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# Getting to Know Your Users Better: The Trade Show Survey

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# What I'll be talking about

## - our survey journey

- This presentation will:
  - Share how we surveyed users at trade shows last year and gained key insights into how NetApp users like to consume technical information.
  - Describe how we got users to seek us out & talk to us.
  - Explain our key findings about how NetApp users like to consume technical information.
  - Describe what we did with the information when we got back to the office.
- What you can expect to learn:
  - Gathering information from users in a trade-show setting can be done efficiently and cheaply.
  - Web-based survey tools are easy to use and provide low-cost metrics.
  - Information can be shared with upper management to improve the profile of the technical documentation team and improve the quality of your doc products.



# Why it matters

## - the Big Ideas

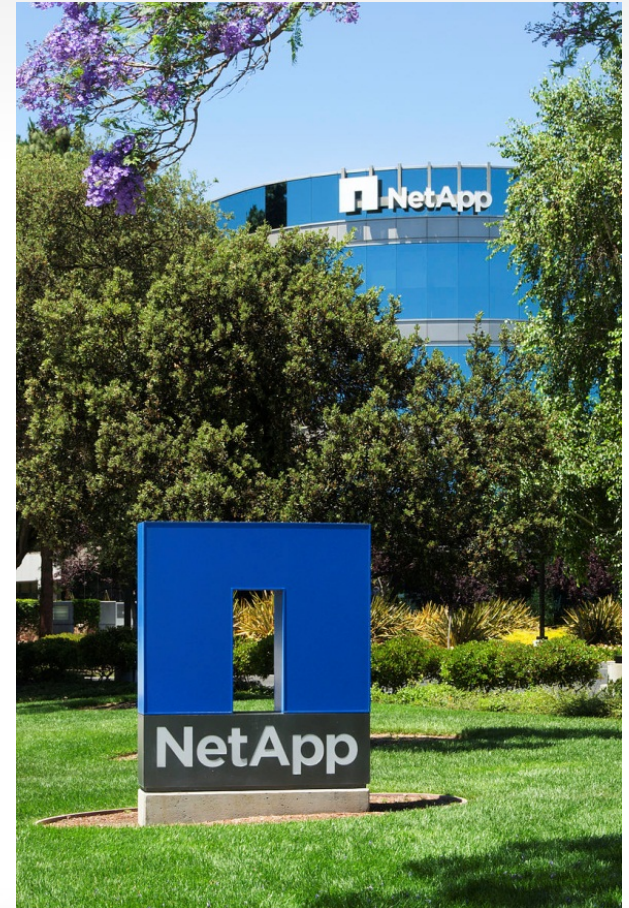
- You can use the opportunity afforded by your company trade show participation to do two great things:
  1. Gain a better understanding about doc users.
  2. Demonstrate documentation value to execs.
- Surveys are part of a coordinated metrics strategy portfolio:
  - surveys: user identities and preferences
  - web traffic: objective documentation access
  - interviews: rationale & goals for documentation usage
  - heuristic evaluation: expert review of UIs & content
  - observation: user behavior with content, usability studies
  - publication system metrics: content development and maintenance
- Communication is essential to a metrics strategy.



# A bit about NetApp Information Engineering (IE)

“Informed by our deep knowledge of products and customers, we drive NetApp’s integrated content strategy to accelerate adoption of the data fabric.”

- Globalization and technical publications (IE) department within Product Operations
  - B2B product documentation for storage and data management products (HW & SW)
  - Content consumers are IT professionals
- About 45 FTE and 30 contractors at 5+ sites
- IE Infrastructure:
  - Tools, including CMS & DITA architecture
  - Production
  - Editorial
  - Architecture, aligning end-user needs with tech pubs deliverables



# NetApp tech pubs at the Insight trade show

- “NetApp Insight is NetApp’s annual technical conference for storage and data management professionals. It gives customers, engineers, consultants and partners a forum for learning from industry experts and each other.”
- Currently held in Las Vegas and Berlin.
- NetApp tech pubs has had a booth and conducted surveys since 2011.
  - First surveys were paper on clipboards and magnets on whiteboards – yikes!
  - Started tablet surveys in 2013, standardized in 2014.
  - Got the idea for tablet surveys from another booth in our neighborhood!



# How we structured the survey (1/4)

## - tools

- Disclaimer – we are survey amateurs! But ...
  - We all have regular exposure to surveys.
  - Contemporary tools are terrific, anybody can do this!
- Currently using SurveyGizmo
  - Lots of tools and support
  - Easy to localize – we provided 10 language options
- Data collection methods
  - Radio and multiple choice buttons -- ~90%
  - Text entry fields -- ~10%
- Branching logic
  - Branches allow collection of further detail
  - Examples: job role, specifics of likes/dislikes



# How we structured the survey (2/4)

## - Categories

- Demographic information, 5 questions – for example:
  - What is your relationship to NetApp?
  - What is your job function? (Select all that apply)
- Documentation usage, 11 questions – for example:
  - In the left column, choose which format you prefer for the NetApp technical information you use. (Choose only one option.) In the right column, select the best reason why you prefer to use that format. (Choose only one option.)
  - How do you rate NetApp's documentation overall?
- Personal information, 5 questions - for example:
  - Would you like to be entered into the drawing for the GoPro camera or phone charger?
  - Would you be willing to participate in an in-depth interview about NetApp documentation? We expect it will only take about 15 minutes, and can be done by phone or email if you prefer.
  - What's your email address? (Don't worry: No spam from us!)

# How we structured the survey (3/4)

- sample edit screen

The screenshot displays a survey editor interface with a blue header bar. The header contains navigation icons and text: 'Add Page', 'Insert from Library', 'Skip/Disqualify Logic', and 'Merge Pages'. Below the header, the page is titled 'Page 13: (untitled)'. On the right side of the page, there are icons for 'Preview', a pencil (Edit), a plus sign (Add), a copy icon, and a close icon (X).

The main content area features a question: 'When do you access NetApp documentation? (Select all that apply) \*'. The question is enclosed in a dashed blue border. To the right of the question, there is a vertical toolbar with icons for 'Edit', 'Move', 'Copy', and 'Remove'.

The question has two columns of options, each with a checkbox:

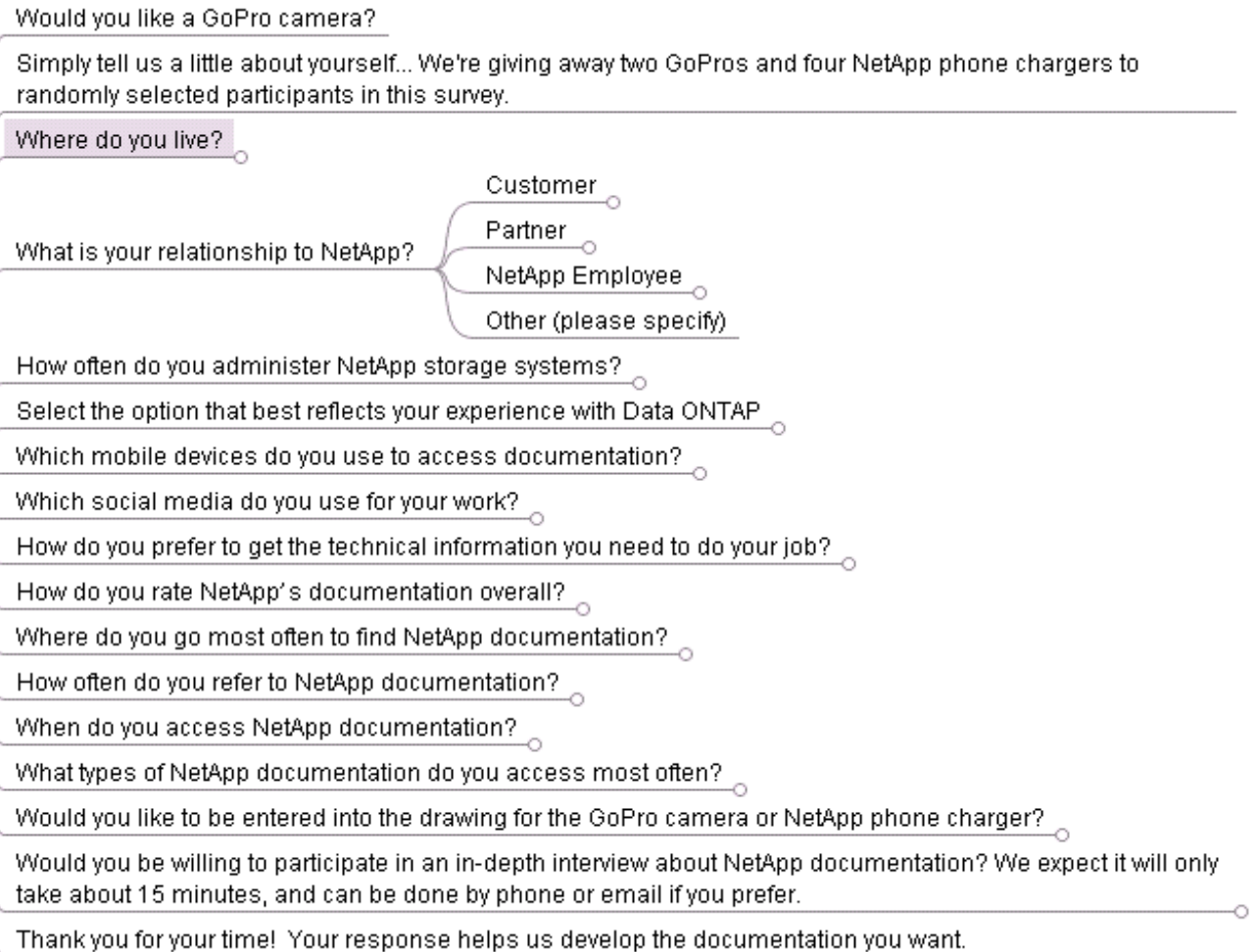
- Planning
- Installing
- Configuring
- Troubleshooting
- Upgrading
- Determining compatibility
- Learning about NetApp products (pre-sales)
- Learning about NetApp products (post-sales)
- Researching best practices
- All of the above
- Other (please specify) [input field]

At the bottom of the question area, there is a dashed box containing the text: 'Add New: Question | Text/Media | Action'.



# How we structured the survey (4/4)

## - documentation survey questions



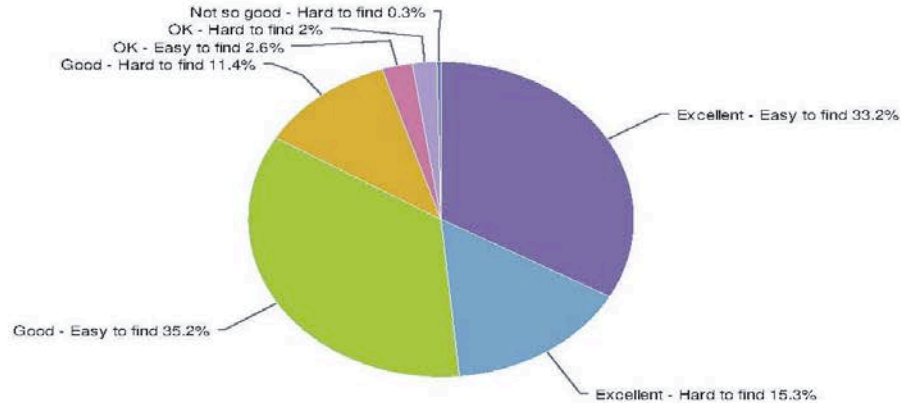
# How we administered the survey

- Surveys loaded onto tablets – Amazon Fire (\$50!) and iPad minis
- Solicited passers-by
  - Incentive: GoPro cameras grand prizes, misc. swag as second prizes
  - Survey participation up between 2014 and 2015, incentives seem to work!  
“The average response rate for non-incentivized review requests is around 0.1%, which means for every review you read on Amazon there’s around 999 customers who haven’t left a review” – <https://www.ventureharbour.com>
- Also passed out information cards and Tweeted!
- Surveys took on average 4 minutes to complete
  - If a survey taker wants to chat, about the survey questions or anything else, we’re all ears!

# How we viewed survey results

- canned displays, spreadsheets also available

12. How do you rate NetApp's documentation overall?



Excellent - Easy to find	33.2%		195
Excellent - Hard to find	15.3%		90
Good - Easy to find	35.2%		207
Good - Hard to find	11.4%		67
OK - Easy to find	2.6%		15
OK - Hard to find	2.0%		12
Not so good - Easy to find	0.0%		0
Not so good - Hard to find	0.3%		2
Total			588

# How we collated and analyzed survey results

- 2011-2014
  - Curiosity factor – “how the heck about that?!” – gradually gives way – TBU?\*
  - Validation of efforts – are we on the right track ...
    - With specific initiatives? Examples:
      - New documentation type: Express Guides
      - Documentation findability
    - In general? Example:
      - “How do you rate our doc overall?”
- 2015
  - Further validation of efforts
  - Increased attention on results that ..
    - are **actionable**
    - we would **communicate**
  - Note: the converse will soon be of interest ...



\* True But Useless

# How we communicated survey results

- 2011-14
  - Limited sharing within the department
    - Department blog, brown bag gatherings
  - Limited sharing up the management chain
- 2015
  - We had a new communications plan
  - Immediately communicated with content stakeholders
    - Presentations to peer content organizations
    - Presentations to execs



## Insight 2015 Briefing

by Ingrid Hart

We delivered the first companywide Insight 2015 Briefing to showcase responses from 588 people and to reveal our innovation roadmap. We nailed the right points and materialized much needed and significant Innovation in IE. This is an excellent use of customer feedback into action. The attendance was impressive. We saw names from Marketing, Support Site, Customer Listening Program, and from across Product Ops. The questions were so on point, YES, we are leading the content strategy!

# Why IE Attends Insight

“Informed by our **deep knowledge of products and customers**, we drive NetApp’s integrated content strategy to accelerate adoption of the data fabric.”





# Insight 2015 survey responses

# Welcome to My World (1 of 3)

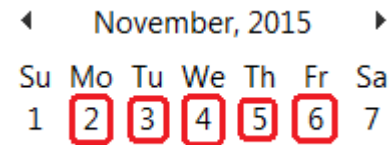
I'm a NetApp user!

- **My job function**



68%

- I work with NetApp products



50% said "every day"

- I have experience with Data ONTAP



**7-Mode**

67%



**Cluster Mode**

- I prefer this type of documentation



71%



# Welcome to My World (2 of 3)

I'm a NetApp user!

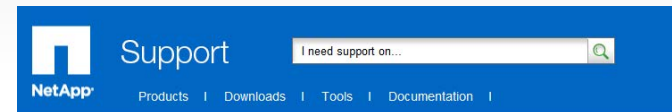
- My mobile device of choice



- My favorite documentation format

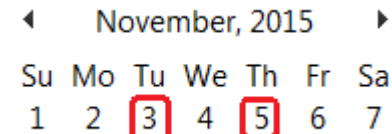


- Where I look for documentation



73%

- How often I consult the documentation



53% said "multiple times per week"

# Welcome to My World (3 of 3)

I'm a NetApp user!

- How I rate NetApp documentation

47%

Good!

48%

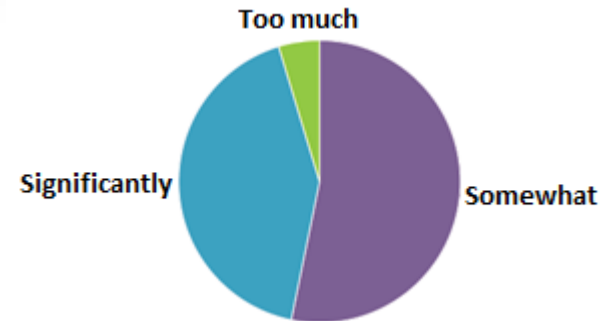
Excellent!

- What I'm doing when I access NetApp documentation***

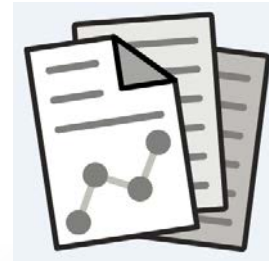


Configuring (81%)  
Troubleshooting (74%)  
Upgrading (69%)  
Installing (69%)

- How challenged I am to find information



- The most useful kinds of documentation



Config Guides (75%)  
Admin Guides (74%)  
Tech Reports (63%)

# What's changed this year (1/3)

- Big change for NetApp tech pubs: web traffic metrics
  - Improved our collection and analysis methodology
  - We'll soon have per-topic customer sat responses
  - No longer rely on Insight surveys for doc usage specifics
  - We're removing queries that duplicate web traffic metrics
- Nonetheless, we coordinate metrics strategies
  - Example: PDF usage
  - We'd like to deemphasize PDF in our offerings, but ...
  - Survey results: 86% prefer PDF
  - Web analytics: PDF download numbers strong for all products
  - Takeaways:
    - Continue offering PDF
    - Learn more about customer usage



# What's changed this year (2/3)

- This means we'll renew our focus on users
  - Who are our users and what's important to them?
  - Info we can't get from web traffic analysis
- Additional benefit: make tech pubs look good to execs
  - How does tech pubs provide value to the company business?
  - Ensuring an appropriate level of investment
  - “What have you done for me lately?” We'll tell you!
- Additional benefit: better survey UX
  - Shorter *leaner* survey, lower “fatigue factor”
  - Booth staff have more time with visitors

# What's changed this year (3/3)

- Questions removed – examples:
  - “What is the most useful kind of documentation for you to access?”
    - This is where we list individual guide types; we’re now getting metrics on individual guide usage from the web analytics initiative.
  - “How much do the challenges of actually finding documentation affect your work?”
    - We already know search is an issue.
  - “How important is localization (translation) of documents to you? (German, Japanese, Chinese, etc.)”
    - Business case has changed, globalization is now well funded.
    - Query less relevant to specific audience.
- Questions added – example:
  - “How much is product documentation worth to you relative to the overall product cost?”
    - Further information on overall doc value to users, in monetary terms.
    - Inspired by CIDM Online Metrics Conference 2016!

# “Revised” survey goals

- our next steps after this year's Insight event

- Learn about customer content *needs* and documentation preferences using queries not available in tech pubs traffic metrics.
- Demonstrate value of tech pubs products to NetApp business.
- Prefer queries with potentially actionable results.
- Compare Insight survey results year over year.
- Simplify the survey to allow more techpubs/customer interaction time at the Insight trade show booth.
- Solicit specific comments and post-Insight follow-up contacts.
- Related goal: Explore the possibility of making a related survey available outside Insight times.

# Takeaways

- self-exhortation, might be relevant to you too!

- Keep asking the question: Is this survey helping us achieve business goals?
- If yes, what's the proper level of investment? Assess ROI.
- Keep tuning the survey based on ROI – keep the process *lean!* ;\*)
- Do something with the data!
- Align the survey with department metrics initiatives
  - **communication** is an essential part of any metrics initiative
- Educate yourself about data gathering.
- Enjoy the journey!





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# Thank you!

Questions and discussion