

# Feature Prioritization: Why I stopped sending surveys and started talking to customers

Amanda Nance, Sr. UX Researcher

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## In a nutshell...

- **Structured focus group method** for getting feature priorities
- Easy to implement **quickly**
- Easier to implement **correctly** compared with a survey
- More valid than a survey

### Why?

- Haven't seen presentations on this approach

# How did this come about?

- **UI refresh** of a mature product
  - **Previous research** available
  - **Internal disagreement** on feature priorities
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# What does this method accomplish?

- Understand **feature importance**
- Understand **why** features are important
- Help you **prioritize** along with other inputs

# Aren't surveys great for feature prioritization?

- Large **sample size**
- Analyze **by segment**
- Seems like a **fast method**/turnaround
- Stakeholders **love surveys**

# Problems with surveys for feature prioritization

Surveys rolled out too quickly are a great way to get terrible data.

- Need time to **validate wording**
  - Features may require **too much explanation** for a survey
  - Customers can't ask **clarifying questions**
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# Overview of approach

- **Best aspects of a focus group... without the group think**
- Structured focus groups
  - Ideally, **4 to 6 customers** per group
  - Key questions are **predetermined & close-ended** (structured)
  - Customers answer key questions **independently**
  - Opportunity for **group discussion**



# What preparation is required?

- **Set up key questions** in a survey tool
- **Create materials** to show the feature concepts
- **Set up a remote meeting tool**

# Facilitating the Group

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# Welcome and getting started

- Welcome & call agenda
- Customer introductions
  - Include on-screen prompts
- Ask customers to open the survey
  - Explain its purpose
  - Have them answer demographic questions

# Show an overview of the features

- **The order in which you present features** can impact responses
  - \*Anchoring and ordering effects
- **Give an overview of the features**
  - Show **complete list** of features
  - **Summaries only**
  - **Level set:** Helps customers understand what features are “competing”
- **Vary the order** of the features across groups
  - (Tools can make this tricky)


\*See: “How Anchoring, Ordering, Framing, and Loss Aversion Affect Decision Making” by Colleen Roller on [www.uxmatters.com](http://www.uxmatters.com)

# Describe a single feature

- Show a **slide for each feature**
  - Include a description of the feature
  - Include a mock up if possible
  - Mention if the mock ups are conceptual
- Read a **detailed description verbatim**

## Typeahead search box

The search bar at the top is a “typeahead” -- it offers suggestions as you type.



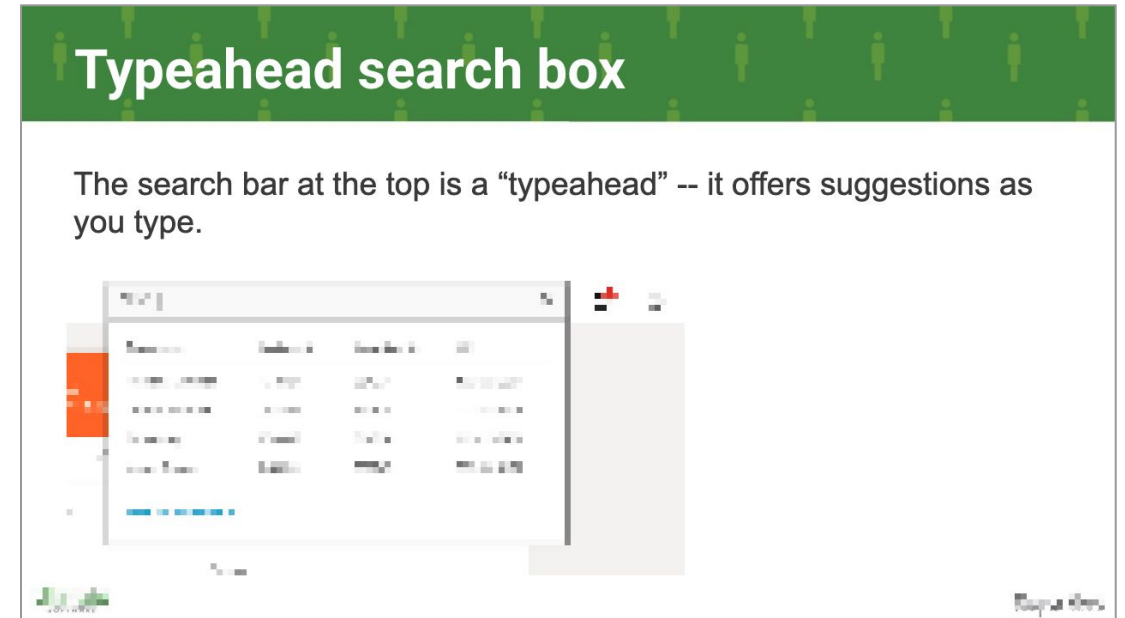
The screenshot shows a search bar with the text "Type" entered. Below the search bar, a dropdown menu displays suggestions for "Type" in a table format. The table has four columns: "Name", "Address", "City", and "State". The suggestions are:

Name	Address	City	State
1234 Main St	1234 Main St	Anytown	CA
5678 Elm St	5678 Elm St	Anytown	CA
9012 Oak St	9012 Oak St	Anytown	CA
3456 Pine St	3456 Pine St	Anytown	CA

At the bottom of the dropdown menu, there is a link that says "View all results".

# Detailed feature descriptions should be...

- **Concise (3-5 sentences)**
- **Neutral**
  - Say what it does
  - Consider an example of how the feature can be used
  - Do not suggest the impact of the feature!
- **Iterative**
  - Rewrite the descriptions for the next group



# Guidelines for detailed feature descriptions

## Leading example

“This feature allows you to search by Employee Number. **This helps you more quickly access an employee’s profile.**”


assumed impact is leading



## Better example

“This feature allows you to search by Employee Number.”

stick to the facts



**The key:**  
Get independent  
responses first

*So you've described the feature...*

- Ask for clarifying questions
- Ask customers to **withhold their opinions for the moment**
- Direct customers to **answer a survey question** about feature importance



# The key question I use

- “How important is each feature for you?”
  - Critical
  - Important
  - Nice to have
  - Don't need

8. How important is each feature for you?

	Critical	Important	Nice to have	Don't need
Feature 1	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Feature 2	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Feature 3	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

# Begin group discussion for the feature

- Ask customers **not to change** their survey answers
  - Ask each to **share their answer** and **the reason**
-

# Group discussion for the feature

## Call on customers by name

- Prevents people from **talking over each other**
- Identifies speakers for **note-taking & analysis**

Search by Employee Number notes

Questions asked about feature: none

Participant	Importance rating (optional to capture)	Reason
[Redacted]	Don't need	[Redacted]
[Redacted]	Important	[Redacted]
[Redacted]	Nice to have	[Redacted]
[Redacted]	Critical	[Redacted]

# Rinse and repeat

- Use **same format** for other features
- Optional: Get a **ranking** in your collection tool
  - Do this after all features discussed
  - Ranking can be used to break ties
  - I don't usually use the rankings

# Run multiple groups

- I run **2-3 groups** per project
- Need enough participants to **see trends**
  - Guideline: **12-15 participants** total

# Analyzing the Data

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# Now what? Analyzing the data

- Exploratory vs. predetermined analysis
- Ways to analyze
  - Count the “critical” votes
  - Weighting: Critical + important
- **Look at patterns, not just numbers**

7. How important is each feature for you?

	Critical	Important	Nice to have	Don't need	Responses
Count	2	3	8	0	13
Row %	15.4%	23.1%	61.5%	0.0%	
Count	6	3	4	0	13
Row %	46.2%	23.1%	30.8%	0.0%	
Count	3	3	4	3	13
Row %	23.1%	23.1%	30.8%	23.1%	
Total Responses					13

# Look at the mode

- Where are the most votes?
  - Feature A = **Nice to have**
  - Feature B = **Critical**
  - Feature C = **Unclear**

7. How important is each feature for you?

	Critical	Important	Nice to have	Don't need
Count	2	3	8	0
Row %	15.4%	23.1%	61.5%	0.0%
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Count	3	3	4	3
Row %	23.1%	23.1%	30.8%	23.1%
Total Responses				



# Look for polarizing features

- Feature C has both “don’t need” and “critical” responses
- **Why?**

7. How important is each feature for you?

	Critical	Important	Nice to have	Don't need	Responses
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Row %	23.1%	23.1%	30.8%	23.1%	
Total Responses					13

# The importance of “why”

- Advantage of a discussion vs. a survey
- You want the “why”
  - **See trends** - e.g., different segments want different features
  - Identify **alternative solutions**
  - Challenge **internal assumptions**

**How long does this take?**

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# How long does a session take?

No. of participants	Session length	Features discussed
1 customer	20 minutes	7
7 customers	<b>45 minutes</b>	7

Get **7x** the data in **~twice the amount of time**

# How long: Start to finish

Less than 2 weeks

- Recruiting through findings
- Session details
  - **3 sessions**
  - **13 participants**
  - **7 features** discussed

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# How long would 1:1 interviews have taken?

- An **extra 4-5 days** to:
  - Schedule
  - Run interviews
  - Analyze
- **Even longer if you want more participants**

# Wrapping Up

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# Pros and cons of this method

## Pros

- **Faster + scales better** than 1:1 interviews
- **Eliminates group think** of traditional focus groups
- Elicits **why features are desired**
- Easier to **see trends**
- **Stakeholders can listen in**; more persuasive than a survey?

## Cons

- The **sample size** is still small(er)
- Must find **meeting times** that work for most customers



# When should I use this method?

- You have **a few competing features** in mind
- You have **limited time**
- You want **directional feedback** on feature importance
- You're open to **challenging your assumptions**
  
- *Note on “Bonus material”*

**Questions?**

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# **Bonus Material**

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# **1. Tools for Data Collection**

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# Tools for customer input

1. Survey tool (e.g., Alchemer, SurveyMonkey)
2. Card sorting tool

# Survey tool

- Q<sub>1</sub> = Importance per feature
- Q<sub>2</sub> = Ranking (optional)

8. How important is each feature for you?

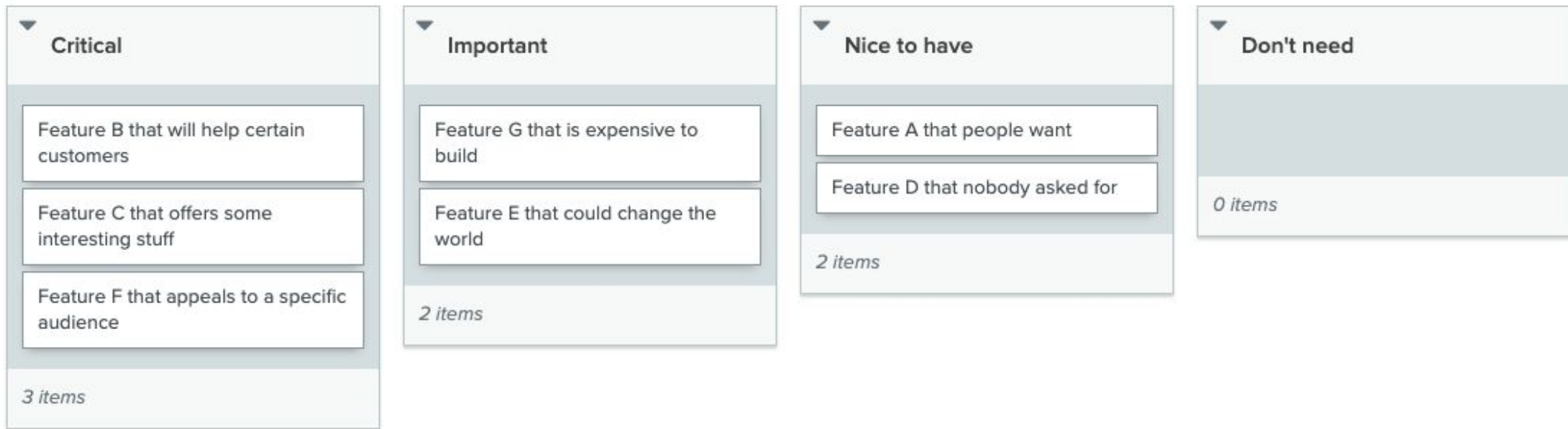
	Critical	Important	Nice to have	Don't need
[Blurred feature name]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Blurred feature name]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
[Blurred feature name]	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

11. Please place these Customization options in priority order. \*

Drag items from the left-hand list into the right-hand list to order them.

# Cart sort tool

- Set up each *level of importance* as a category
- Ranking = top to bottom within a group



Optimal Sort: Rank by drag and drop

# Card sort vs. survey tool

## Card sorting tools

- Good for **large set of features**
- **Compare features** more easily
- The **ranking process** is seamless
- **Randomizing** items is easy

## Survey tools

- Easier to **analyze results** (more flexible reporting)
- Can filter by **customer segments**
- **Ordering items differently** for different focus groups is a manual effort



## **2. Miscellaneous Tips**

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# Alternatives to the “importance” question

- I’ve tried Kano model
- Observed several issues with it
  - Doesn’t match how customers think
  - Can confuse customers
  - The Kano wording hasn’t been validated (to my knowledge)
  - Analysis is more complex

# Do different + surprises

- **How have I altered my approach over time?**
  - Now I change the order that I call on people (let every participant go first)
- **What has surprised me?**
  - One participant gave their opinion during the “clarifying questions only” section, despite all warnings
  - How easy it is to hear trends on a group call

# Did customers like this format?

- Seemed **engaged**, high participation
- Liked **having input** into product decisions
- Probably **more enjoyable than a survey**
- Having a conversation with us makes them **feel heard**

# Customers who bring multiple participants

- I want one response per company (account)
  - But... I have participants who bring a colleague to the call
- Prior to the call, I ask them to work out a collaboration method
  - They need a way to collaborate outside of the group call so they don't influence others

# Conferencing tool considerations

- Consider both: live experience + recording flexibility
- Needed features
  - **Screen + camera** share
  - Speaker identification
  - Transcription
- Nice-to-have features
  - Hide attendee list
  - Disable chat
  - Observers can join silently
  - Easy to share recording with stakeholders