

Collecting User Feedback: A Case Study

How a financial institution can improve its customer feedback strategy so that they can build better digital experiences

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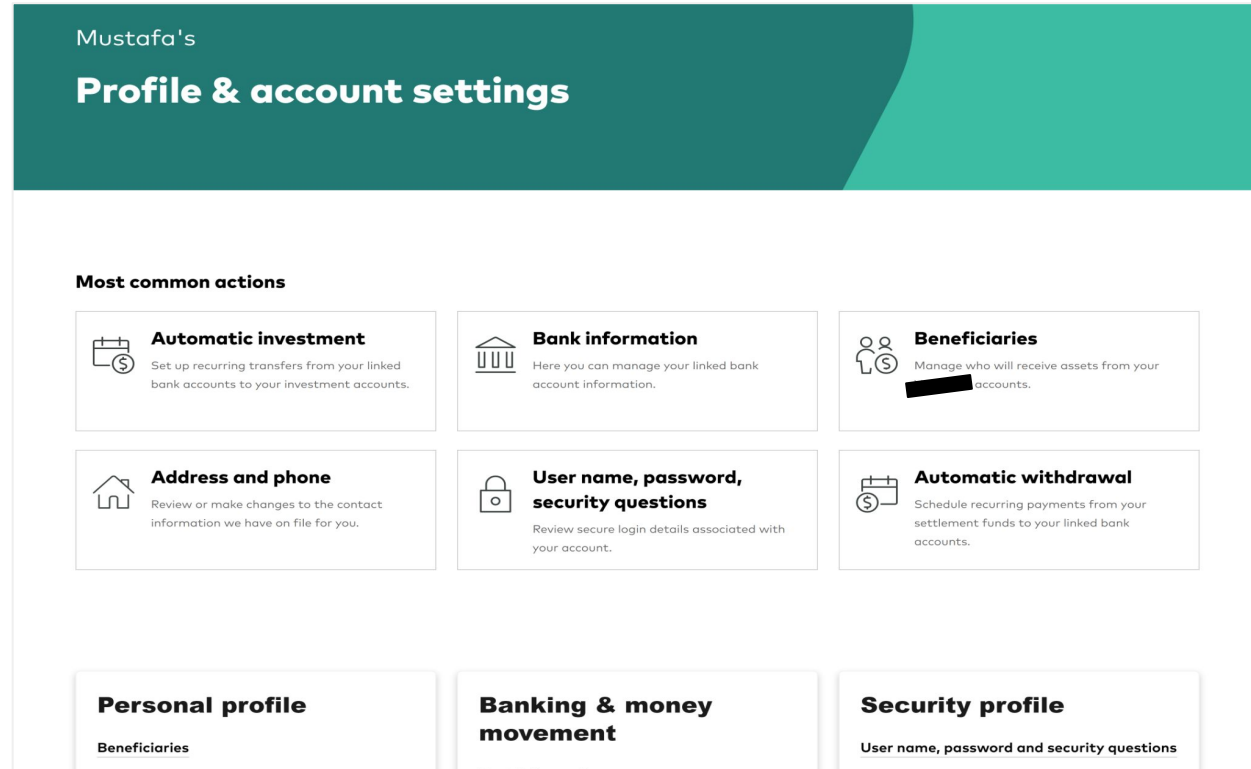


A leading financial institution recently launched a new digital experience

First impressions:

The product / digital team has done a good job designing this experience,

- Page is well laid out and easy to read
- Top user tasks (i.e jobs to be done) are upfront and center
- Additional tasks are easy to find and available below the fold



As part of the upgrade the product team also included a user feedback survey

Asking for feedback is a good idea:

It is a great way to measure the effectiveness of the new experience.

I decided to take the survey.

The image shows a user interface for 'Mustafa's Profile & account settings'. A survey modal is displayed in the center, titled 'Help us improve our site'. The survey asks for overall satisfaction with the Vanguard website experience, with a 5-point scale from 'Not at all satisfied' to 'Extremely satisfied'. It also asks if the user has recently completed a task in the Profile & Account Settings section, with options for 'Yes', 'No', or 'I'm not done yet'. A disclaimer states that personal information should not be included and that responses will be used in accordance with the privacy policy. The survey is powered by Medallia. A red 'Click!' label with an arrow points to the 'Submit' button. The background shows sections for 'Most common actions' (Automatic investment, Address and phone), 'Beneficiaries', 'Automatic withdrawal', 'Personal profile', 'Banking & money movement', and 'Security profile'.

Mustafa's
Profile & account settings

Most common actions

Automatic investment
Set up recurring transfers from your linked bank accounts to your investment accounts.

Address and phone
Review or make changes to your contact information we have on file for your accounts.

Beneficiaries
Manage who will receive assets from your Vanguard accounts.

Automatic withdrawal
Schedule recurring payments from your settlement funds to your linked bank accounts.

Personal profile
Beneficiaries

Banking & money movement

Security profile
User name, password and security questions

Help us improve our site

Overall, how satisfied are you with your Vanguard website experience?

1 2 3 4 5
Not at all satisfied Extremely satisfied

Have you recently completed a task in the Profile & Account Settings section of our website?

Yes No I'm not done yet

Please don't include personal information such as your name, birth date, Social Security number, or account numbers. Your responses will be used in accordance with our [privacy policy](#).

Close Submit

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Click!

Unfortunately, the feedback approach needs more work. First, the survey is confusing, ambiguous, and redundant

Survey is not user friendly:

Confusing: What is the user being asked to rate? General look & feel? Completing a task? Which task? How to find things? Helpful?

Ambiguous: Hard for the user to score site security & performance

Timing: Pops up too soon, even before I had a chance to complete my task

Help us improve our site

Overall, how satisfied are you with your website experience?

1 2 3 4 5
Not at all satisfied Extremely satisfied

Have you recently completed a task in the Profile & Account Settings section of our website?

Yes No I'm not done yet

How satisfied are you with the Profile & Account Settings experience?

1 2 3 4 5
Not at all satisfied Extremely satisfied

Specific to your experience with the Profile & Account Settings section of our website, please rate your satisfaction with the following website categories:

Security

1 2 3 4 5
Not at all satisfied Extremely satisfied

Content

1 2 3 4 5
Not at all satisfied Extremely satisfied

Range of Features & Tools

1 2 3 4 5
Not at all satisfied Extremely satisfied

Performance

1 2 3 4 5
Not at all satisfied Extremely satisfied

Design

1 2 3 4 5
Not at all satisfied Extremely satisfied

Navigation

1 2 3 4 5
Not at all satisfied Extremely satisfied

Ease of Use

1 2 3 4 5
Not at all satisfied Extremely satisfied

Please tell us how we can improve your experience today.

Please don't include personal information such as your name, birth date, Social Security number, or account numbers. Your responses will be used in accordance with our [privacy policy](#).

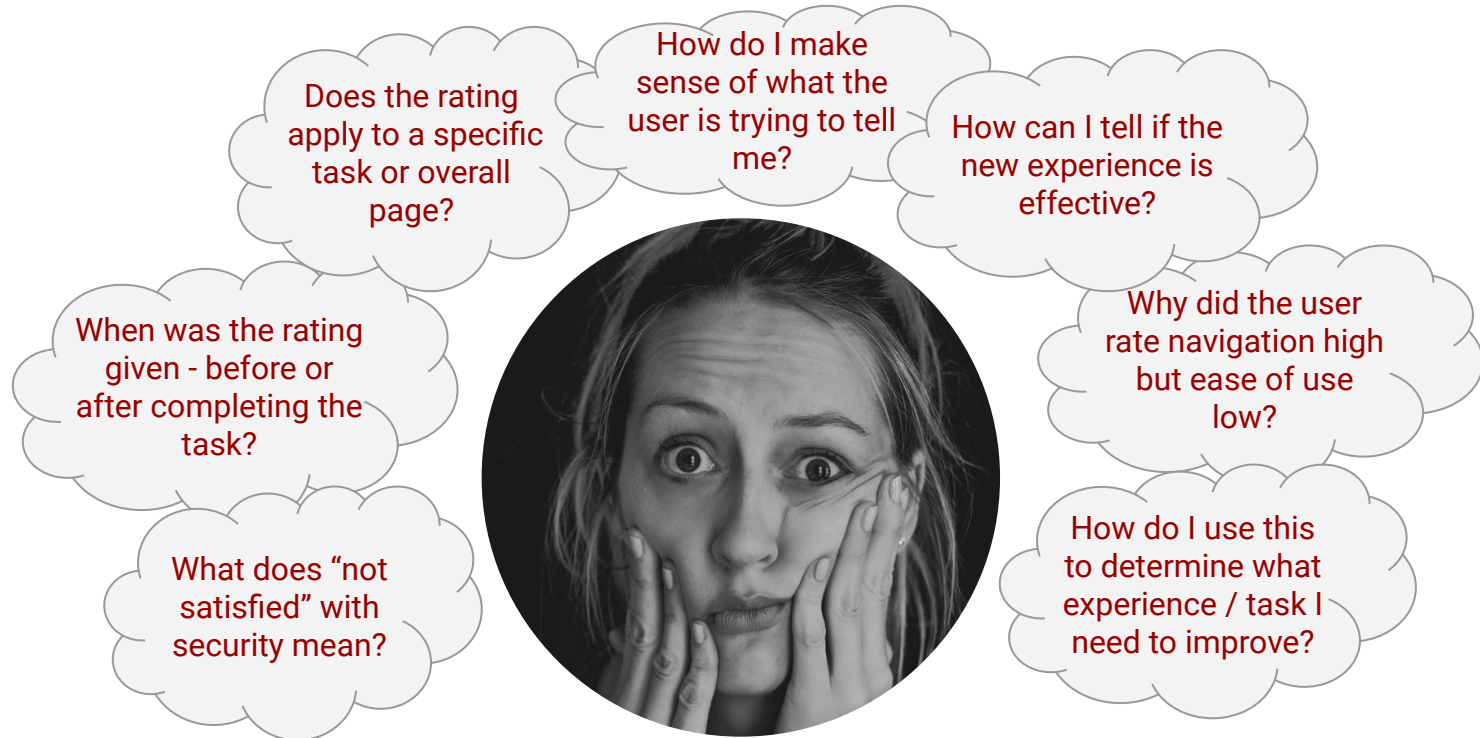
Close Submit

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Redundant: Isn't ease of use, navigation, and design all mean the same thing (from a user's perspective)

Second, the data being collected is not actionable

Challenges with understanding user feedback:



The good news is that it is easily fixable

Consider the following three step strategy:

1

Define Success Metrics

Identify critical user tasks (jobs to be done) that are worth measuring
Develop user experience success metrics

2

Redesign Feedback Survey

Update the feedback form to,

- Collect feedback on critical tasks only
- Make it more user friendly / less confusing

3

Improve Experiences

Review user feedback on a regular basis - biweekly / monthly
Leverage feedback to build new / fix existing experiences, continuous improvement

Step 1: Define success metrics

There are 40+ tasks listed on the profile page. Recommend the team identify handful of key tasks and set success targets.

A. Identify popular tasks:

(examples)

- Set up automatic investment
- Set up automatic withdrawal
- Manage bank information
- Manage beneficiaries
- Change address or phone
- Change name or password
-

B. Develop success metrics:

(sample)

Metric	Target
Task Success Rate	90%
Ease Of Completion	4 out of 5
Confidence / Helpful	4 out of 5
User Satisfaction	4 out of 5

Step 2: Redesign feedback survey

Redesign the survey for ease of use and only collect relevant metrics (as defined in step 1)

Help us improve your experience

What were you trying to accomplish today? (*pick one*)

- Set up automatic investment
- Set up automatic withdrawal
- Manage bank information
- Manage beneficiaries
- Change address or phone
- Change name or password
- Other: _____

Were you able to complete your task?

1 2 3
No Not Sure Yes

Did you find completing your task easy?

1 2 3 4 5
Not at all easy Extremely easy

How helpful was the new experience for achieving your task?

1 2 3 4 5
Not at all helpful Extremely helpful

How would you rate the overall experience of completing your task?

1 2 3 4 5
Not at all satisfied Extremely satisfied

Please tell us how we can improve your experience: _____

To improve response rates & quality of data:

Display survey after the user has completed a task

Focus survey on the key tasks and metrics

Keep the survey short and simple

Upto 5 questions is a good rule of thumb

Step 3: Improve digital experiences

Review user feedback regularly and leverage data to develop new / fix current experiences.

Continuous improvement process overview (high level):

Process Objective	Measure impact of the new experience Uncover user issues / improvement opportunities
Steps	<ol style="list-style-type: none">1. Collect & analyze user feedback2. Compare user ratings to success metric targets3. If metrics are not being met, identify & prioritize user experience areas that need improvement4. Add experience to product discovery backlog5. Make changes to metrics, targets, and survey (as needed)
Who	Product Manager (business), Product Owner (IT), UX Manager, and Engineering Lead
Frequency	Every 2 weeks (for first 2 - 3 months post launch) Every month or quarterly after that

Additional consideration - for deeper insights, go beyond user feedback, interview customers and monitor behavior

Get to know your users using the following three techniques:

Monitoring via Instrumentation

Lots of data, requires deep analysis, build behavior models

Metrics: Task time, # of clicks, abandonment rate, availability, response time, site speed, error rates etc.



Customer Interviews

Best type of data, high quality, deep insights

Approaches: Interviews, day in a life, shadowing, journey mapping etc.

Feedback Survey

Low volume, uncovers complaints / blind spots

Tools: Pop up surveys (this deck), NPS etc.

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For key takeaways,
check out the rest of
the article below

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