

# How to Use Microsurveys to Drive Product Success

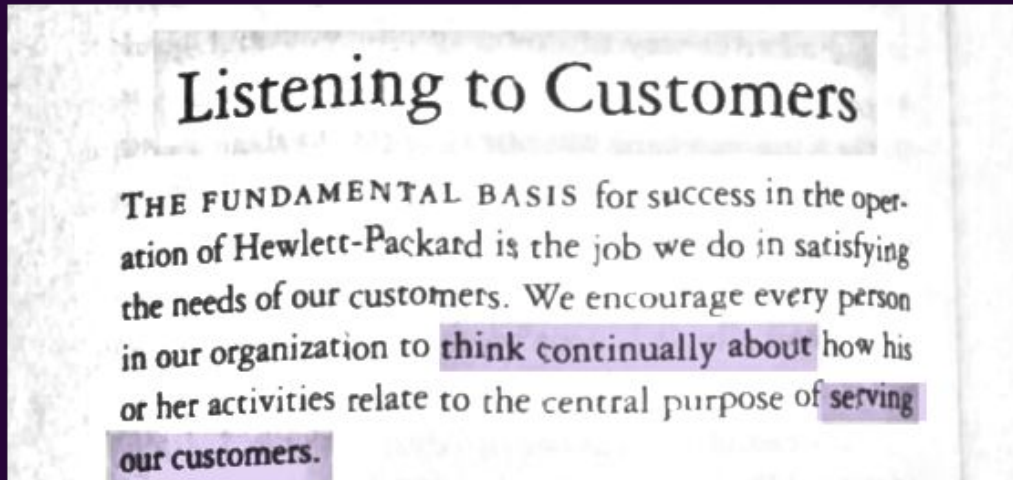
Expert webinar

July 9, 2020

# Our agenda for today

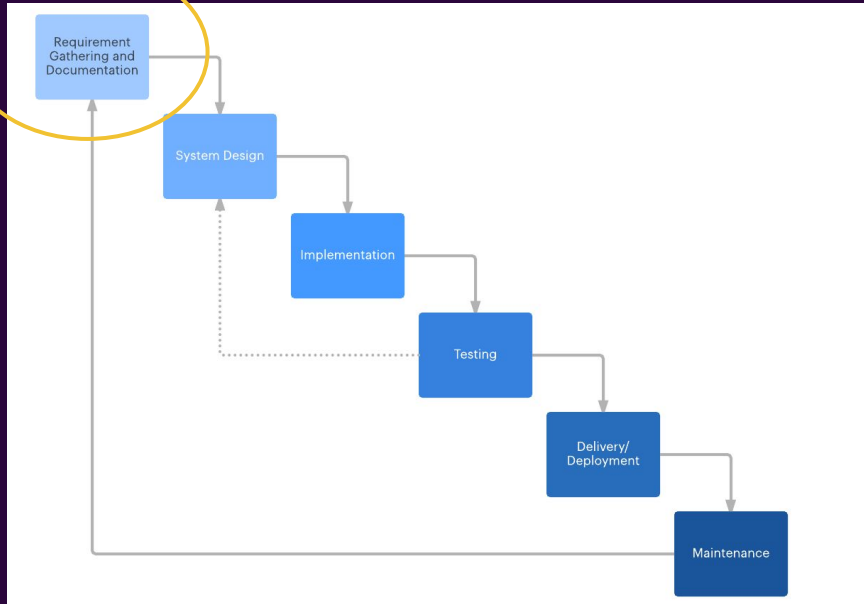
1. Why are surveys boring?
2. User feedback in the product-first age
3. Examples and best practices
4. Q&A

# User research has been part of product management since the role was created



In 1957: 'HP Way' policy mandates PMs to represent voice of the customer

# As the product discipline evolved, user research became a core stage in product development



Most important step in the traditional waterfall development method was the first: *requirement gathering and documentation*

# However... as agile/lean methodology took center-stage, shipping became the focus

## Building + Shipping

- ✓ Ship it culture
- ✓ Continuous integration, continuous deployment, continuous testing
- ✓ Real-time monitoring and analysis
- ✓ New stack to enable this

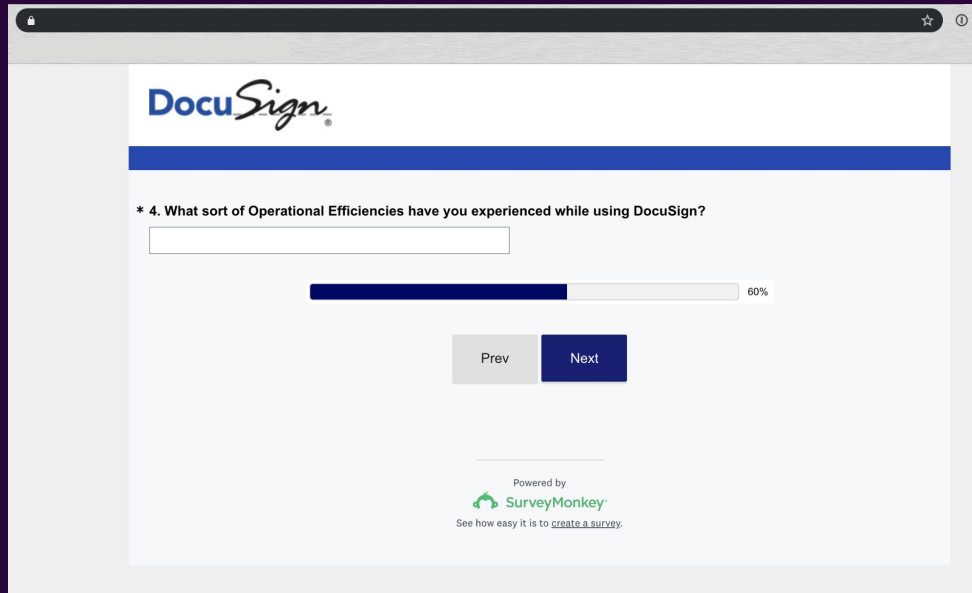
## User Research

- ✗ Still at beginning of development process
- ✗ Individual interviews
- ✗ Attempts at scale = email blasts for online surveys
- ✗ Replaced by quantitative analytics
- ✗ Outsourced to user research teams

# The product-first approach needs **continuous feedback**

User feedback/research should be collected  
**continuously throughout the user journey and product lifecycle,**  
not just in the beginning design phase,  
or on a per-project basis.

# This does not mean spamming users over email



The screenshot shows a web browser window displaying a DocuSign survey. The DocuSign logo is at the top left. Below it is a blue horizontal bar. The survey question is: "\* 4. What sort of Operational Efficiencies have you experienced while using DocuSign?". There is a text input field below the question. A progress bar below the input field shows 60% completion. At the bottom of the question area, there are two buttons: "Prev" and "Next". Below the buttons, it says "Powered by SurveyMonkey" with the SurveyMonkey logo. At the very bottom, there is a link: "See how easy it is to [create a survey](#)."

Traditional online surveys delivered via emails have low open/start rates and even lower response rates

# Enter the “microsurvey”

NPS Survey Simple Form

How likely are you to recommend us to a friend or colleague? \*

Not Likely Extremely Likely

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

How did we disappoint you and what can we do to make things right?

NPS is a microsurvey that's  
become wildly popular  
predominantly due to its  
simplicity



# Yet the way NPS is conducted today is still basic

- ✗ Often sent via email (low response rates)
- ✗ Sent in batches (not triggered based on activity)
- ✗ Recurrence based on time (not contextualized based on user journey)
- ✗ Single broad question (hard to process)

For better feedback, you need a system that is contextual, data-driven, and easy to answer

Contextual



In-Product

Data-driven



Event-triggered

Easy



Micro-format

# Some examples of continuous feedback in action

## 1. Hubspot testing satisfaction with new UX

The screenshot shows the Chameleon app listing form. The form is titled "Listing info" and includes a navigation bar with tabs for "Listing info", "App details", "Pricing", "Support info", and "Review info". The "Listing info" tab is active. The form contains several input fields: "Public app name" (with "Chameleon" entered), "Company name", and "Tagline". A feedback popup is overlaid on the form, asking "What do you think of the new app listing experience?" and providing three emoji options: a red sad face, a yellow neutral face, and a green happy face. The popup also includes a close button (X) and a character count (113/70). The form also includes a "Connect button URL" field and a "Submit for review" button.

Back to app listings Chameleon Preview Save Submit for review

Listing info 1 App details 4 Pricing 1 Support info 1 Review info

Listing info

Name and categorize your app so users can find it.

App information

Public app name \* Chameleon 9/30

Company name \* 0/40

Tagline \* 113/70

Connect button URL \* integrations/hubspot-integration-usr

Add some basic info

Fill out your app name and tagline. Your tagline is a quick description of what your app does. Your tagline will appear next to your app's name and be used to show your app in relevant search results.

For the connect button URL, enter the URL on your website where people will be sent to connect your app with HubSpot.

Upload your logo or icon

Chat Help

What do you think of the new app listing experience?

😊 😐 😞

# Some examples of continuous feedback in action

## 2. Segment requesting self-serve feedback on a new feature

The screenshot displays the 'List of Destinations' interface. At the top, there is a search bar and a notification bell. A feedback banner is visible, stating 'Help us make the new Destinations page better!' with a 'Send Feedback' button. Below the banner, the 'My Destinations' section includes a search input field and an 'Add Destination' button. The main content is a table with the following columns: Name, Status, Category, Created At, and Sources. The table is sorted by category and filtered by status. The data rows are as follows:

Name	Status	Category	Created At	Sources
Sorted by category. Filtered by status. Clear.				
Zapier for Marketing site source	Enabled	Raw Data	10 months ago	[Icon]
Zapier for Benjamin-Ruby source	Enabled	Raw Data	10 months ago	[Icon]
Chameleon for Chameleon App source	Enabled	Personalization	a year ago	[Icon]
Chameleon for test - 1 source	Enabled	Personalization	3 years ago	[Icon]
Chameleon for main source	Enabled	Personalization	4 years ago	[Icon]

# Some examples of continuous feedback in action

## 3. Asana running in-product NPS

How likely are you to recommend Asana to a friend or colleague?

0 1 2 3 4 5 6 7 8 9 10

Not at all likely Extremely likely

Submit Answer

Content Calendar

List Board Timeline Calendar Progress Forms More...

Last task completed on Tuesday

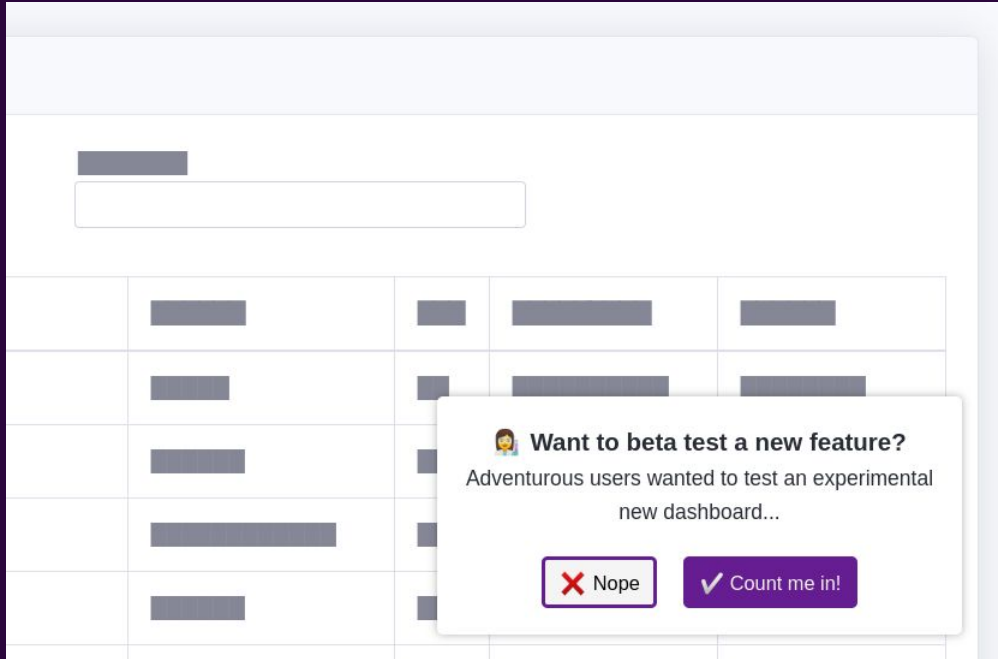
All tasks Filter Sort Rules

# Some examples of continuous feedback in action

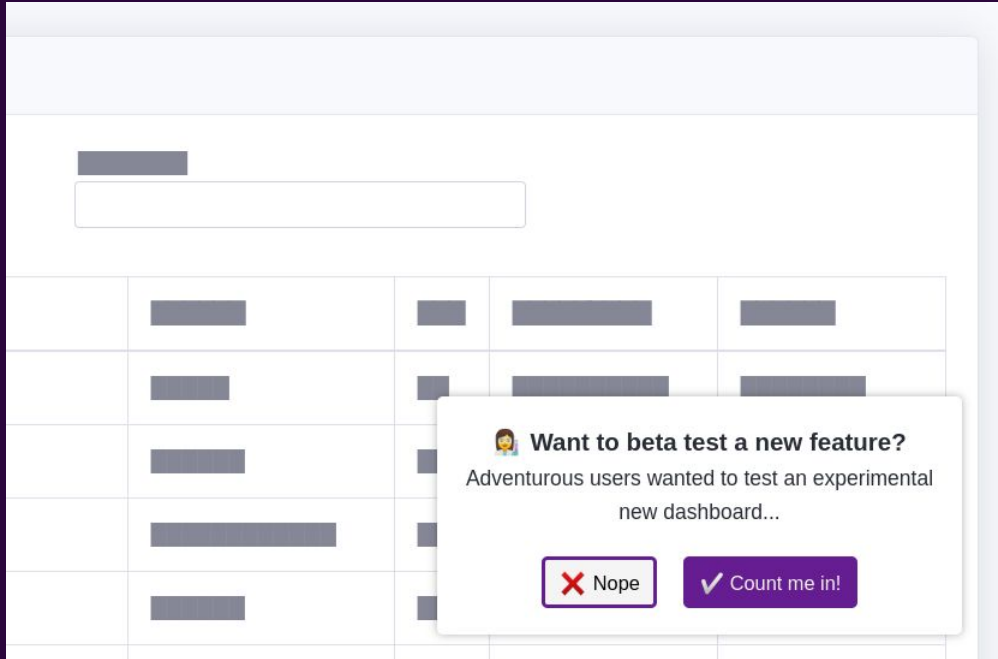
4. PeopleGrove opt-in for more detailed COVID survey

The screenshot displays a website interface with a survey overlay. The background shows a list of items, including 'Executive Education' with a 'More Info' button, and 'San Francisco Computer History Museum' with a 'Register' button and a 'More Info' button. Below this, there is a section for 'Markets' and a 'CT MANAGER' profile with a star icon and the text 'enterprise-level technology'. The survey overlay is a white box with a teal shadow, containing the text: 'PeopleGrove is dedicated to supporting you during COVID-19. Please take this one-minute survey to help us understand how to help and support you.' At the bottom of the overlay are two buttons: 'No thanks' with a thumbs-down icon and 'Yes please!' with a thumbs-up icon.

# Other ideas for microsurveys: beta opt-ins

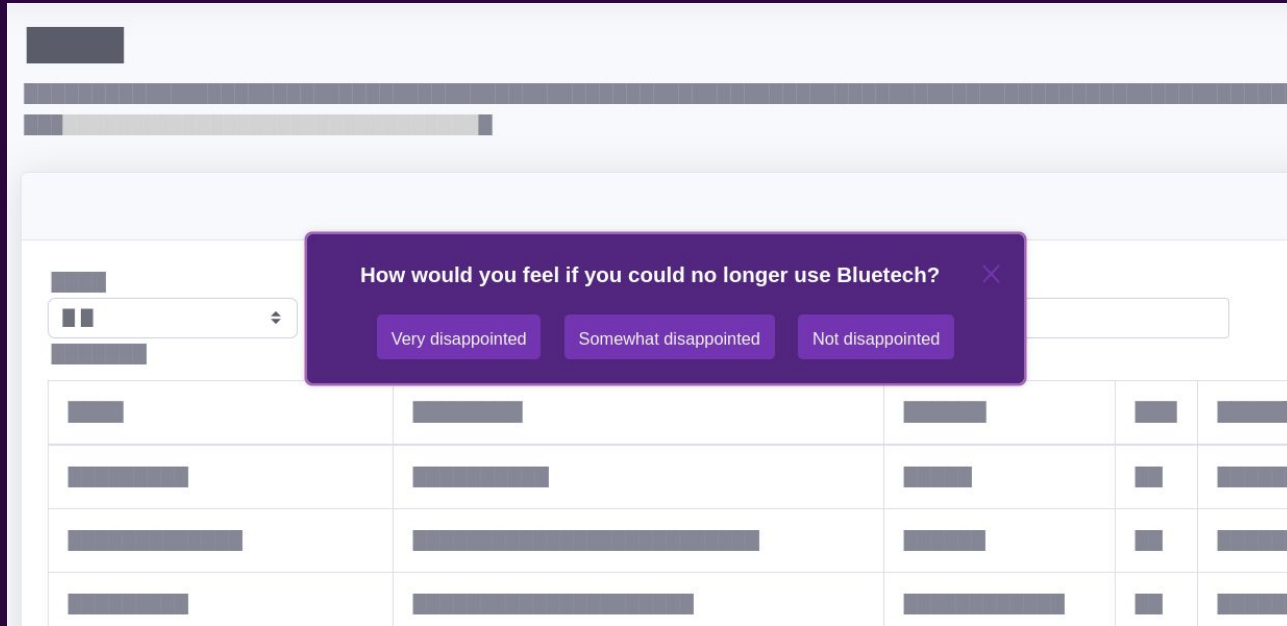


# Other ideas for microsurveys: beta opt-ins

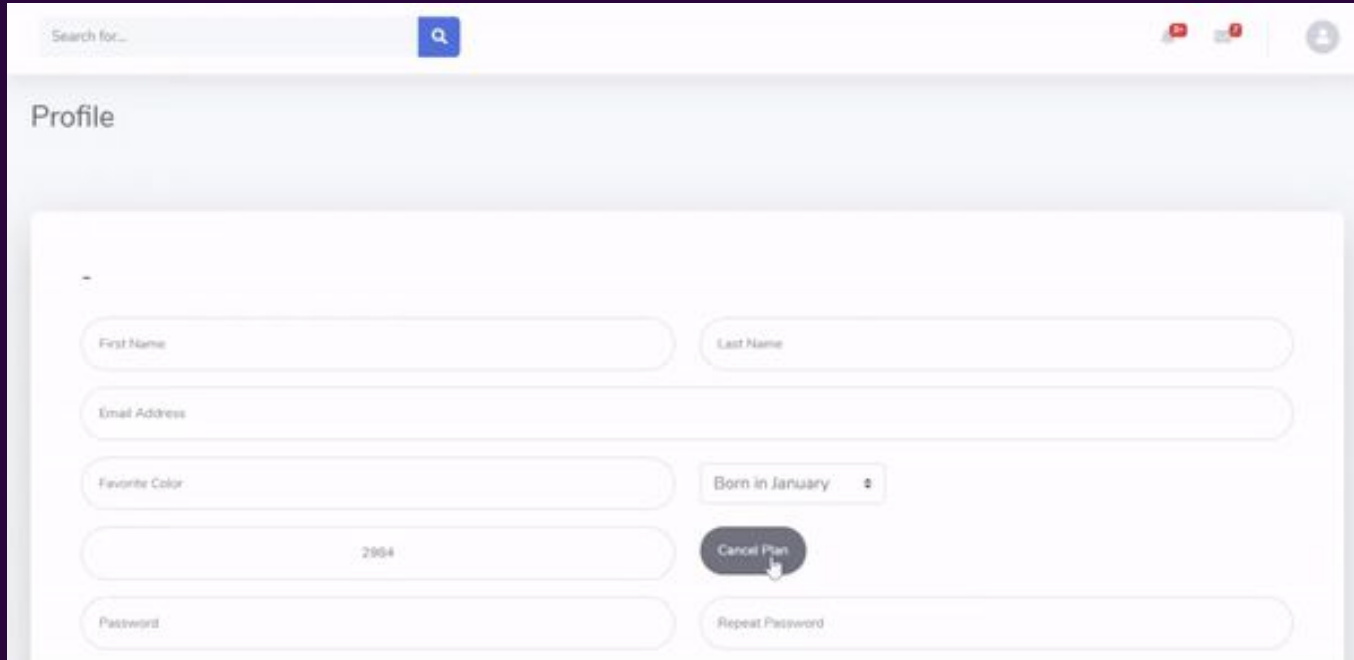




# Other ideas for microsurveys: PM Fit Survey



# Other ideas for microsurveys: cancellation feedback

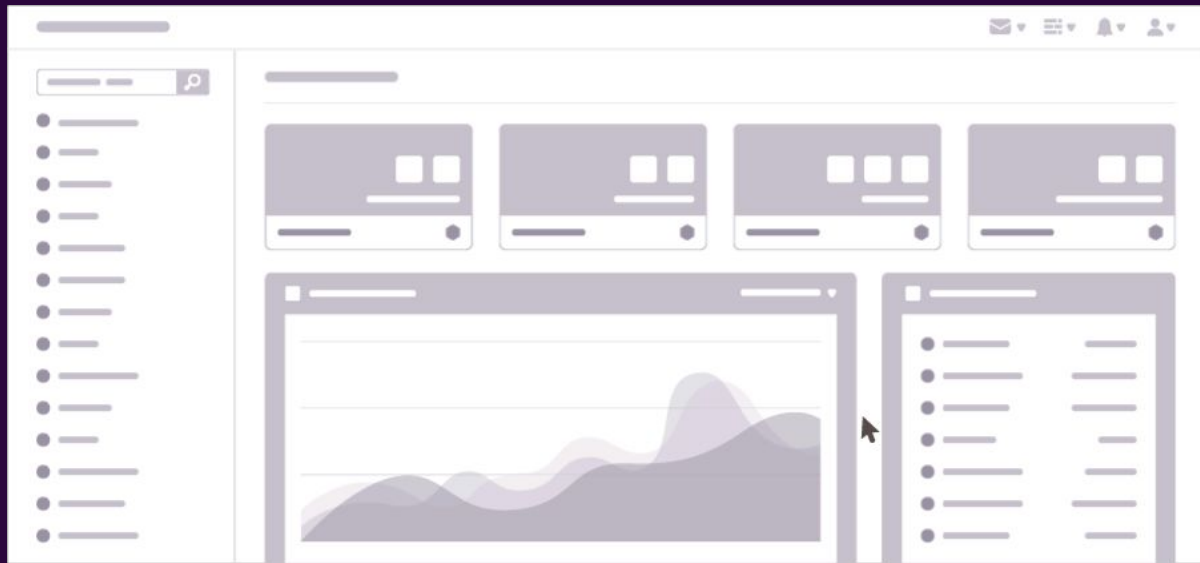


The image shows a web browser window displaying a user profile form. The browser's address bar contains the text "Search for..." and a search icon. The page title is "Profile". The form contains several input fields: "First Name", "Last Name", "Email Address", "Favorite Color", "Born in January" (a dropdown menu), "2004" (a year input field), "Password", and "Repeat Password". A dark grey button labeled "Cancel Plan" is positioned between the "Born in January" dropdown and the "2004" input field. A mouse cursor is hovering over the "Cancel Plan" button, indicating it is the focus of the microsurvey.

# Best practices for effective microsurveys

- One goal per survey; prioritize ruthlessly
- Ensure relevancy
- Trigger based on user data, such as action (or inaction)
- Avoid fatigue by limiting cadence and offering gratitude
- Link to your analytics system, database and Slack
- Have a team lead that owns continuous feedback

# Chameleon enables you to easily build in-product microsurveys without engineering



- Install via Segment or JS
- Templates to get started
- No code Builder
- Fully customize design
- Dashboard, API, and integrations for results
- Rate-limiting control

# Next steps

- [trychameleon.com/surveys](https://trychameleon.com/surveys) for info about our microsurveys product
- [trychameleon.com/blog](https://trychameleon.com/blog) for more “continuous feedback” content