

CHRIS DEALS WITH IT

episode notes




EP 68 - Survey Says

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 *AI Statement: All elements of this episode are products of the author, Chris Kreuter, made without any use of AI tools.*

We're inundated with data: Survey requests, analytics reports, low cost sensors, AI data mining, and much more. But there's a big difference between data and insight. This episode explores the processes and roles data plays in our lives, our organizations, and for our customers.

Today's episode has four focus areas

1. Active vs. Passive Data
2. Utilizing Data
3. Hidden Information
4. Data's Limitations

1. Active vs. Passive Data

- I define Active Data as information gathered by actively engaging with a customer, product, or service.
 - Examples include: Prompting a user to provide feedback in a website pop-up, e-mailing a survey form, the happy/sad buttons in public restrooms, opinion polling on a street corner, and manual logging of interaction information by an employee.
 - This type of data collection is an interruption to the customer: A request for their time, possibly in addition to what they have already invested in a product or service.
 - We must be mindful of the approach we take in soliciting this feedback:
 - Are we hounding them with multiple e-mails, such as reminders to leave feedback? I know I personally get annoyed by this practice.
 - Are we tracking how many requests actually result in useable feedback?
 - Has there been enough time/experience with the material we're asking them for review? (For example: Asking someone if they liked my book a day after they purchased it.)
 - What is the expected bandwidth of our customers?
 - Are we asking busy customers to fill out a 10 minute e-mail survey after a one-time experience in our store?
 - Or are we setting up a feedback session with a customer partner we've worked with for years?
 - How personable is your request for that feedback?
 - Who is parsing this info? The employee who directly sold to them or provided a service, or a third party marketing research firm well after the fact?
- Meanwhile, Passive Data is information that requires no direct action or interruptions of your customers or processes.

- Examples include: Software usage data, automated bug reporting, data gathered by passive sensors and/or cameras, and gathering customer data at point of sale.
- I also define this for things where customers go out of their way to provide data: Such as Google reviews, website feedback forms, or unsponsored media posts.
- There's some risk of decoupling data gathered passively from our customers' reality: Since we have only our view, not their personal opinion.
- The availability of active and passive data sources is highly dependent on the products and/or services being offered.

2. Utilizing Data

- With all this data, we need to be mindful of some key factors:
 - Sensitive data - Credit card information, social security numbers, passwords, etc... Understand laws governing it's storage. How risky is sorting the data your collecting?
 - Proprietary data - How central is the information to your company's success? What would happen if the data ended up in the hands of your competitor?
 - Qualitative vs Quantitative
 - Qualitative data can be tricky, opinion based assessments that can be difficult to codify.
 - Quantitative data is an actual metric based off something measurable
- Having a clear, useable data structure is vital for success
- Focus on maximizing the benefits to the end users and/or customers who will benefit most from the insights gained.
 - Consult with them on what would help their aspect of the business, or improving their experience with your products or services.
 - Consider the impact of data at all levels of the organization. "what gets measured gets managed"

- Who owns the results of the data analyzed? Will their reviews, compensation, success or failure be measured with the data?
 - If so: Better be confident in the quality of the data and put in steps to regularly review its efficacy.
- For those gathering the data, try to avoid double work/entry wherever possible.
 - If you make it onerous to gather data, you might get inconsistent results, especially during busy periods.
 - Is the data embedded in your processes? Can it slow or hinder your staff's ability to get their core job functions completed?
- You may believe analytics tools require expensive software and solutions - but there are some amazing sources out there, with many tools democratizing analytic. There are some great no-to-low-code solutions to help gather & connect data, and product useful reports.
 - Microsoft PowerBI
 - Tableau (owned by SalesForce)
 - Airtable
 - Google Data Studio
 - SQL Database Managers
 - Even Notion is getting into the data reporting game

3. Hidden Information

- Are there sources of data within your existing tools that can enhance your business intelligence?
 - A retail store may have a bell device at the front door to alert staff when people come & go. These devices can often be sources of data on number of people coming & going, with timestamps you can use to measure foot traffic by time of day & day of week. You could further tie this into sales data for the time period to find correlations (i.e.: people buy more often and in large amounts when the store is less busy)

- Explore other methods to utilize of data you already have:
 - For example: You may be keeping track of regular customers using your POS system, but are you reviewing this data to gauge engagement with these repeat customers? How often are they shopping? What's trending from their purchases? Are there discernable patterns that can be found in that data?
- Many organizations have multiple, disconnected systems for various functions.
 - It may be possible to pull data from these various systems and connect these data sets for further insight.
 - These linkages are called data keys - And can be valuable tools for enhanced analytics!
 - You can connect these data sets into *schemas* - using these data keys
 - For example: You may have a CRM or pipeline system for customer management, but another one for managing customer orders & deliveries. A customer account number would likely be the data key that connects the data from these two systems. This would allow you to create combined reports showing customer metrics alongside sales and delivery history, a one-stop overview of a customer!
- Be wary of data sources from online tools like reviews.
 - Many of these can actually be bots.
 - Listening to this data too much can skew results, or hide more realistic, actionable data.
 - Or to put it another way: Are you measuring the right metrics that have the potential to provide a better customer experience?
 - One example would be from this podcast's very own analytics.
 - Going off of reviews I find online only provides a few touchpoints on people's opinions. People who took extra time, going out of their way to provide feedback.

- It's possible some of those are bots, but regardless: The total # of review is a very small subset of my listeners on any given episode.
- More relevant to me is data on how long customers are engaged with an episode. If people are tuning out within the first minute, it could signal my content isn't engaging enough.
- Thank you for listening this long 😊

4. Data's Limitations

- For all this talk about data, it has its limitations.

Data can't run your business, nor should it.

- Consider the analytic skillset of those receiving this information: Are you providing too much detail? Not enough?
 - Reports can focus on first level data, which might be enough for certain staff or functions
 - But provide opportunities to click further into results, to gain second & even third level insights.
- It's important to be clear on the vectors to action that your data will have on your organization.
 - Your marketing team and sales teams are both focused on growing the business, but they may need to utilize the data in different ways.
 - Marketing is creating buzz around the product, while sales is working to covert that buzz into paying customers.
 - These could utilize similar data sets - but the stories they tell from that data will often differ.
 - This kind of storytelling is critical: Humans are not data - we're emotional, rational beings that buy through a combination of trust, relationship, and stories.
 - **How will you drive human action with data?**

Episode 68 Quote:

Today's quote comes from Kaliene Bradley's wonderful debut novel, [The Ministry of Time](#)

"Ideas are frictional, fractional entities, which wilt when pinned to flow charts. Ideas have to cause problems before they cause solutions"