

# How to improve the inevitable survey

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#SDinGOV2021



# How to improve the inevitable survey

Improve a survey by:

- Working through 7 steps using my Survey Octopus
- Thinking about goals and numbers
- Testing your questions and your questionnaire
- Giving enough time to fieldwork, responses, and reports

The survey is a  
systematic method  
for gathering information from  
(a sample of) entities  
for the purpose of  
constructing quantitative descriptors  
of the attributes of the larger population  
of which the entities are members.

Groves, Robert M.; Fowler, Floyd J.; Couper, Mick P.; Lepkowski, James M.; Singer, Eleanor & Tourangeau, Roger (2004). *Survey methodology*. Hoboken, NJ: John Wiley & Sons.

# I change the definition a bit

systematic method	becomes	process
gathering information	becomes	ask questions
entities	become	people
quantitative descriptors	become	numbers
attributes of the larger population	becomes	make decisions

The survey is a process  
for getting answers to questions  
from (a sample of) people  
for the purpose of  
getting numbers  
that you can use to  
make decisions

To make decisions

People

The survey is a  
process for getting  
answers to questions

getting numbers

The aim of a survey is to get  
the number that helps you to make a decision

Why you want ask

Who you want to ask

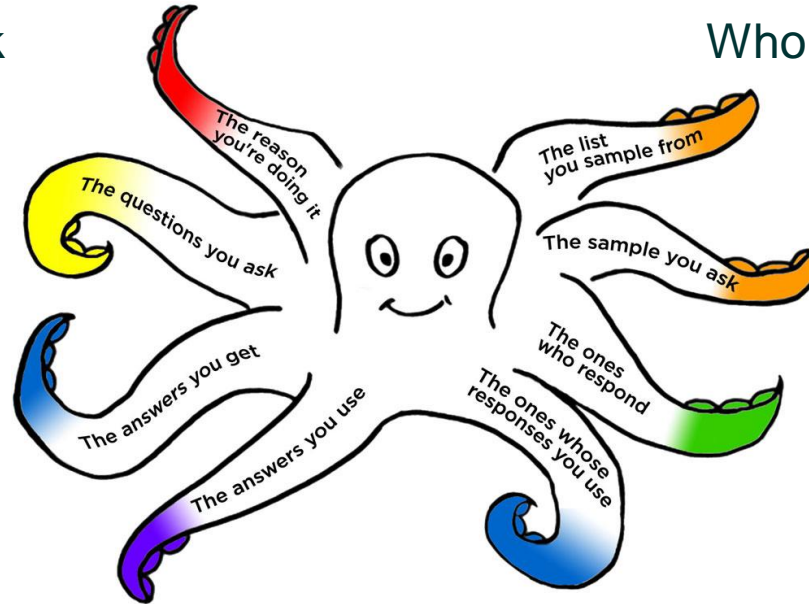
# The Survey

The number

# The Survey Octopus has things to think about

Why you want ask

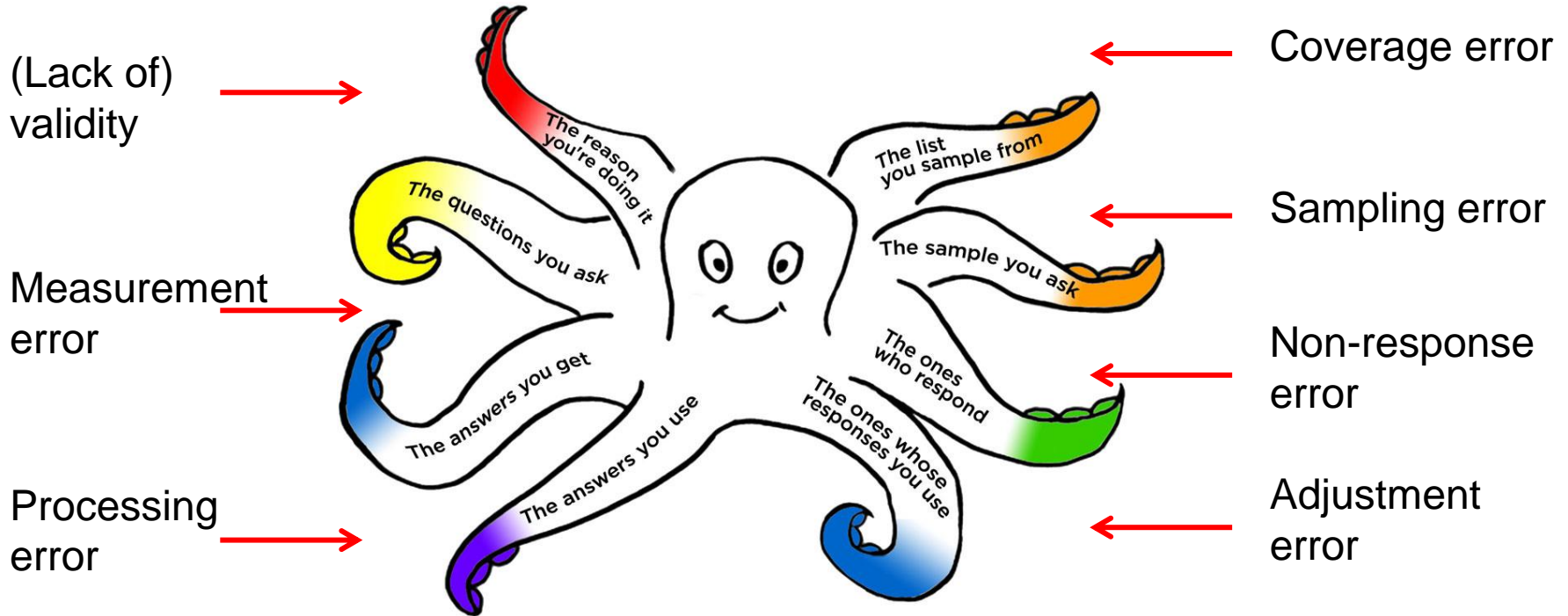
Who you want to ask



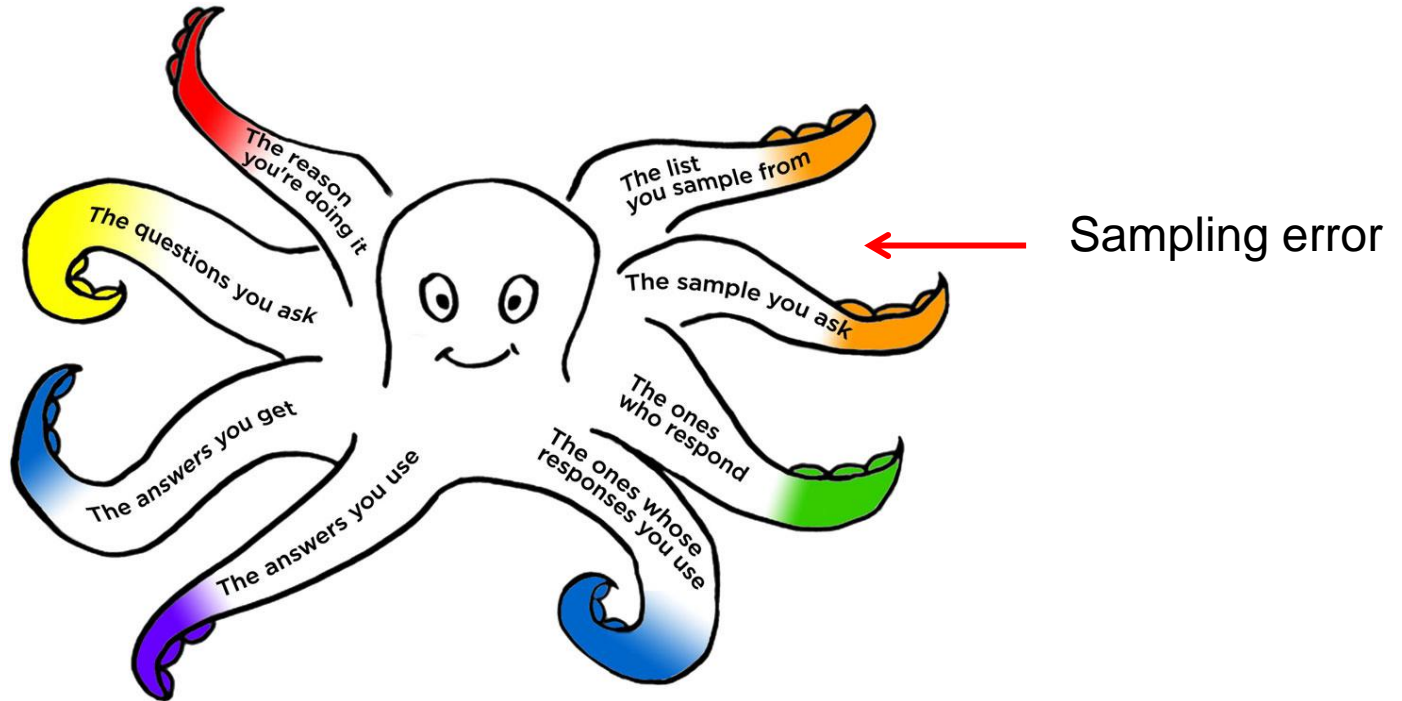
The number



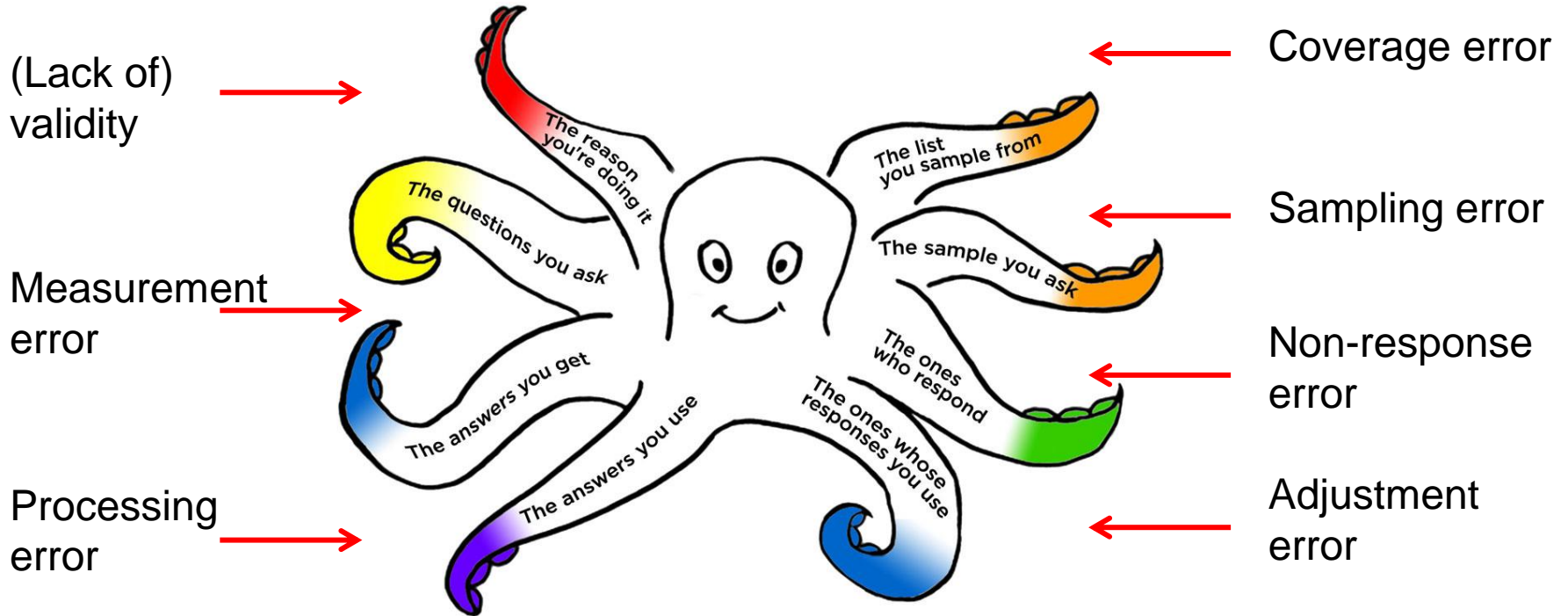
# There are errors all around the Survey Octopus



# Sampling error is related to statistical significance



# Significance in practice relates to Total Survey Error



# Takeaway

Statistical significance is completely different from significance in practice

# There are steps in the process for each area

Goals

Questions

Questionnaire

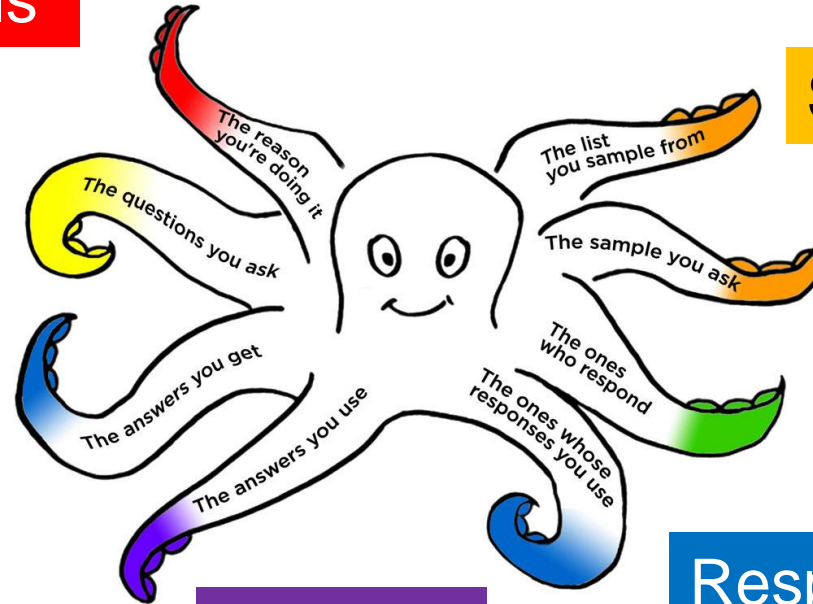
Response

Reports

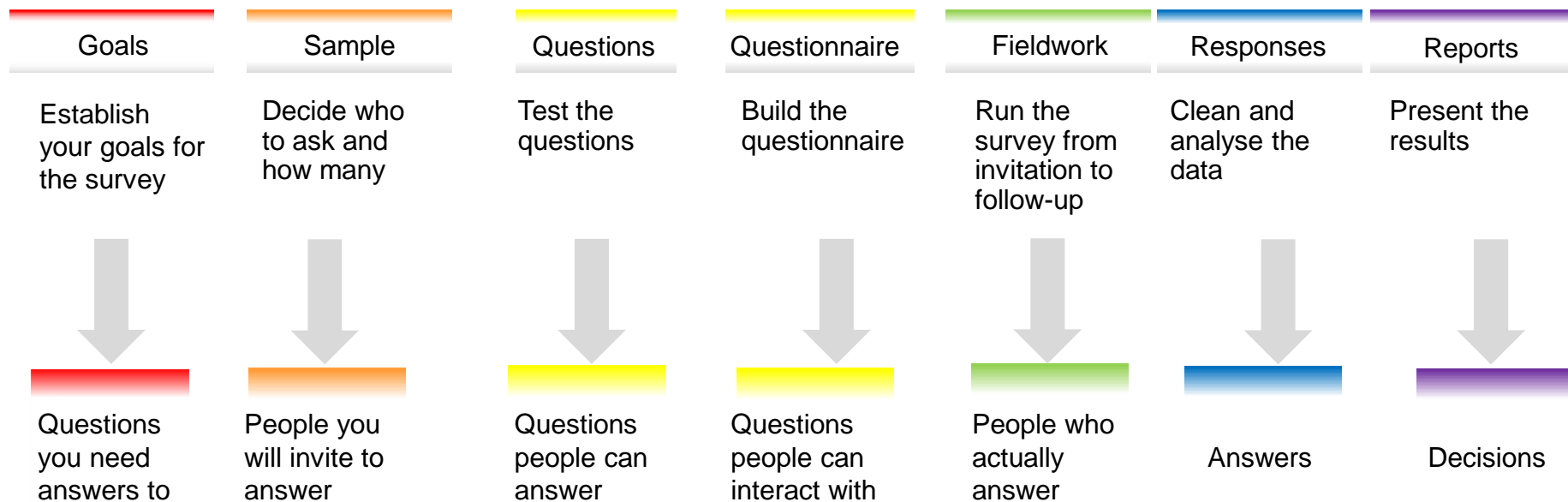
Sample

Fieldwork

Response



# Here are the 7 steps as a linear process



# I have to know about goals first

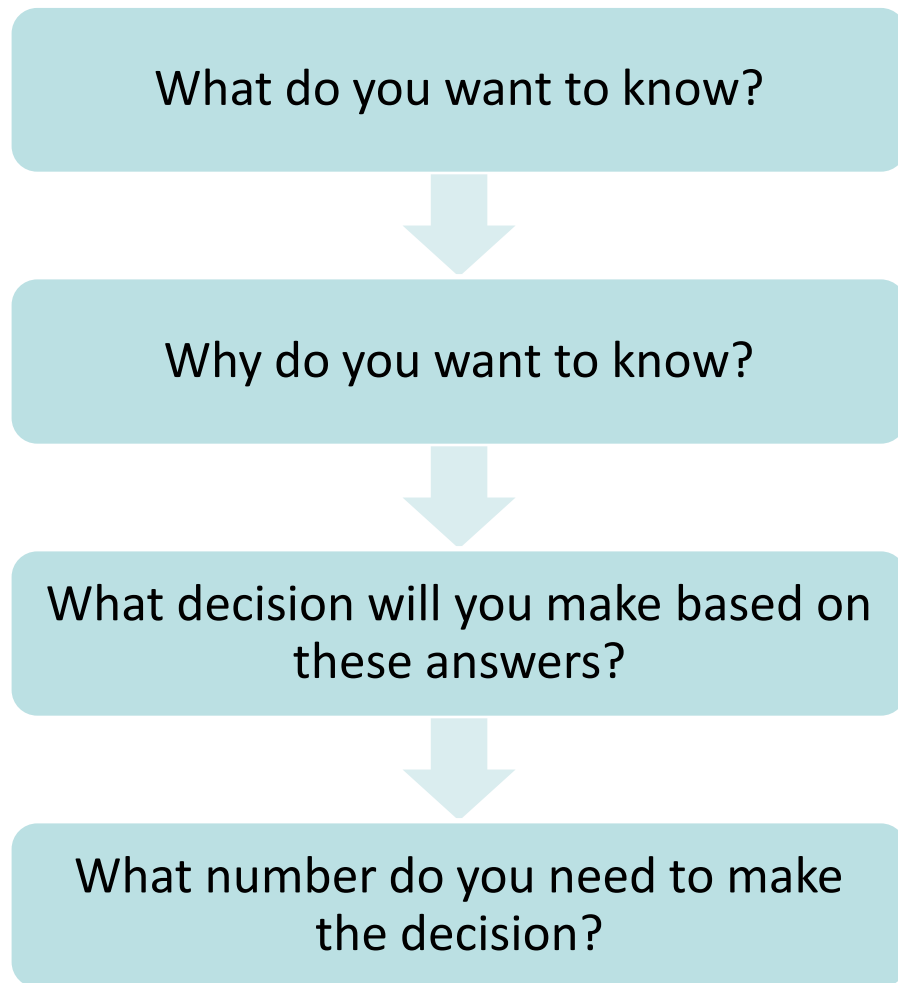
Goals

Establish  
your goals for  
the survey



Questions  
you need  
answers to

# Establish your goals for your survey





# Let's try it

“We want to know what users think about our new funding application process”

# I'll get you to join my Miro board soon

"We want to know what users think about our new funding application process"

Why do you want to know?

What decision will you make based on these answers?

What number do you need to make the decision?

Write an idea  
about why  
you might  
want to know

“We want to know what users think about our new funding application process”



Why do you want to know?

# Write an idea for a possible decision

“We want to know what users think about our new funding application process”



Why do you want to know?

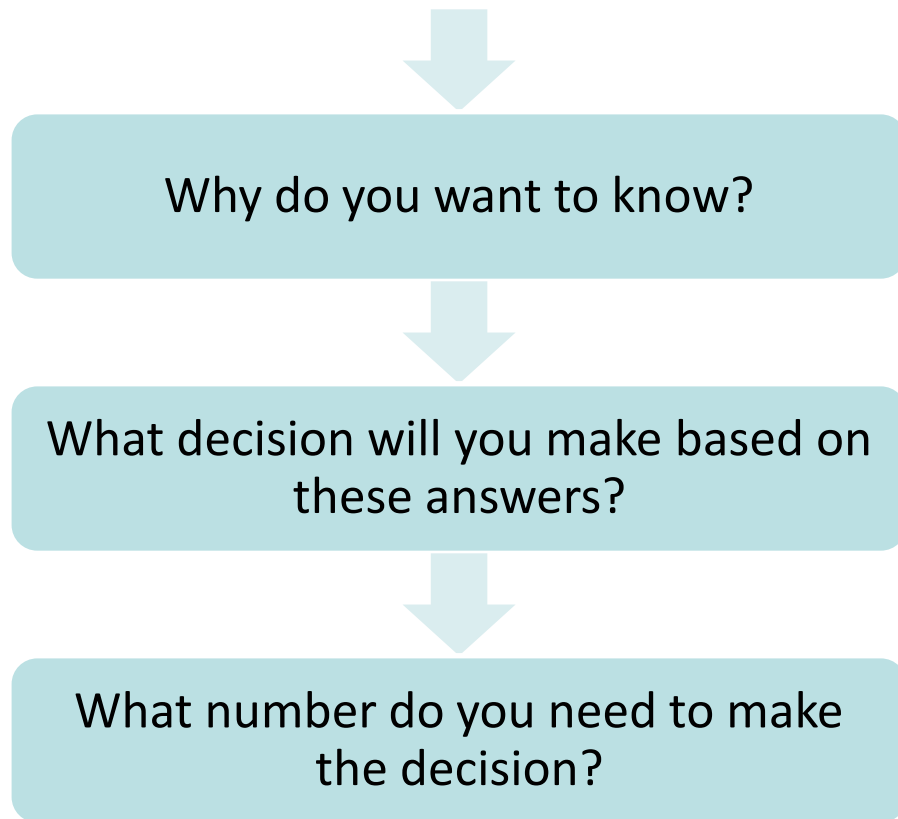


What decision will you make based on these answers?

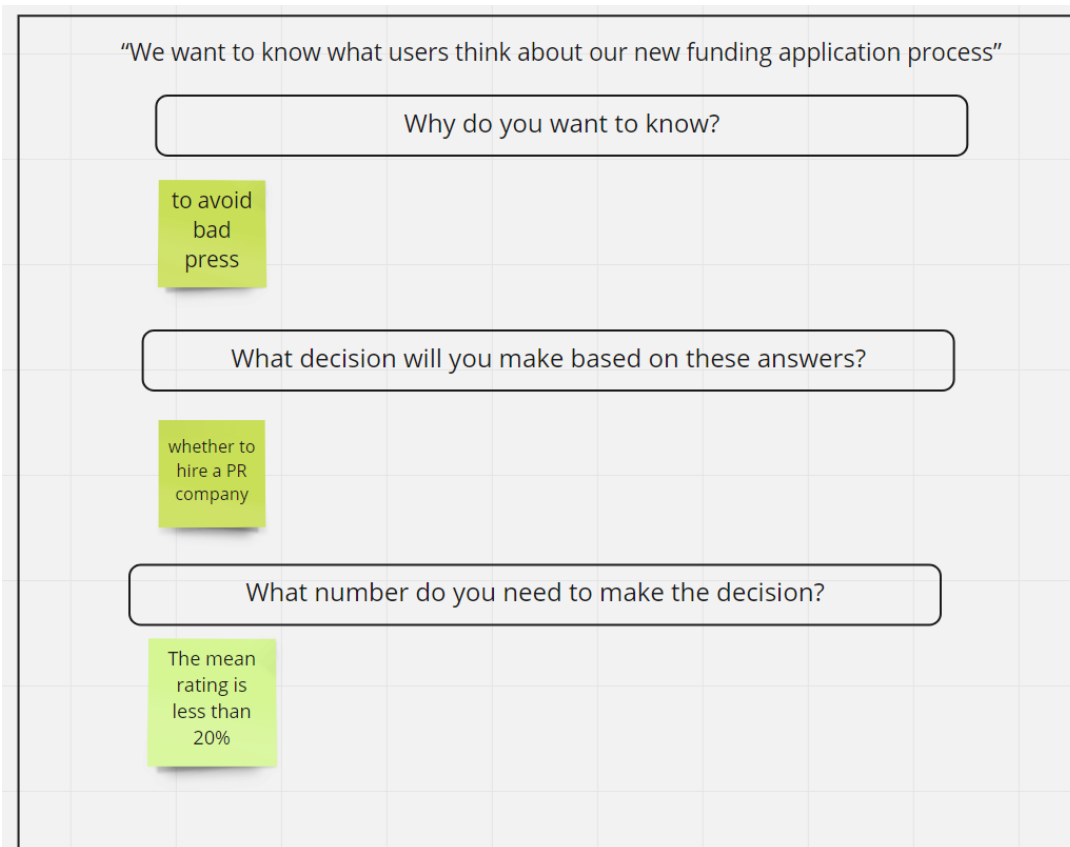
# Write an idea for a number

- “?” is ok!
- But do try

“We want to know what users think about our new funding application process”



# Here's an example.



# Into groups

Visit the Miro board

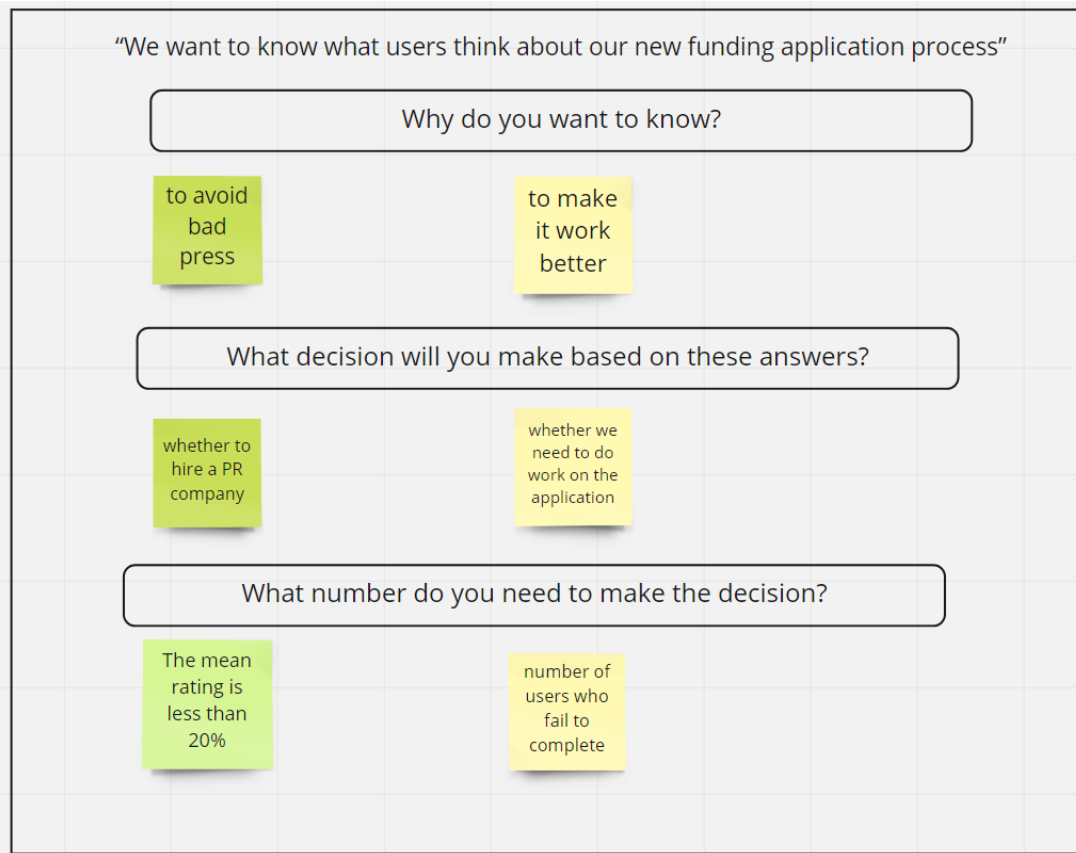
Join the breakout room

Find the board area for your  
breakout room

Add your sticky notes

Discuss in the room

# Sometimes the result is a complete change of ideas



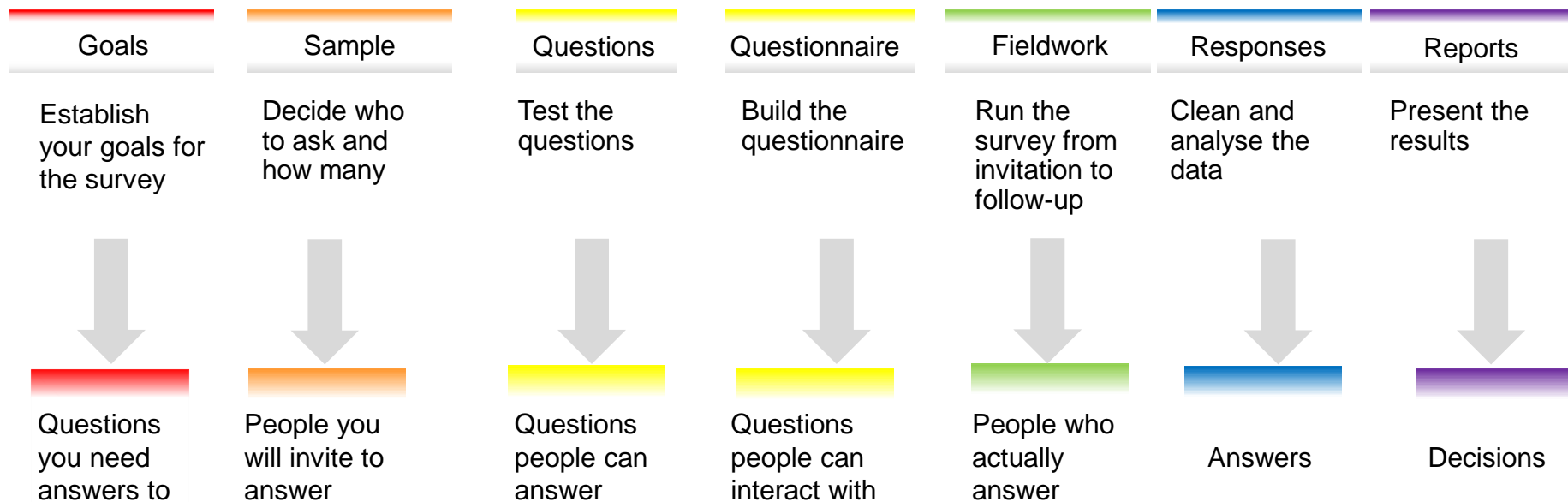


# Takeaway

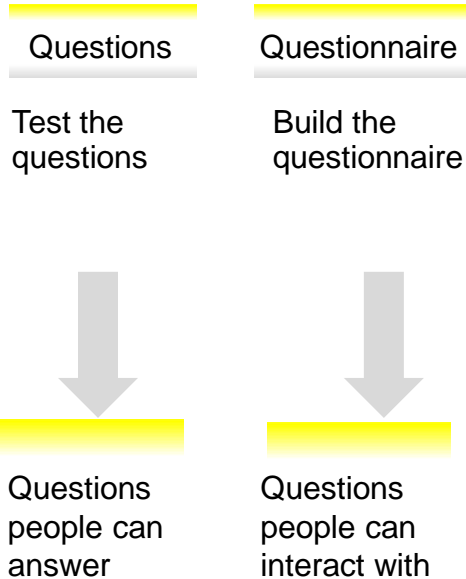
Think carefully about whether you need a quantitative method

# Testing your questions and questionnaire

# Recap: the 7 steps as a linear process

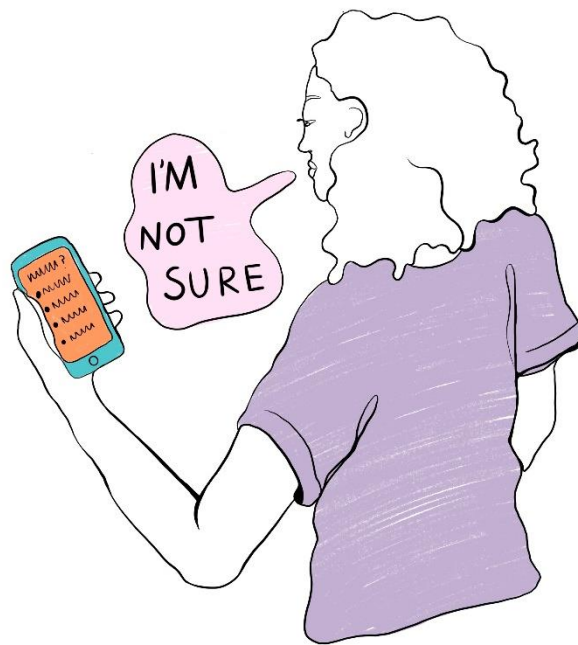


# We're looking at questions and questionnaires



# Do usability testing on your questionnaire

Get someone to answer  
your questionnaire while  
you watch

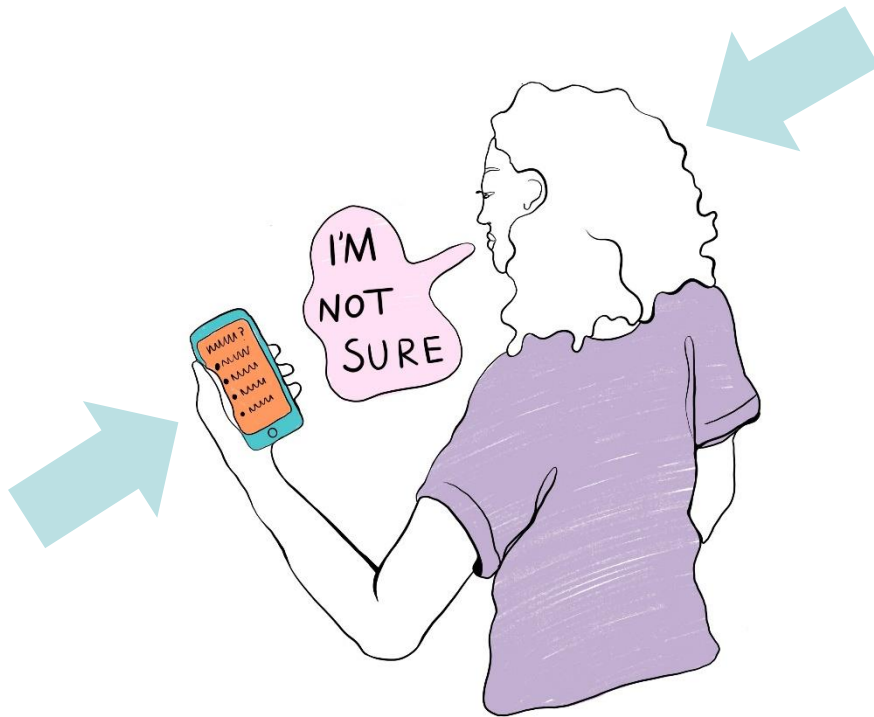


# Do cognitive testing on your questions

Where did 'I'm not sure'  
come from?

Was it an interaction  
problem?

What is this person  
thinking?



# Exercise

Count the windows in  
the place where you  
normally live

Note your thought  
processes



# Cogability testing is a hybrid method

- Run a usability test in the usual way BUT
- Ask the person to think aloud as they work AND
- Interrupt them with cognitive probes
  - “Tell me about how you thought of that answer”
  - “Did you know that answer straight off or think about it?”
  - “Was that answer from counting or a guess?”

“Cogability testing” coined by Laura Wilson and Emma Dickinson in  
“Respondent Centred Surveys” (available November 2021)



# We can work with stakeholders

## Testing with users

- Usability test
- Cognitive test
- Cogability test

## Review with stakeholders

- Goals to decisions
- Person-led expert review

# A “person-led expert review” is a workshop

Each attendee writes a ‘once upon a time’ story:

- Choose the name of a person
- Say:
  - something about them
  - why they are responding to this questionnaire

(optional: everyone shares the story that they wrote)

# Now try answering the questionnaire

- Go through the questionnaire, answering ONLY from the point of view of that person
  - Keep notes!
- When all the attendees have completed the questionnaire, compare answers



# Let's try it

“We want to know what users think about our new funding application process”

# Exercise:

## Choose your person

Choose the name of a person

Write:

- something about them
- why they are responding to this questionnaire



Person-led

# Exercise:

## Quietly answer this question

### Application Process - Feedback Survey

#### Section 1: About you

Thank you for taking the time to provide feedback on the application process.

Q1 Who submitted your application?

- ☐ I did
- ☐ Family member
- ☐ Paid professional, such as accountant

# Exercise:

## Q2 and Q3

Q2 Who is completing this survey?

- ☐ I did
- ☐ Family member
- ☐ Accountant or adviser

Q3 What motivated you to apply?

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# Exercise:

## Q4

### Section 2: The application process

Q4 How satisfied are you with the application process, on a scale from 0 to 10 where '0' means 'not at all satisfied' and 10 means 'completely satisfied'?

- ☐ 0
- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☐ 5
- ☐ 6
- ☐ 7
- ☐ 8
- ☐ 9
- ☐ 10



# Exercise:

## Q5

Q5 Please use the box below to provide us with your feedback on the application process.

*Max: 500 characters*

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# Exercise:

## Q6

Q6 Were you aware of, and did you make use of, the following:

*Tick all that apply*

	I wasn't aware this was an option	I was aware of this but didn't use it	I was aware of it and made use of it
Content on our website	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Videos on our YouTube channel	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Q&A session	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Customer Contact Centre	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Discussing with a colleague	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
News media	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Talked to an adviser or accountant	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Let's  
compare  
answers

Expert review



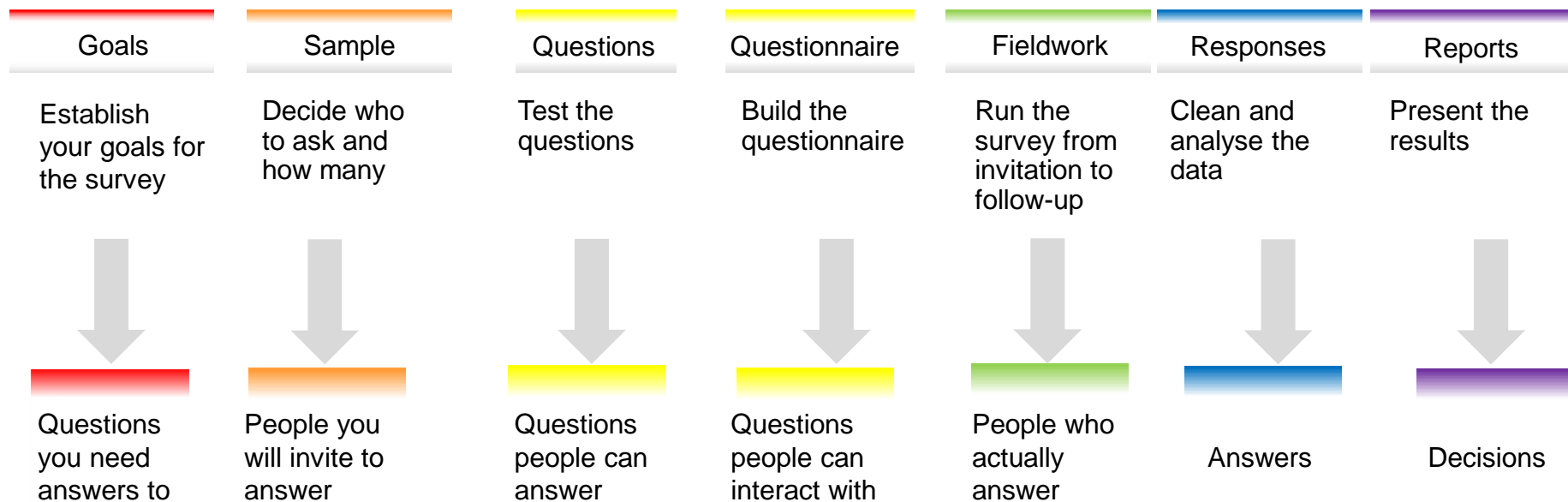
Any of those questions  
problematic for your “person”?  
Please raise your hand!

# Takeaway

Testing the questionnaire with users is the gold standard, but a person-led expert review can also improve an inevitable questionnaire

# Fieldwork through to reports

# The last three steps create the results



# How will you analyse the responses to this?

Q4 How satisfied are you with the application process, on a scale from 0 to 10 where '0' means 'not at all satisfied' and 10 means 'completely satisfied'?

- ☐ 0
- ☐ 1
- ☐ 2
- ☐ 3
- ☐ 4
- ☐ 5
- ☐ 6
- ☐ 7
- ☐ 8
- ☐ 9
- ☐ 10

# There are many methods for an 11pt scale

1. Add the scores numerically
2. “Top Box”
  - Count positive results: 6 through 10
  - Ignore negative or neutral: 0 through 6
3. NPS scoring
  - Detractors: people who answer 0 through 6
  - Ignore people who answer 7 and 8
  - Promoters: people who answer 9 and 10
  - Score is % of promoters - % of detractors



# Takeaway

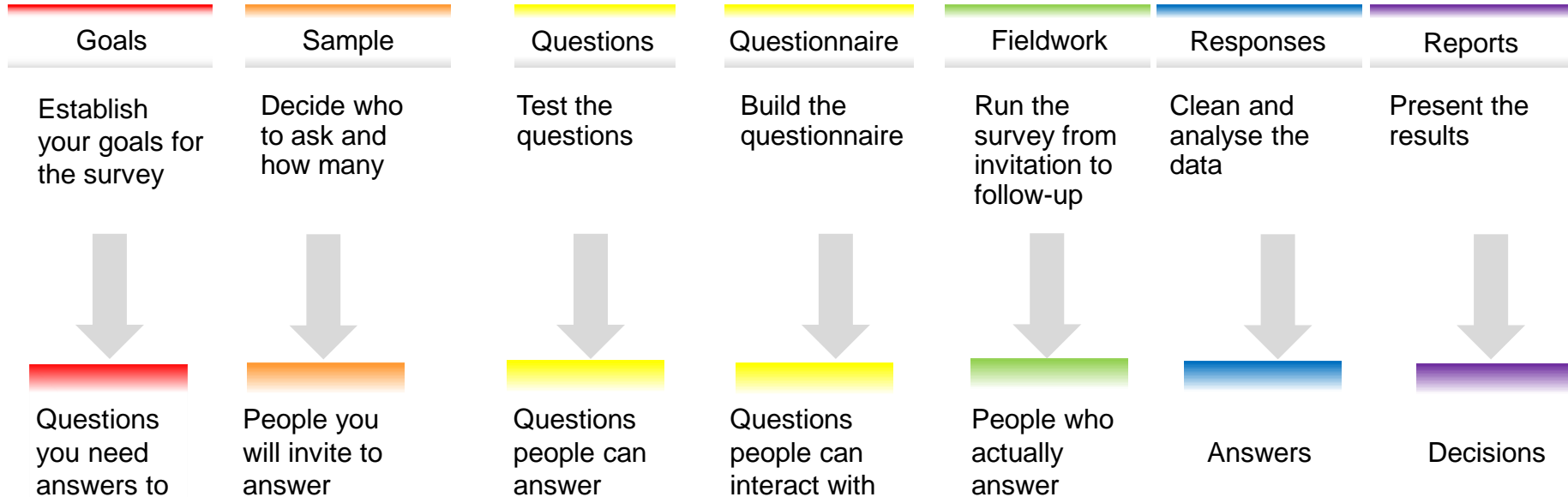
Decide on how you will calculate the number(s) in the result **BEFORE** you collect the data

# Takeaway

Practice by doing a pilot test  
(maybe 100 responses)

The process isn't really linear

# The survey process in 7 steps



# The actual process is a lot more connected

Goals

Questions

Questionnaire

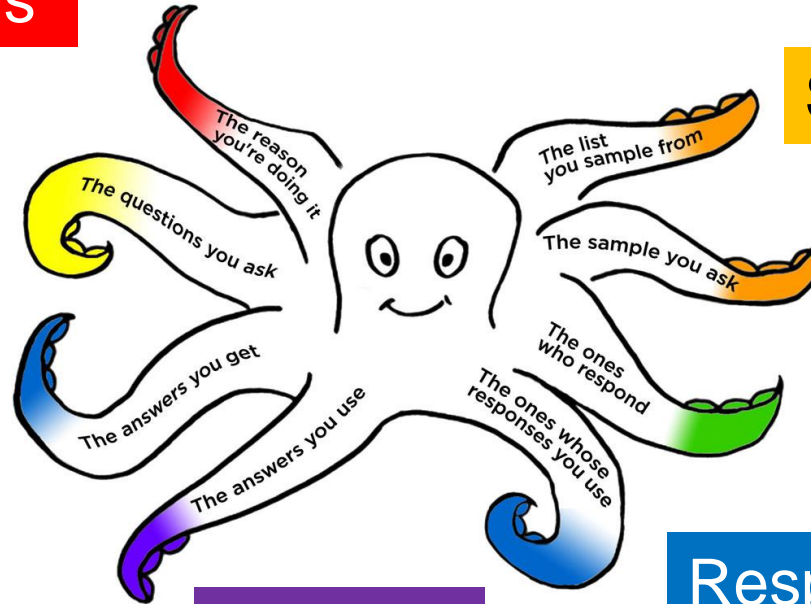
Response

Sample

Fieldwork

Reports

Response



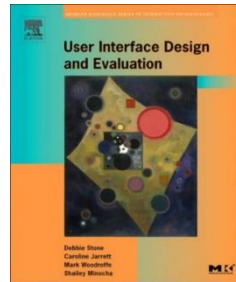
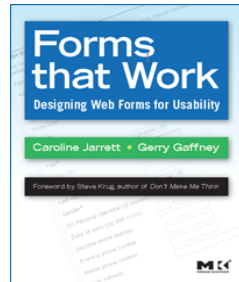
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SDGOVSTW0921



## SURVEYS THAT WORK

A Practical Guide for Designing Better Surveys

by **CAROLINE JARRETT**

Foreword by Steve Krug

 Rosenfeld