with a hypothesis.

2 Ask questions that support or refute the hypothesis.

3 Stay objective when analyzing the results.

4 Look for secondary research or data to support your findings.

"How often do you access library resources?" (once a day, once a week, once a month). It seems like on the surface this would be an important statistic to know; however, once you start thinking about how this will play out after the survey is completed, you might find that it's not that insightful after all. For example, 20 percent of lawyers access once a day, 50 percent once a week, 30 percent once a month. The percentages don't matter here; you can switch them around, and you'd still come up with more questions than answers. Why do they access that frequently/infrequently? Do they require assistance or is their interaction all self-serve? Would they benefit from more access or less? Going back to your original hypothesis, ask yourself: Does the answer help prove or disprove it?

The usage part of the survey should aim to uncover behavior. Usage could be further broken down to consider: What resources are being used? How often are they being accessed? How long does it take to access them and find the answer the user is searching? While most online resources will provide some data and statistics, they will generally only reveal a high-level summary of how the product is currently being accessed. It's a fine place to start, but when negotiating renewal fees, those data are not enough. *X* number of lawyers logged in, *X* number of hours were spent on this service, etc. A statistic from a usage survey that augments these data, such as *Y* percent of lawyers who accessed the service felt it took too long or longer than it should have because of confusing design, would be much more insightful pieces of information.

The second piece of behavior or usage should uncover what the lawyers are doing with the data. Questions that uncover if the time they are spending on researching or reviewing researched materials is billable will yield valuable information that can help build internal metrics for return on investment (ROI). Average time spent plus average time billed multiplied by a blended hourly rate would be one place to start. Another might be library staff time as compared to equivalent time spent by a lawyer—the data in potential billable hours—and the cost of a researcher doing the work can be quantified as well.

USER SURVEY CHECKLIST

- ☐ Develop a hypothesis.
- ☐ Identify the audience for the final results.
- ☐ Gather secondary/internal data that will help augment and support survey data.
- ☐ Develop the questionnaire making sure questions are neutral and unbiased, and aim to prove or disprove the hypothesis.
- ☐ Identify and gather the invitation list for participation.
- ☐ Determine timing.
- ☐ Decide on whether to offer an incentive.

SURVEY COMPONENT CHECKLIST

- ☐ Survey hypothesis
- ☐ Survey timeline
- ☐ Survey instrument
- ☐ Survey communications (announcement, invitations, reminders)
- ☐ Survey results (PowerPoint, Word, etc.)
- ☐ Post-results communications (final results to attendees, incentive distribution)
- ☐ Post-results action plan

Finally, when analyzing and reporting on the results, it's important to keep in mind who your audience is. It is essential that your summary of key findings clearly restates the hypothesis and shows how the results either proved or disproved your original theory. Focusing the reader on why the survey was done will eliminate second-guessing and misinterpretation of the intention of the survey. Including the internal metrics in the key findings as well as how the survey results support those findings is essential to building a true picture of ROI.

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