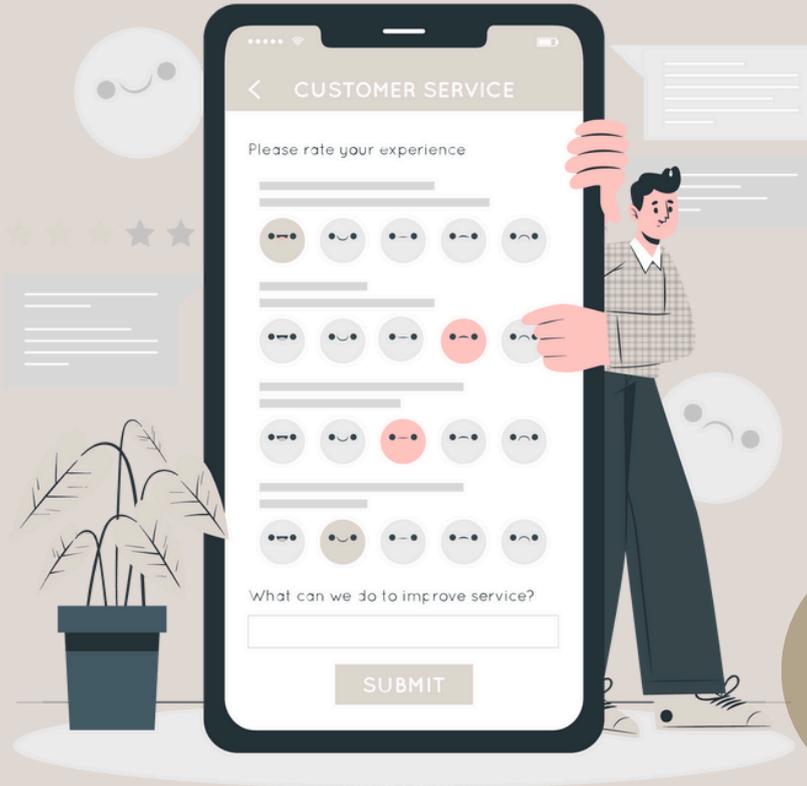Design with confidence—ask the right questions at the right time

# SURVEYs

Everything you need to know to confidently plan, write, and analyze UX surveys.

# Contents

# What are Surveys?

Surveys are a powerful tool in a UX researcher's toolkit. When used correctly, they can help you understand user needs, measure behaviors, and support design decisions with data. This guide will walk you through the full process of conducting user research using surveys—from defining goals to writing questions, analyzing results, and sharing insights.

# Start with a Clear Goal

**Before writing a single question, ask:**
- What do I want to learn?
- What decision will this information help me make?
- Is a survey the right tool for this?

**Surveys are best when you need to:**
- Reach a large number of users quickly
- Quantify behaviors or opinions
- Gather structured feedback

They are not ideal for deep exploration of complex behaviors, emotional responses, or usability testing. For those, consider interviews or observational studies.

> Example Goals:
> - Measure user satisfaction with a new feature
> - Understand how often a task is performed
> - Identify common barriers to product use

# Choose the Right Time

The timing of your survey should align with the product development lifecycle. Each phase offers different opportunities for learning. Here's how to use surveys strategically throughout:

| PHASE | GOALS | METHODS |
|---|---|---|
| **Discovery (Pre-prototype)** | Understand user needs & context | Use surveys to explore user goals, behaviors, and unmet needs. Ask broad open- and closed-ended questions to identify opportunities. |
| **Validation & Testing** | Evaluate design concepts | Embed short surveys within usability tests or prototypes to assess satisfaction, ease of use, or preferences. |
| **Launch** | Monitor early use and feedback | Run post-launch surveys to collect first impressions, satisfaction levels, and identify any usability or onboarding issues. |
| **Post -Launch** | Ongoing optimization | Use recurring surveys (e.g., NPS, CES) to track user satisfaction over time and detect shifts in user needs. |

**Tips & Callouts:**

- Don't wait until post-launch to gather feedback—early insights save rework.
- For Launch and Post-Launch, keep it short to avoid fatigue.
- Always match survey questions to product maturity and decision needs.

# Understand Survey Types

## Quantitative Surveys

- Use structured, closed-ended questions (e.g., rating scales, multiple choice)
- Provide data that can be analyzed statistically
- Ideal for measuring things like frequency, satisfaction, preferences

Always pilot your survey with at least 4–5 people using a think-aloud method to catch misinterpretations and technical bugs.
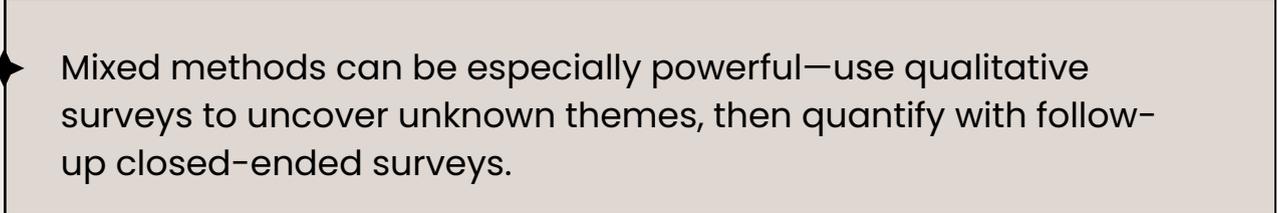
## Qualitative Surveys

- Include open-ended questions
- Provide insights into motivations, needs, pain points
- Better for exploratory research or supplementing quantitative findings

## Mixed-Methods Surveys

- Combine both types to get a fuller picture

Mixed methods can be especially powerful—use qualitative surveys to uncover unknown themes, then quantify with follow-up closed-ended surveys.

# Write Effective Survey Questions

**Good survey questions are:**

- **Clear:** Avoid jargon or technical terms
- **Specific:** Ask about one thing at a time
- **Unbiased:** Don't lead users toward a certain answer
- **Actionable:** The answer should inform a decision or direction

**Types of Questions**

1. **Closed-Ended Questions (Quantitative)**
   - Multiple Choice: "Which of the following best describes your role?"
   - Likert Scale: "How satisfied are you with the onboarding process? (1 = Very dissatisfied, 5 = Very satisfied)"
   - Frequency: "How often do you use the reporting dashboard?"
     - Daily / Weekly / Monthly / Rarely / Never
2. **Open-Ended Questions (Qualitative)**
   - "What challenges do you face when using the dashboard?"
   - "What's one thing we could improve in your experience?"
   - "Describe a recent situation where you struggled to complete a task."
3. **Demographics & Segmentation**
   - "What is your job title?"
   - "How many employees are in your company?"

4. **Behavioral Questions**
   - "Which features do you use most often?"
   - "When was the last time you used this product/service?"

5. **Attitudinal Questions**
   - "How confident do you feel when performing [task] using our tool?"
   - "To what extent do you agree with: 'The product meets my needs'?"

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**Tips for Strong Survey Questions:**

**Avoid double-barreled questions:**
   - Wrong: "How easy and enjoyable was it to complete the task?"
   - Better: "How easy was it to complete the task?" and "How enjoyable was it?"

**Avoid leading or loaded language:**
   - Wrong: "How amazing was your experience?"
   - Better: "How would you rate your experience?"

**Make scales consistent and balanced:**
   - Use the same directionality and labeling (e.g., 1 = Strongly disagree, 5 = Strongly agree)

**Pilot open-ended questions to ensure clarity and usefulness:**
   - You don't need too many 1–3 can be very revealing

**End with a general feedback prompt:**
   - "Is there anything else you'd like to share with us?"

**Use conditional logic to streamline long surveys:**
   - Only show relevant questions based on previous answers

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# Design and Test Your Survey

**Structure Your Survey Logically:**
- Start with easier or engaging questions
- Group related topics together
- End with optional or open-ended questions

**Test Your Survey:**
- Run pilot tests with 2–5 people
- Ask them to think aloud as they complete it
- Look for confusion, drop-offs, or misinterpretations

**Technical Tips:**
- Keep it short (5–10 minutes max)
- Randomize choices when relevant to reduce order bias

**Tip:** Always test whether terms and concepts are understood similarly across user groups.

# Recruiting Participants

**Who you survey matters. Define your target user segment:**
- Current users? Prospects? Churned users?
- Specific demographics or roles?

**Recruitment Tactics:**
- In-product intercepts
- Email invites
- Panels or user communities

**Ensure Ethical Participation:**
- Get informed consent
- Be clear about anonymity and data use
- Offer incentives if appropriate

**Tip:** Consider using random sampling when you need statistically valid results—especially for segmentation analysis.

# Analyze the Data

**Quantitative Analysis:**
- Use charts and stats to identify trends
- Compare segments (e.g., new vs. experienced users)
- Focus on significant differences, not just the averages

**Qualitative Analysis:**
- Group open-ended responses into themes
- Highlight quotes that illustrate user needs or frustrations

**Look for Patterns:**
- Are there contradictions? Surprises?
- Do qualitative comments explain quantitative trends?

# Share Your Findings

**Your insights should drive action. Tailor your output to your audience:**
- Product teams: Prioritized needs and feature ideas
- Leadership: Business implications and opportunities
- Designers: Quotes and pain points for personas or journey maps

**Deliverables Include:**
- A slide deck of key insights
- In-put to the Glean.ly repository with tagged themes

Use storytelling techniques—real user quotes, visuals, and concrete takeaways—to make the data stick.

> **Quote from Erika Hall:**
> "The goal is not to collect data. The goal is to inspire decisions."

# Final Tips

- Don't over-rely on surveys—pair them with qualitative methods
- Avoid asking questions you can't act on
- Keep a record of past surveys to avoid repetition
- Always pilot test before launching

◆ **Tip:** Surveys are easy to deploy, but hard to design well. Treat them with the same rigor as other research methods.

**Key Reminders for the Process**

- Involve stakeholders throughout—research is more impactful when it's co-created.
- Be flexible—iterate as you learn.
- Keep documentation organized—add it to the research repository for long-term impact.
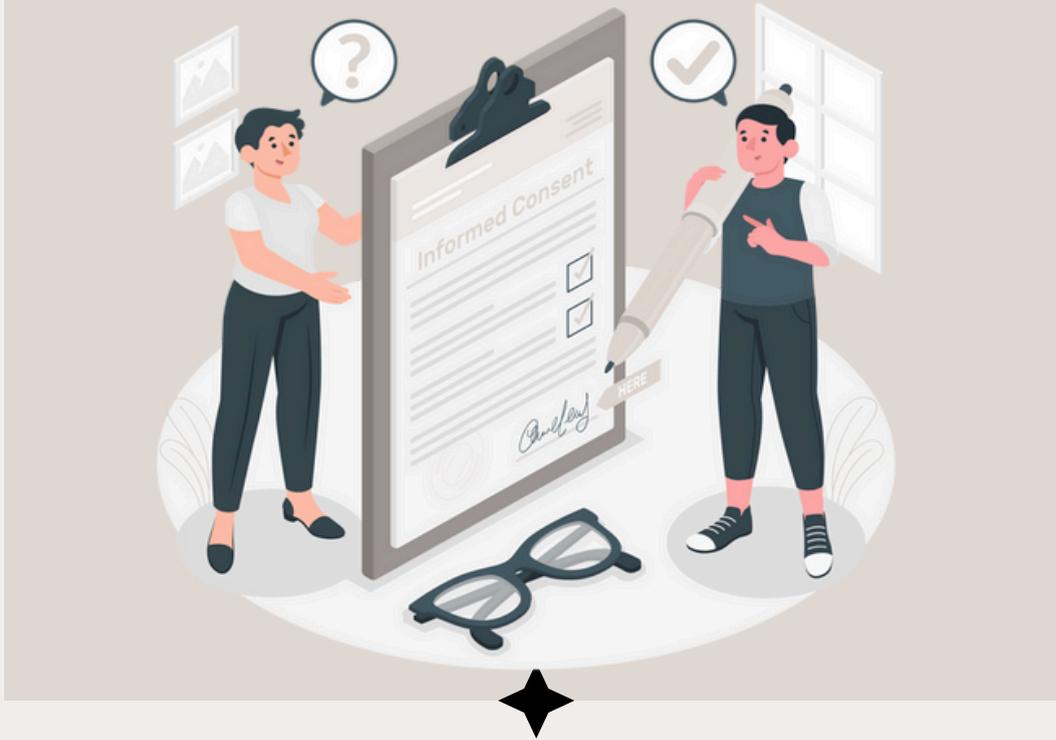
# Resources

**Recommended Additional Reading & Frameworks**

- Nielsen Norman Group: Survey Best Practices
- NN/g: Should You Run a Survey?
- NN/g: Designing Surveys in the UX Lifecycle
- NN/g: 28 Tips for Qualitative Surveys
- Interaction Design Foundation: UX Surveys
- Erika Hall's "Just Enough Research"

## INTERNAL RESOURCES

| | |
|---|---|
| **Research repository** | Glean.ly |
| **Survey tools** | Maze, Appcues, Google form |
| **UX research page** | UX Portal |

# Checklist

## Phase 1: Define & Plan

- ☐ Define your research question(s) and what you want to learn
- ☐ Confirm a survey is the right method (vs. interview, usability test)
- ☐ Identify the product phase: Discovery, Validation, Launch, Post-Launch
- ☐ Choose survey type: Quantitative, Qualitative, or Mixed
- ☐ Draft a basic research plan (goals, audience, timing, ownership)

## Phase 2: Design the Survey

- ☐ Write clear, specific, and unbiased questions
- ☐ Use balanced rating scales (e.g., 1–5 or 1–7 Likert)
- ☐ Avoid double-barreled and leading questions
- ☐ Add 1–3 open-ended questions for context or discovery
- ☐ Use conditional logic to show only relevant questions
- ☐ Organize the survey: easy start, grouped themes, open-ended at end

## Phase 3: Test & Iterate

- ☐ Run a pilot test with 3–5 users (preferably think-aloud)
- ☐ Check clarity, timing, and user engagement
- ☐ Revise unclear or skipped questions
- ☐ Confirm technical setup (mobile compatibility, logic branches)
- ☐ Add progress indicators if survey is over 10 questions

## Phase 4: Recruit & Distribute

- ☐ Define your target audience (segment, criteria)
- ☐ Choose recruitment method: email, intercept, panel, etc.
- ☐ Draft invitation message (goal, length, confidentiality)
- ☐ Obtain informed consent (opt-in and data handling)
- ☐ Monitor participation and response rates

## Phase 5: Analyze the Results

- ☐ Clean and organize data (remove incomplete responses)
- ☐ Chart quantitative responses by segment (e.g., role, usage)
- ☐ Thematically code open-ended responses
- ☐ Identify patterns, outliers, and contradictions
- ☐ Link findings to original research questions

## Phase 6: Share & Act

- ☐ Create a clear insights summary (slide deck)
- ☐ Tailor insights by stakeholder (product, leadership)
- ☐ Use quotes and visuals to humanize the data
- ☐ Suggest concrete next steps, recommendations & opportunities
- ☐ Store findings in the research repository for future reference

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