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SUCCESS KIT:

How to rethink and reinvent research

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INTRODUCTION

New normal? We need to make it a ‘better normal’

> *An organization's ability to learn, and translate that learning into rapid action, is the ultimate competitive advantage.*
>
> **Jack Welch**
> *Former CEO,*
> *General Electric*

2020 is one for the history books — a global pandemic, an international movement for social justice, and an economic slump on a once-in-a-lifetime scale.

Together, they've forced us all to rethink how we live, work, and play.

Our preferences, both as employees and customers, have shifted at lightning speed. In the past six months we've seen several years' worth of innovation as people have been forced to adapt new ways of working, actively seek out new products and services, and re-evaluate the brands we choose to buy from.

In other words, it's thrown the existing order into chaos.

And at the center of it all are the researchers tasked with the job of understanding what's happening and, crucially, how their organizations need to react.

WorkDifferent is all about making sense of the chaos, hearing from the world's leading brands and thought leaders about how we write the playbook to come out on the other side.

The organizations that thrive in the new normal will be the ones that listen to every stakeholder, identify emerging experience gaps, and act quickly to close them and redefine the experiences customers and employees need in the new world.

As we spoke to thought leaders and researchers at brands like Chobani, Uber Eats, and Pinterest, it was clear that as we look toward the 'new normal,' the lessons learned from 2020 will set organizations up for success as they chart a course forward.

New normal? We need to make it a 'better normal'

From exploring their own new ways of working, to looking at what it will take to be successful in the coming months, three key themes came across that will be essential to every researcher:

- **Move quickly** — We've seen as much change in 2020 as we've seen in decades before. And when things change so quickly, you need to be able to move with it; that means having access to the right data, the right stakeholders, and the right culture to be able test, learn, and iterate in order to respond.
- **Focus on action** — Actionable insights have always been the gold standard for research, and that's even more true in a world where almost everyone is asking 'what do we do next?'
- **Hear every voice** — Taking the right actions starts with listening to the right people, and as channel preferences change, inboxes become overloaded, and our daily patterns of working shift, you need to adapt your listening strategy. By listening across a diverse range of channels, you can see the holistic picture, and get a better understanding of what's really happening in your market.

In this success kit, you'll find all the key takeaways from our WorkDifferent sessions to help you reinvent and rethink your research in the new normal.

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Getting buy-in on urgent action

Getting buy-in on urgent action

In times of crisis, organizations need to rally and act quickly. In this Q&A, Kitty Xu, Quantitative User Experience Research Lead at Pinterest, and JD Schramm, Lecturer/Author, explored how researchers can use storytelling to help engage stakeholders and drive action in their organizations.

KEY TAKEAWAYS

1. Visuals matter now more than ever

In the era of video conferencing, where phrases like 'Zoom fatigue' have now entered the public lexicon, it's more important than ever that researchers are able to draw stakeholders in and tell their story.

To help understand what good visual storytelling is, JD Schramm talked through his 'FIRE' model:

- **F**ocus the audience's attention
- **I**nclude the right visual
- **R**educe clutter
- **E**valuate the effectiveness

> *"Right now we're doing everything on video conference, so a lot of the body language cues we'd normally use are not available to us. It's more important than ever to make your story crystal clear."*
>
> **Kitty Xu, PhD**
> *Quantitative User Experience Research Lead, Pinterest*

WATCH THE SESSION

2. Prioritize for your stakeholders

Kitty talked about a recent project at Pinterest to understand which features help users understand the platform better, and what action the team would need to take to improve them, and how to increase usage on the platform.

Using feature prioritization techniques and plotting 12 features on a matrix, Kitty and her team were able to focus their stakeholders' attention on the actions that would have the biggest impact. They were able to show which were most important, and after digging further into the data, surface the actions that needed to take place to improve them. By prioritizing for their stakeholders, and focusing on action, they could simplify it to four actions that needed buy-in to achieve the desired business outcome. Simple!

3. Be mindful of time

Particularly when you're presenting recommendations to senior stakeholders, force yourself to condense it into a shorter timeframe. You're not going to have an hour of their time, so ask yourself what's the most important thing you can tell them in 30, ten, or even five minutes.

By doing this, you practice focusing your story on the things your audience really cares about, to help retain their attention, and keep them focused on the actions they need to take.

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Move fast by eliminating the lag time

Move fast by eliminating the lag time

COVID-19 has forced every company to develop the ability to act fast and pivot. In this Q&A session, Maria Voronina, Strategic Planning Manager at Chobani, and Steven Wengrovitz, Head of Research at Uber Eats, explored how real-time feedback helped them act quickly to respond over six months of almost constant change.

KEY TAKEAWAYS

1. Keep your finger on the pulse

Both panelists provided the perfect example of why real-time insights are essential. When COVID-19 hit, consumer preferences and behaviors changed in a heartbeat, and only by having real-time insights could their teams react.

Uber Eats experienced a huge uptick in new users, requiring action to make sure both users and the restaurants they're buying from get the experience they needed. Meanwhile, as people shunned the grocery store and moved to online shopping, Chobani quickly realized a shift in behavior was key to identifying product gaps and reacting to meet new consumer demands.

> *"Through all that noise, and all that change, you still have to put your resources behind your biggest pillars."*
>
> **Maria Voronina**
> *Strategic Planning Manager, Chobani*

2. Take decisive action and focus your research

As Maria noted, the pandemic forced ten years of change in just a few short months, and acting quickly on insights has been key to keeping up with the market. Steven's advice was to reevaluate your research and focus on the projects you really need to complete. In some cases your answers will lie in research you've done before or obtained from other sources, so try to focus on the projects that will drive action and that demand real-time insights.

3. Test and learn — don't wait for perfection

It's something of a cliche for 2020, but we live in unprecedented times. The environment organizations are working in today is far different than six months ago, which was as different as the landscape 12 months ago — and we're all learning on the fly.

Maria mentioned the need to let go of thinking that things need to be perfect before you test them. In today's environment, it's better to test and iterate quickly than to wait for the moment to pass you by.

WATCH THE SESSION

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Listen before you act

Listen before you act

Taking the right actions starts with listening to the right people. Every customer has their own channel preferences, so in order to hear from a diverse pool of customers, you need to listen across multiple channels.

Hear from Jacqueline Lance, Senior Vice President, CX Insights, City National Bank, and Matt Dixon, Chief Product and Research Officer at Tethr, how researchers are reinventing their listening strategies to get closer to customers, and deliver better insights through a multi-channel approach

KEY TAKEAWAYS

1. New channels *add* to the survey; they don't replace it

More and more organizations are using additional channels alongside their surveys when it comes to customer research. The issue is not that the survey isn't useful, but that it's been misused as a tool to catch everything.

The panel explored how new channels such as always-on digital listening, voice analytics, and mobile feedback are more suited to a range of scenarios which many still survey for. But by taking those elements out of the survey and into new channels, you can keep your surveys focused on what they do best — taking a deep dive into the issues that really matter to your customers.

> *"Historically, if we wanted to understand a broader range of topics, we would just make our surveys longer. But today, you can pull from all these different data points and channels where people are giving feedback to really see the full picture."*

Jacqueline Lance
Senior Vice President, CX Insights, City National Bank

WATCH THE SESSION

2. Look across the whole picture

Score chasing is a phenomenon as old as surveying, and in customer care, it can limit your ability to diagnose and close experience gaps. Take call volumes for example; many teams will be targeted on reducing call volumes, and will hunt down the number one topic people call in about.

But as Jacqueline pointed out, that is not client experience. If you care about the customer, you need to look at what people are saying across all of the channels you're using to understand where the problem is coming from, get to the root cause of all of the frustration, and then tap into that to deliver better experiences.

3. Start small, and grow your channel mix

The survey remains an integral part of the listening ecosystem, so as you look to add new channels to your listening strategy, start by adding them alongside surveys on an existing project, starting with one or two new channels.

This uncovers the value those channels bring in addition to the survey, and you can test and learn on a small scale rather than looking for 30 ways to listen to people in a single project.

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Every voice matters

Every voice matters

The old way of collecting data wasn't designed with diversity and inclusion in mind. In this Q&A, Mandy Sha, Research Director and Author of The Essential Role of Language in Survey Research, and Emily Geisen, Senior XM Scientist at Qualtrics, discussed ways to ensure that voice is heard.

It goes way beyond just getting your demographic questions right. Every researcher will have their own biases, both conscious and unconscious, and understanding those biases and knowing how to account for them are vital when it comes to making your research more inclusive.

KEY TAKEAWAYS

1. Acknowledge your assumptions

The first step to reducing some of the bias is simply acknowledging that we make assumptions — based on our limited experiences with the world — when we write survey questions.

You can mitigate this to some extent by thinking about how people with different backgrounds and experiences would answer each question. For example, even a seemingly simple question like, "How long have you lived in your house?" makes an assumption that everyone lives in a house. It's excluding people who live in apartments, condos, mobile homes, or who are homeless. The end result could be that people disengage with your survey, and give poor quality data.

"If the questions and answer categories do not reflect what and how the participants see themselves or not in a way that they can understand, then they either give inaccurate responses or refuse to participate. Both of these lead to bad data, which leads to bad insights."

Mandy Sha
Research Director & Author of The Essential Role of Language in Survey Research

WATCH THE SESSION

2. Use cognitive testing before you launch

When different respondents have different understandings of a question, it leads to bad data. Pre-testing is a great way to help ensure an inclusive and diverse survey design, and within that, using a technique called cognitive testing can help identify the possibility that different people will understand a question differently.

It works by testing your survey with a small group of respondents and having them talk through their decision-making as they answer each question. This allows you to hear your respondents, in their own words, describe how they understand the questions and response categories, and how they ultimately make the decision on how to answer.

3. Pretest again after translation

Many researchers fall into the trap of pretesting surveys, translating them, and then fielding them without going through another round of pretesting.

But as Mandy pointed out on the panel, just because the dictionary translation is correct, different languages and cultures interpret the meaning of words differently. So in cross-national studies, you need to do another round of pretesting after translation to ensure that your questions are universally understood and you get quality data and insights from every country in your study.

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Want more expert insight on how to ‘work different’? Hear from thought-leaders at the world’s most iconic brands.

You’ll get how-to sessions on how they’re moving forward and demos of ready-to-go solutions to help you drive change.

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