# Demystifying User Research



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# 01. Every interaction is a lesson

A VP of Sales, a service desk agent and an apology

# What do you think of today’s presentation?

# Why we survey

Surveys are the easiest way to get feedback from our users.

1. Measure Agent performance
2. To better understand users
3. Gauge process quality
4. Specific Metric
    1. CSAT – Customer Satisfaction
    2. CES – Customer Effort Score
    3. NPS – Net Promoter Score
5. Get new ideas

# First, check your intent

### Who does it benefit?

Is this survey for the people you serve, or a barometer for leadership? Be honest about your intent.

If only IT benefits, rethink it.

### Can you act on it?

If none of your decisions changes based on the results, you're collecting data points, not insight.

No action, no survey.

# 02. Our beloved metrics

The difficult truth about CSAT, CES and NPS

# Four beloved metrics, four blind spots

### CSAT

Great to measure, if only it were accurate. Asked right after an incident, it mostly measures the incident.

### Net Promoter Score

Fails when users have no other choice, or use a service they could never recommend.

### Customer Effort Score

Asking someone to rate their effort just gave them more effort.

### Overall CX

A fresh idea, combines many metrics and inputs into one number.

# NPS math punishes progress and ignores the middle

Score = % promoters minus % detractors, on a scale from -100 to 100

## 0 to 6

Detractors. Going from 1 to 6 still fails.

## 7 to 8

Passives. Ignored, though so close.

## 9 to 10

Promoters. Nobody recommends a service desk.

# CX Overall

### Quality

Subjective. Quality according to whom?

### Speed

Fair. Users can feel this one.

### Technical Knowledge

If they could judge it, why did they call?

### Approachability

They called you. That was the approach.

### Communication

Rarely noticed, and also subjective.

### Five questions

Way too much to ask after one interaction.

# Unreliable narrators

### Forecasting

Humans are bad at predicting how they'll feel. Asking what they'll want next is unreliable.

### In the moment

How someone feels right now filters how they rate the whole service.

### False positives

A happy click can hide a broken process people have simply learned to tolerate.

### False negatives

Unfamiliar rating screens get misread. Follow Jakob's Law and use patterns people know.

Your colleagues aren't **wrong**, but their answers are shaped by timing, emotion and the interface. Treat every response as a clue to investigate, not a verdict.

# 03. When to ask

Timing changes the story you hear

“

People don’t care how much you know until they know how much you care.”

**Margaret Tyson**
**(popularized by John Maxwell)**

# Same outage, three stories

People tell a different story depending on how long ago it happened. What stays consistent is what you want to learn.

Example: your home internet goes down on a workday.

+0

Day of

I couldn’t work from home. Did they fix it or not?

+7

A week later

Did they wear shoes in my house? Did they pet my dog?

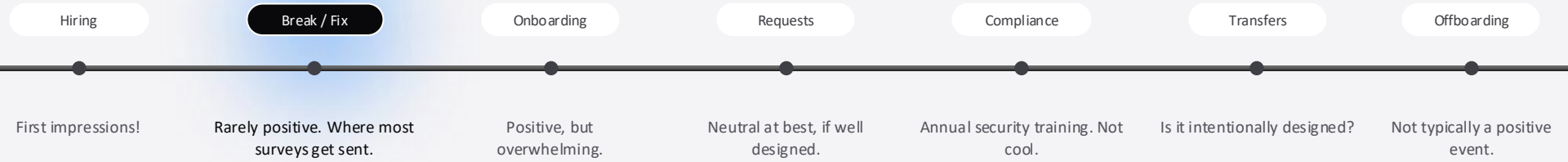
+30

A month later

How they treated me, and whether it stayed fixed.

# Every touchpoint starts with a mood

If you only survey after incidents, expect negative responses. Incidents are negative experiences to begin with.





## Test it

**Tweak the timing**
A/B test when and how often you ask. Validate accuracy before you trust it.

**Offer opt-in**
Let people choose to give feedback, including from self-service.



## Map it

**Walk the journey**
Map an incident or request journey to find the touchpoints worth asking about.

**Find the moments**
Ask where feelings run high, not just where tickets close.



## Open the door

**Keep it open**
Open-door feedback and real conversations hold great value.

**Ask annually**
A yearly survey, separate from tickets, shows the bigger picture.

# 04. Beyond the survey

Surveys are the most rudimentary form of user research

# Six methods to try

### Ticket & behavior data

Repeat contacts, reopens and channel hopping show pain without asking.

### Follow-up calls

Call the people who clicked sad. One call beats a hundred scores.

### Shadowing

Watch real work happen. People skip steps they’d never mention.

### Journey mapping

Map touchpoints, gaps and emotions across a whole service.

### Usability testing

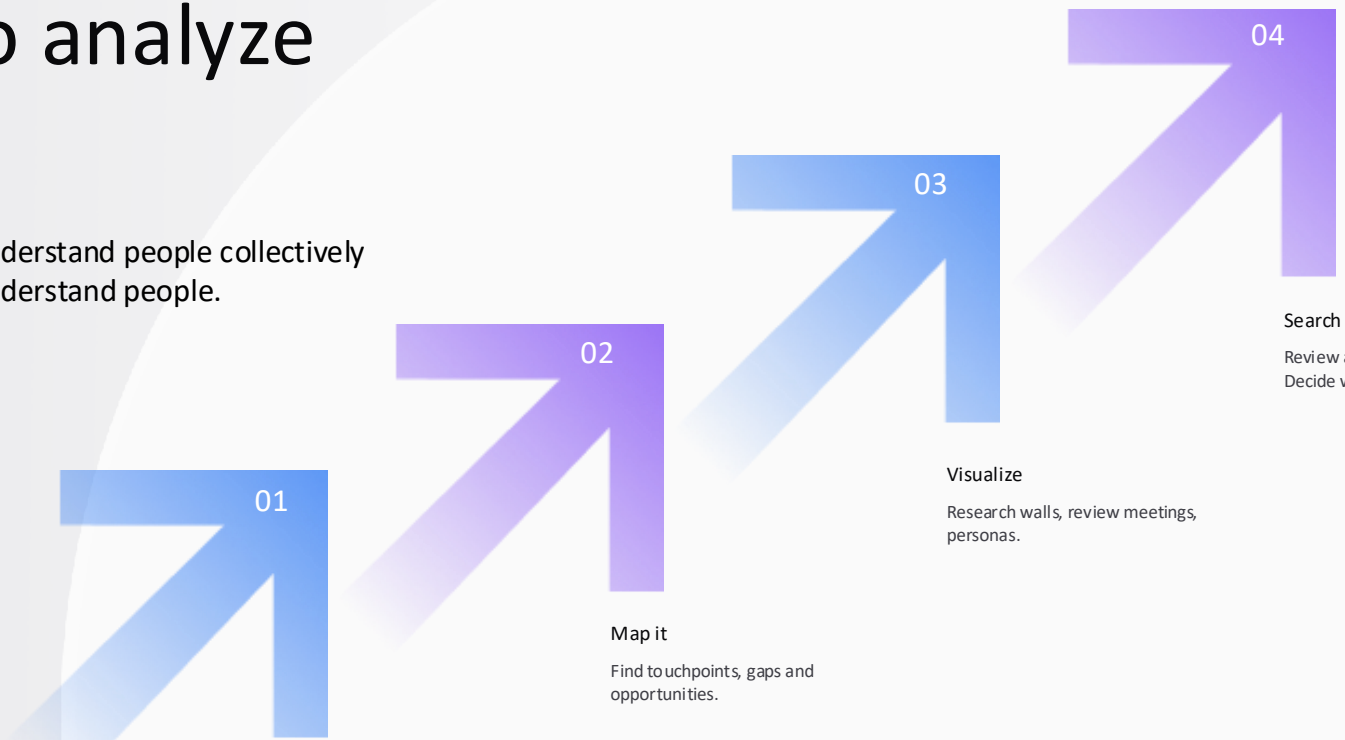
Test the portal or form before launch, not after the complaints.

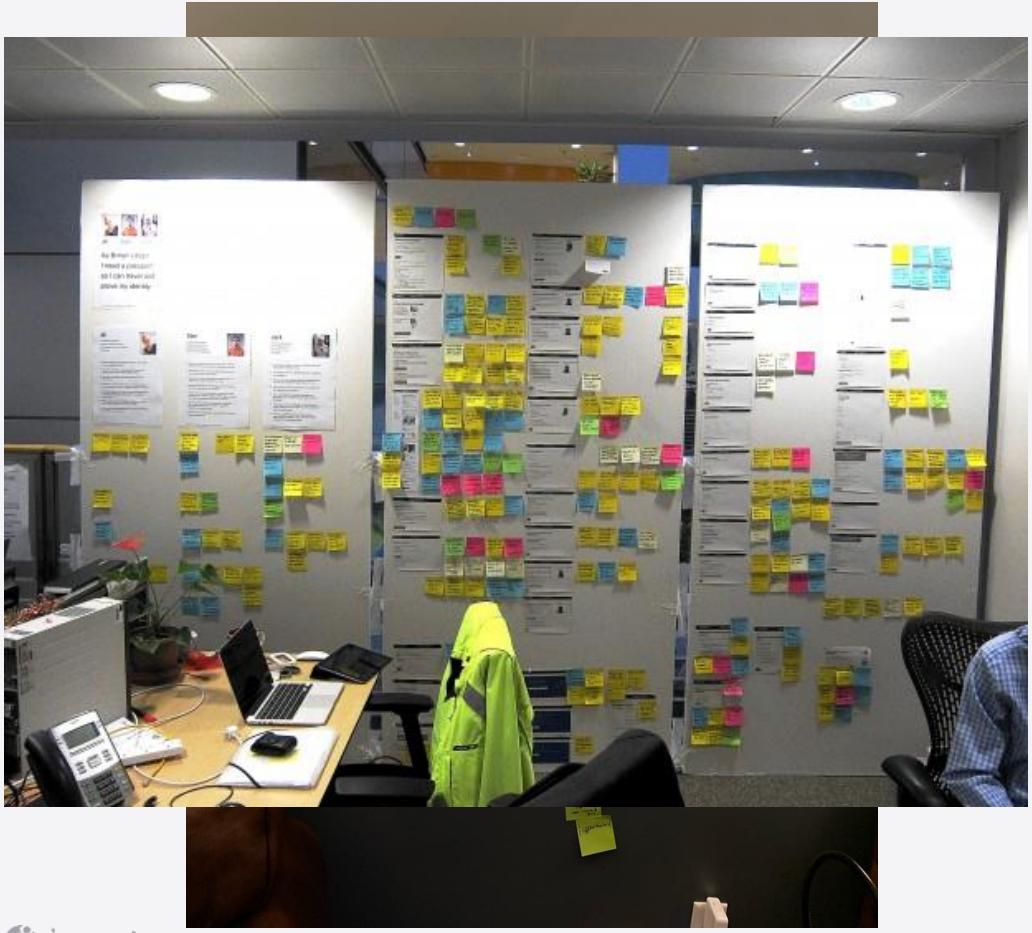
### Focus groups

Talk with users who aren’t fresh off a frustrating ticket.

# How to analyze

The best way to understand people collectively is to collectively understand people.

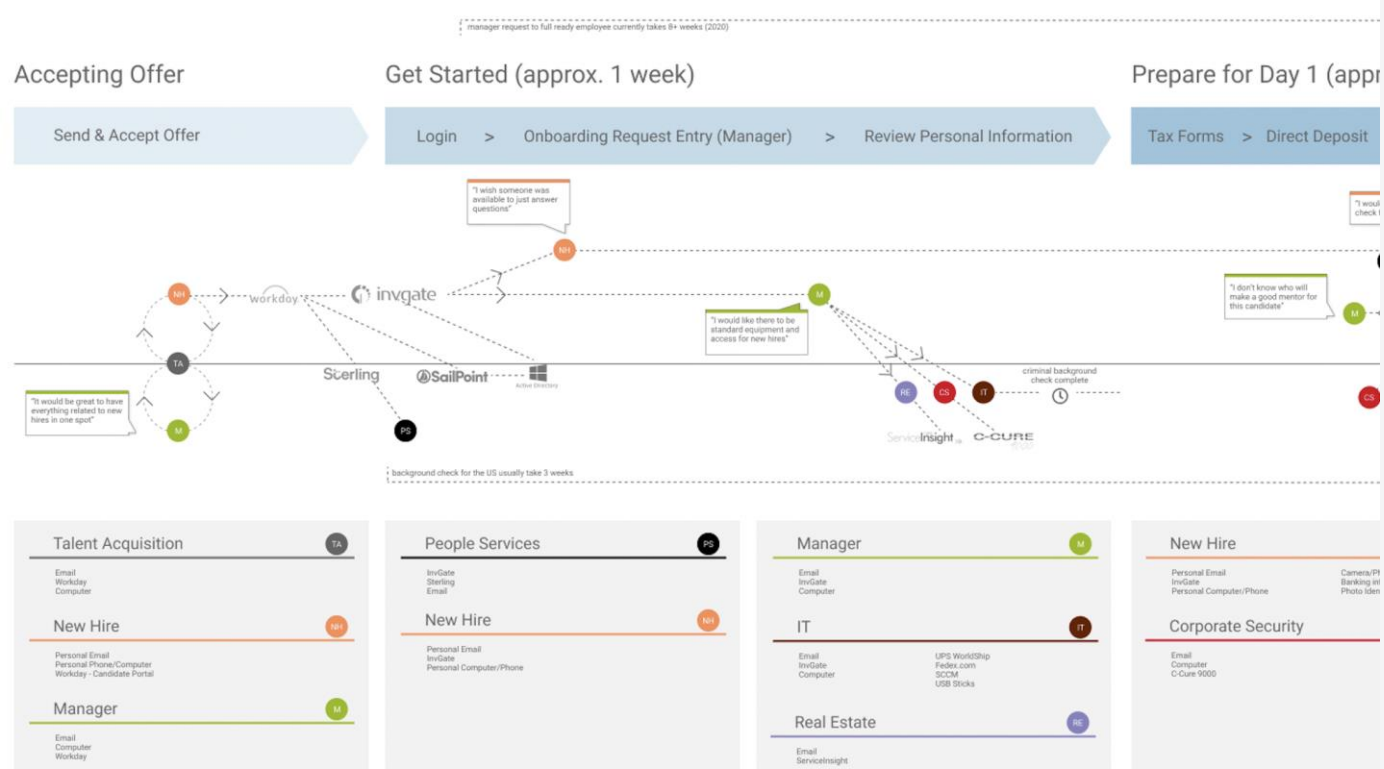




# A real research wall

Every sticky note is a quote, a ticket or an observation. The team clusters them until patterns appear.
This is what “collectively understand people” looks like in practice.

# Mapping the onboarding journey



# 05. How to ask

Streamline first, then you can take action

# What to send

The details of the survey interaction decide your response rate. Anything more than one click and you lose half your audience.

**Not a survey**
**simplify to the max**

Remove email and extra systems wherever possible. Meet people where they already are.

**1 click**
**low friction**

Make a response as easy as one click and you greatly increase the odds of hearing back.

**Happy / Sad**
**just the facts**

A rating plus an optional text box is enough to act on and to analyze for insight.

**Value**
**what they care about**

If your users don't value it, you have no reason to ask and they have no reason to answer.

# The incident survey, streamlined

### Did we fix the problem?

One question, one click: happy or sad. Works on mobile and in email.

### What else should we know?

Optional plain text. This is where the insight lives.

### Follow up on sad and neutral

Ask what would have made it better. Personally, not with another survey.

### Treat it as a canary

Surveys flag interactions for follow-up. They’re not meant to explain everything.

# Four radical ideas to improve your surveys

### Start with context

Use what you already know about the service. Be human and skip the obvious questions.

### Analyze as a group

Share results in workshops and daily work so understanding spreads.

### Focus on impact

Only send a survey if the results will inform change, then act on them.

### Understand the journey

Surveys, feedback and tickets are one experience. Protect it, it shapes your scores.

# What’s in it for me? Show them the last survey’s impact.

# Takeaways

0 stars can be the best survey response you'll ever get, if it starts a conversation.

### When

There's no perfect time. Test, map and try lots of things.

### What

Ask little, and remember people are biased creatures.

### Why

Know the decision a survey informs before you send it.

# Why we survey

A survey should travel the full path. If it stops at the first step, it’s a report card, not research.

### Measure & Report

Capture a signal you can track over time

### Analyze & Understand

Find the story behind the score

### Learn & Change

Turn what you heard into a better service

# Thank you

Let’s keep the conversation going!



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