QuestionPro Training and Consultation Support

Virginia Tech DCSS Spring 2022

Dr. Nathaniel D. Porter, Assistant Professor
University Libraries & Sociology
Social Science Data Consultant & Data Education Coordinator

VIRGINIA TECH

Overview

- QuestionPro as a case study of transition support
- Support need assessment tools
- User personas
- Stakeholders
- Support process
- Challenges and lessons learned
- Current support and training options

Why a case study?

- Decentralized stakeholders/support
- Diverse users and needs
- Challenges of ending/staring/moving
- Interconnection with grants, human subjects, etc
- Role of feelings
- Ideal scope for study (extensive but manageable)

Tools to help assess support needs

- Landscape survey (not that kind)
  - Who are current stakeholders?
  - Who are current users?
  - What are known technical challenges/barriers/needs?
  - How would you find out about other needs?
  - How are people likely to react to changes?

- User personas
  - Construct fleshed out personas of common or potential users of existing or new tool ([samples](#))
  - Intentionally add important edge cases (support everyone)
  - Every persona tells you more about what to be ready for

- Skill acquisition
  - Novice - Competent Practitioner - Expert ([Benner/Dreyfus model](#))
  - Varies by skill component
  - Affects not only direct knowledge but ability to problem solve

VT Survey Software User Personas

- Research
- Administration
- Casual Users

BUT this is not enough detail to recognize range of needs!

VT Survey Software User Personas

- Research
  - Recruiter (large surveys, uses panel or other recruitment tools)
  - Experimentalist (manipulates questions/order/etc within surveys experimentally)
  - Logician (relies heavily on design features to optimize surveys)
  - Resurveyor (repeatedly surveys the same people)
  - Improvisor (tests the limits of features using custom HTML/JavaScript/etc.)
  - Manager (oversees a lab with multiple investigators running related surveys)
- Administration
  - One-offer (needs quick answer to a few questions, relies on built-in reports, etc.)
  - Tracker (tracks change in responses over time)
  - Formalist (uses surveys to collect data for academic or event administration)
- Casual Users
  - Teacher (integrates survey data collection in coursework)
  - Explorer (considering whether to collect a survey or whether to use a specific tool)
  - Accessibler (relies on accessibility features for self or survey participants)
  - Emeritus (no longer actively collecting data, but may need to keep/share/archive it)

Stakeholders

- Users and Supervisors
- Central IT
- College/Departmental IT
- PDN and PD trainers in other groups
- Consultants (SAIG, UL Data Services, etc.)
- Affected adjacent groups (HRPP/IRB, UL Archives, ATS, etc.)

Training and Transition Support

- Communication early and often with stakeholders and users:
  - What is happening and when?
  - What do I need to do and when?
  - Should I freak out?
  - How can I get help with my specific need?
- Ongoing survey design/implementation consultation (DS)
- Early testing of QuestionPro based on common use cases from consultations
- Live/recorded webinars and trainings (QuestionPro)
- Self-paced training (QuestionPro certification and VT-PDN via DS)
  - Includes tutorial, reference and opportunities for interaction/feedback
- Additional consultation time for transition and archiving support
- Coordination between IT, DS, and QuestionPro to route/address needs
- Participation in QuestionPro Academic Advisory Panel (NP)

Challenges

- Anxiety (see right)
- Uncertainty
- Limits to import tools
- Changes to advanced features
  - Logic, JavaScript, etc.
- Differences in report/output format
- Mid-transition upgrades to QPro
  - Panel, logic, sharing, etc.
- Archival/preservation needs for both current and past users (including legal/grant requirements)
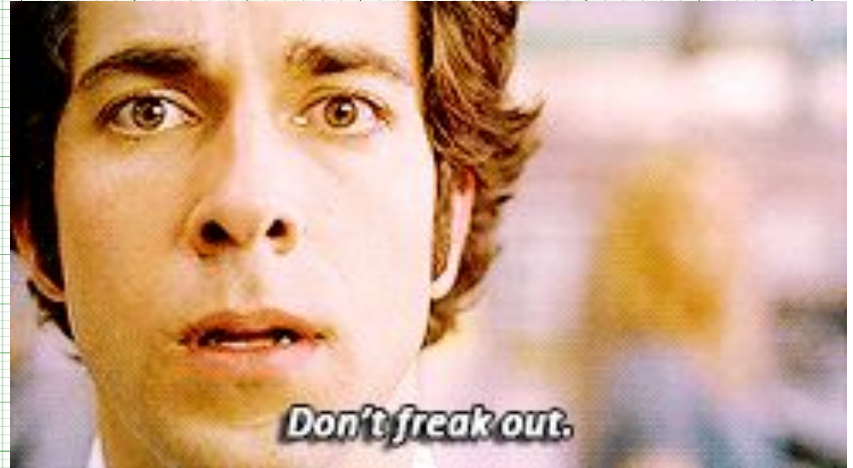
Don't freak out.

Challenge-specific Lessons Learned

- Anxiety - people need reasons to emotionally trust your "Don't freak out."
- Uncertainty - early, clear answers to common concerns reduce anxiety
- Limits to import tools - scaffold known issues w/ communication & support
- Changes to advanced features
  - Scaffold where you can
  - Be prepared to support a handful of more challenging use cases
  - Ongoing subscription and self-redevelopment of tools may both be nonstarters
- Differences in report/output format - communicate and be available
- Mid-transition upgrades to QPro - track, communicate, be available, use flexible training (like adding pages to Canvas course)
- Archival/preservation needs - streamline processes to minimize effort for low-reward but important needs

Overall lessons learned

- Develop ongoing connections and trust before things happen
- Plan for edge cases on all edges
- Train your team to train others (but lean on outside resources when you can)
- Always leave users feeling like they know how to get the right help
- Cross-promote support and services
- Leverage power in transition period to ensure maximum support/value with minimal need from us
- Communicate
- Anticipate
- Affective needs and learning are critical to our support/IT mission

Helping our Users Now

- Information
  - [License information and recorded webinars](#)
  - [FAQ from HRPP](#)
  - [QuestionPro online help](#) (includes certification courses)
  - [Self-paced PDN QuestionPro training](#)
- Assistance
  - 24-hour support from QuestionPro (edu@questionpro.com)
  - 1:1 [survey/Qualtrics/QuestionPro consultations](#) (DS)
  - [Statistical survey design and analysis assistance](#) (SAIG)
  - Data and survey assistance (including archiving) (dataservices@vt.edu)
  - Feature requests/inquiries and live training requests (ndporter@vt.edu)

Acknowledgements

- Everyone who has been part of support/transition
- Erin Collins (VT M.A. Student in Biochemistry) who designed the Canvas curriculum and Data Bridge (through whom she works)
- Daniel Chen (recent VT PhD) author of Data Science for the Biomedical Sciences, linked on user personas
- The Carpentries for useful modules on skill acquisition and learner personas in computational training