# Case Study: Internal surveys

While working at Big Fish Games, I was invited to a meeting that included our product team which included UX Designers (myself and Ash Billings), product managers (Chad Jones and Gina Connelly), and the director of product(Scott Stanton). The PLUM team’s Jennifer Bertelsen requested the meeting to learn about where information is stored for TackleBox. This is relevant when the PLUM team are creating their best practices on their wiki and where they need to link the users to the relevant information for TackleBox.

During the meeting we discussed what documentation is available for TackleBox and where it’s found. This started to identify that our wiki design and layout is much different than how PLUM approached their Confluence.

## The Problem

After the meeting we identified a few areas to be addressed:

* What type of documentation are users looking for
* How do the users navigate Confluence
* Understanding of what the Product Team does

## The Process

First, I needed to identify who I will be talking to about using Confluence for TackleBox needs. Fortunately, there is an email alias that contains all the users.

Do to the amount of users, I decided that a survey would be the best approach. By doing a survey I will have an easier time containing all of the data and assuring that the same question is asked the exact same way.

Next, I created a rough list of questions I wanted to ask. I tried to keep my questions relatable in these common areas:

* User infromation
* What are the users tendencies for using Confluence
* Confluence design preferences
* Current pain points of Confluence
* Product Team information

Once I finished, I ended with a total of 14 questions. To validate the approach I shared my questions with the rest of my team. Through collaboration the questions grew to 18 and many of them were rephrased.

Next was to create a dry-run of the survey. I placed all the questions into Optimal Workshop and sent the surveys out to the entire Product Team.

Most of the feedback was in regard to the ordering of the questions and the type of answers expected for specific questions. Then Scott Stanton grabbed my attention to let me know that he spent a good 35 minutes completing the survey and that’s with him being aware of the content being asked. This made me realize that the amount of questions and the type of questions could ask a user to spend up to an hour of their day on one single survey.

This of course highlighted a problem within the survey itself.

I asked my manager when it was expected to have the results in and the answer was that we just wanted to collect the data first.

After openly discussing the possibilities with Scott, it was concluded that we could run multiple short surveys. This created the Confluence and You! Survey series. I reviewed my existing questions and I grouped the questions contextually by topic and expected answer. Anytime I requested a qualitative answer, I would limit the survey to two questions. For Quantitative questions, I would limit up to 5 questions.

Confluence (wiki) and You

* Part 1 – User Information
* Part 2 – User Preferred Wiki Space
* Part 3 – Confluence navigation approach
* Part 4 – Who is Product Management and Who do you ask for help
* Part 5 – Assess the design of an existing wiki document
* Part 6 – Expecting to find on Mobile Platform
* Part 7 – Topics expected to find on new TackleBox tools/features and user feedback on survey series.

Now that the survey parts are created, I’m ready to start sending these out to the TackleBox users. My first email to the TackleBox team was presented with a friendly greeting and a link to the survey. Within the greeting I let the users know that there will be a total of 7 surveys.

At this point I knew I was taking a risk that I will be spamming the TackleBox users for the next few weeks. While the survey is for a service they use, I felt that it was worth it.

On the second day I resent the same email to the users to try and reach out to the users who may have forgot about the survey. This is of course going through work email and everyone is busy. For the second day email I tried to encourage the users by showing off the completion rate and average time taken for the survey taken.

On the third day I released the second survey. When I emailed the users I would share that Survey 2 is available and thank them for participating in the survey series. At this point I would also share that Survey 1 will be closing soon, at the end of the 4th day to be exact.

At this point I created a cadence for each survey. Day 1 launch, day 2 encourage more users, Day 3 launch next survey, Day 4 prepare to close survey. The cadence kept the emails brief and encouraged active participation.

While taking this approach, it wasn’t all sunshine and rainbows. I did encounter a few participants that did not take the survey serious and professionally. Some users felt that it would have been best to ask all the questions at one time and not waste everyone’s time with multiple emails and multiple surveys. This started to occur at the beginning of week two and progressively became more verbal and sarcastic survey answers as the series went on.

The sour participant may or may have not reached out so some of the higher leadership members to ask about the purpose of the surveys. This resulted in one of the VP’s to reach out to me and ask what all my questions are and the purpose of the surveys. In the end, I had to stay true to my survey and provide all context of the survey. Fortunately for me, I wasn’t asked to end the survey and I was allowed to finish what I started.

## Results

Fast forward to the final survey and I’ve compiled all my survey results. At this point it was time to take what I’ve learned from the surveys and create a comprehensive document to explain it all. My first approach is to download all the survey results from Optimal Workshop and apply it to an excel sheet. This would allow me to have all the information in one place with one design.

Once I shared this with my manager, while the information was great to have, it was still tough to digest. It was mentioned that I should compile the information into an easy to read PowerPoint.

So that’s what I did, I distilled all the raw data and presented them in a PowerPoint slide show. I used tables to show all the user mentions, bar graphs to represent requested features, and pie graphs to show percentages.

## Conclusion

In conclusion, I took my findings PowerPoint and shared it with the entire TackleBox users alias. As of right now, the next action steps are sitting on a Product Managers plate because the information collected in the wiki, while informative on user tendencies and requests, does make any transformation for the existing wiki very dramatic and difficult to execute. What the survey does show is that there are multiple types of users, using the TackleBox tool and documentation. The difficult part is how we approach documentation for development side and then the customer facing side.

Conducting a survey series was new to me because I’ve never seen an approach taken. While it would have been beneficial to conduct user interviews, it would have taken much longer to interview all of the TackleBox users or at least 25 (5 from each team background).