Serving the customer better by understanding their top tasks

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Abstract   The biggest influence on the customer experience, particularly in digital, is the experience customers have as they seek to complete their top tasks. Digital tends to be a very functional, utilitarian environment. Even in social spaces, people are very active. People may not mind wasting time on Facebook with their friends. However, Facebook would not survive long if people felt they were wasting time uploading pictures or trying to figure out how to tag those pictures. Time is a brutal determiner of success, and digital leaders measure customer time in milliseconds, not seconds. Digital is an explosion of possibilities — an almost unlimited world of content and tools. Yet, what truly matters to people when making a decision remains very small and concise. 'Top tasks' are those things that matter most to someone when they are deciding to buy a car, choose a university, or select another product or service. By contrast, 'tiny tasks' are those kinds of organisation-centric tasks that explode with content, often severely disrupting customers' top tasks journey. Thus, an important step in delivering excellent customer experience is to remove or mitigate the influence of tiny tasks. This paper aims to explain how the Top Tasks methods work and how you can apply them to develop a better understanding of what matters most to your customers.

KEYWORDS: customer experience, user experience, digital strategy

INTRODUCTION

It has never been more important to understand what matters most to customers. Trust is at a premium and people are sceptical, indeed, often cynical towards brands and organisations. When they visit a website or app and do not see what they want immediately, their first impulse is to hit the back button. Impatience rules.

At the same time, there is an explosion of content and choice. The world is drowning in information. How does a company stand out? How should it connect with its customers? One option is to pursue the traditional model of marketing and advertising and become one more screaming voice vying for attention. An alternative approach is to start paying attention. Indeed, while traditional marketing has been largely about *getting* attention, effective digital marketing is more about *paying* attention.

It is not about inventing and designing customer journeys. What is important is discovering and supporting the journeys that customers are already on. Out there in the digital-land, there are customer-beaten paths. There are common ways people think about certain problems or tasks. There are

common ways they will try and complete those tasks.

What do lean and agile design, minimally viable product, usability, user and customer experience have in common? They all put the customer at the centre. The customer becomes the co-designer, the teacher, the journey-maker and mapper.

It all begins with the customer task.

Digital is primarily a task-driven place — a 'do' environment. At the most basic level, it starts with a search. This is followed by scanning, selecting and clicking on links. Such behaviour is active, purposeful and self-directed.

One way to get found in digital is to invent your own words and catchphrases, design and develop your own journeys, and then market the hell out of them in order to get customers to search for those words and phrases, and learn to go on those journeys. The smart alternative is discover the words that already matter most to customers, discover the journeys that they are already on, and serve and support those customers in completing those journeys quickly and easily. This is what 'top tasks' refers to.

From the very beginning of digital design, it has been very obvious that what the typical organisation wants the customer to do on its website, and what the customer actually wants to do, are often very different things. Unless the customer's needs match the latest marketing campaign or strategic initiative or the organisation's grand vision of itself, then the customer will struggle to do what they came to do. However, without evidence of customer needs, designers are largely powerless to win arguments about creating simpler, more functional websites. Indeed, many organisations insist that they already know what their customers want and that the websites they are creating match those needs exactly.

This is where top tasks come in. Top tasks are about clear, compelling,

statistically-reliable evidence of what the customer wants (and does not want) to do.

DEVELOPING THE TASK LIST

The first step in understanding what is most important to customers is to develop a task list (task ecosystem) that describes the key things that matter in a specific environment, such as buying a car or choosing a university. There are a variety of sources for customer tasks, including:

- *Task-gathering preliminary survey:* This involves creating a simple, open-ended question asking customers what their top tasks are. It is run at the very beginning of the task collection process but generally used only when other sources are weak.
- *Corporate strategy:* Objectives, goals, mission statement.
- *Customer feedback, surveys, help:* Previous survey results, frequent help requests, etc.
- *Site behaviour analysis:* Site or app visitor data to understand the most popular sections.
- *Search analysis:* Top search terms on the website or app. Where appropriate, one can also analyse public web search behaviour on Google to identify search trends.
- *Competitor/peer websites:* A review of 4–6 competitor/peer websites/apps.
- *Traditional/social media:* What sorts of tasks are being mentioned by customers on social media? Do any specialist traditional media cover the focus area?

The initial task list may have several hundred tasks. The next step is to work with various stakeholders within the organisation to clean it up and reduce it to under 100 tasks. (At Customer Carewords, studies typically end up with 50–80 tasks.)

By way of illustration, tasks from a health survey might include the following:

- about the health service (management, objectives, strategies);

- accident prevention, safety;
- causes of condition/disease;
- check symptoms/signs;
- compare hospitals, clinics (services, success rates, quality of care);
- compare treatment options;
- confidentiality, privacy, data protection;
- description of a treatment/procedure;
- diagnosis of condition/disease; and
- donate or volunteer.

When simplifying and creating the final list, try to involve as many stakeholders as possible. The greater and broader the internal involvement, the greater the likely buy–in when results are delivered.

SURVEY DESIGN

Say, for example, you end up with 70 such tasks. The next step is to present all 70 tasks (yes, all 70!) in a single randomised list and ask customers to choose up to five of those tasks. Survey professionals will say that this cannot and will not work, and that it is utterly impossible madness. Time and time again, they insist, 'you can't give people 70 tasks and expect them to choose properly'. But facts and evidence are stubborn beasts. This method *does* work. It has been working for 15 years now, in more than 30 countries and languages, with 400,000 people voting in organisations such as Cisco, Toyota and Google. Figure 1 presents an extract of what such survey might look like.

There is a method to the madness. It is designed to overload. It is designed to avoid the opinion of the customer and dig deep into their gut instinct. It is designed to discover what truly matters, and — just as importantly — what really does not matter.

In dealing with health, what are the MOST IMPORTANT THINGS to you?

IMPORTANT: Select up to FIVE (5) of the boxes below. LEAVE ALL THE REST BLANK.

Please trust your first instincts and spend no more than 5 minutes on this exercise.

- ☐ Drug effectiveness, side effects, interactions, dosage
- ☐ Harmful habit reduction, quitting (smoking, alcohol, drugs)
- ☐ Risks/side effects associated with a lifestyle/behaviour
- ☐ Track and share lifestyle changes
- ☐ Treating minor health problems myself
- ☐ Find doctors/GPs
- ☐ Compare private and public medical services
- ☐ Prescriptions ordering, reordering
- ☐ Medical equipment (devices, gadgets, aids)
- ☐ Post-treatment recovery, rehabilitation
- ☐ Training, courses (antenatal classes, first aid, healthy eating)

Figure 1: A detail from a task list for health

TOP TASKS VERSUS TINY TASKS

Typically, for a survey with 100 tasks, the top four or five tasks get 25 per cent of the vote; the next 10–14 get the next 25 per cent; the next 20–30 get the next 25 per cent, and the remaining 50–60 get the bottom 25 per cent of the vote. In other words, the top five tasks get as much of the vote as the bottom 50. The chances of a task that is in the bottom 50 becoming a top task are almost zero.

After analysing separate sets of data in 2009, 2012 and 2017, the following patterns emerged:

- After about 50 voters, one can be reasonable confident that the task that has emerged as first in the vote will remain there. At the very least, it is highly unlikely that it will drop below the first three tasks. At this stage, the chances that the top tasks will fall off and become tiny tasks are very small.
- After about 80 customers, the top two tasks are known within two rank positions.
- After about 200 customers, the top two tasks are known and ranked in order.
- After about 300 customers, the top four tasks are known within two rank positions.
- After about 400 customers, the top three tasks are known and ranked in order. For most situations, 400 voters are enough to identify the top tasks.

The largest top tasks survey ever conducted by Customer Carewords was for the European Union. In total, 107,000 people voted in 24 separate language surveys that were combined together into one master survey. The top three tasks had emerged by
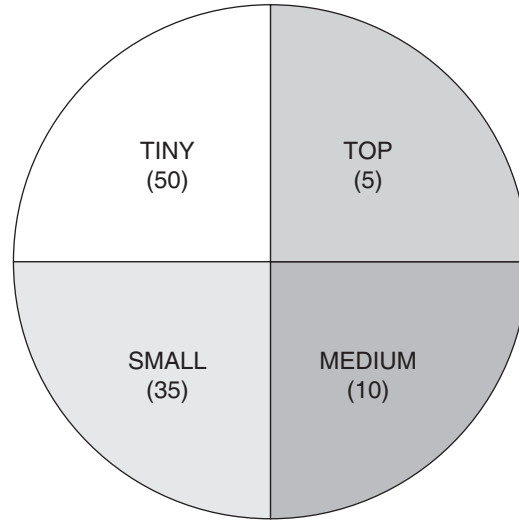

Figure 2: Example of how voting occurs

the first 30 voters. Yes — even after 107,000 people voted, the top three tasks were exactly the same as they had been after just 30 voters.

Figure 2, from a representative anonymous survey, illustrates the percentage of the vote for each task. The voting trend shows initial random variations and then settles down to a reasonably stable pattern.

In some surveys, a clear leader is established right from the start (Figure 3). This is what is known as a 'super task' (Figure 4).

The implication for a super task is that it should dominate the design. A hotel has a 'book a room' super task and an airline has a 'book a flight' super task. It is therefore surprising just how often organisations are not really aware of — or have certainly not prioritised — their customers' top and super tasks.

For each survey, Customer Carewords calculated the odds of the top task in the

Table 1: How quickly top tasks emerge

	No. voters			
Odds: 1 of	100	200	300	400
#1 ≤ #11	5 million	2.6 trillion	Infinite	Infinite
#5 ≤ #15	40	390	3200	540,000
#10 ≤ #20	8	18	40	84
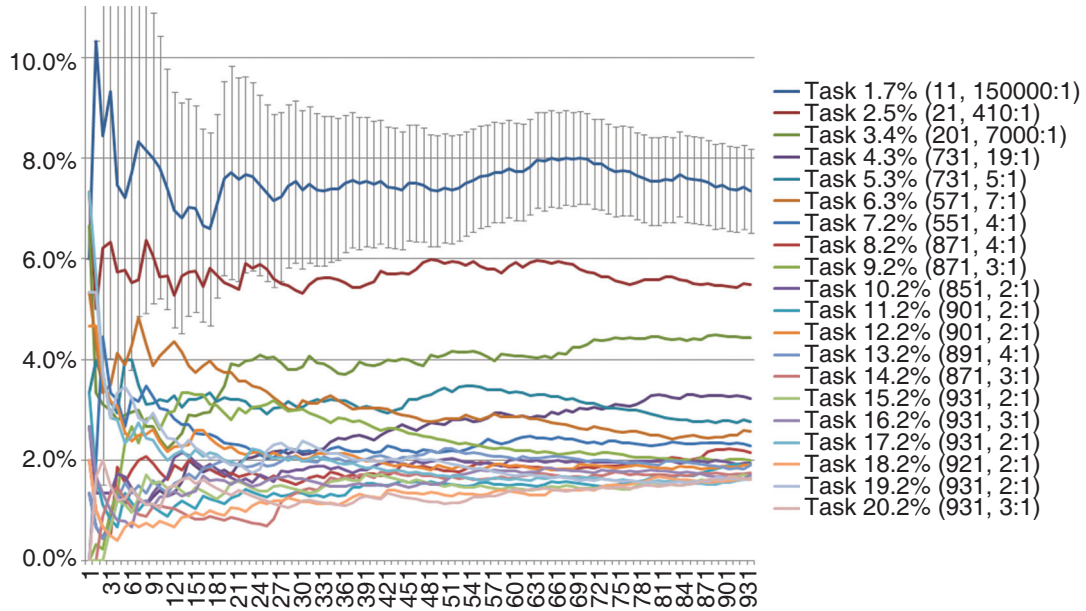
Figure 3: How task trends over a particular survey

Legend for Figure 3:
- Task 1.7% (11, 150000:1)
- Task 2.5% (21, 410:1)
- Task 3.4% (201, 7000:1)
- Task 4.3% (731, 19:1)
- Task 5.3% (731, 5:1)
- Task 6.3% (571, 7:1)
- Task 7.2% (551, 4:1)
- Task 8.2% (871, 4:1)
- Task 9.2% (871, 3:1)
- Task 10.2% (851, 2:1)
- Task 11.2% (901, 2:1)
- Task 12.2% (901, 2:1)
- Task 13.2% (891, 4:1)
- Task 14.2% (871, 3:1)
- Task 15.2% (931, 2:1)
- Task 16.2% (931, 3:1)
- Task 17.2% (931, 2:1)
- Task 18.2% (921, 2:1)
- Task 19.2% (931, 2:1)
- Task 20.2% (931, 3:1)
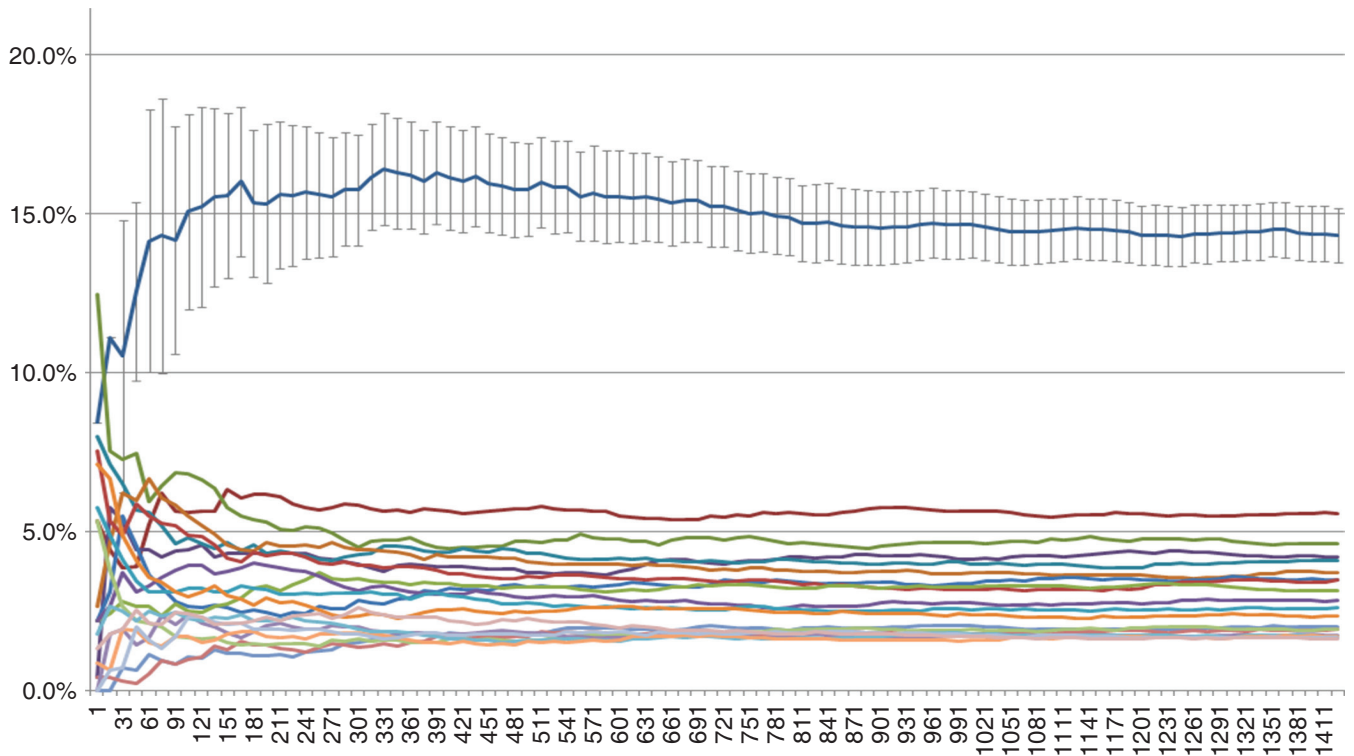

Figure 4: Emergence of a super task

third quartile (50–75 per cent) having as high a score as the bottom task in the first quartile (the top 25 per cent). For half the surveys, the odds were infinite, and the rest ranged from 5,500 to 1 down to 157 billion to 1. Table 1 shows the probability of a task in an average survey having as low a share of the vote as the task ten ranks below it.

In essence, this means that there will always be clear separation between the top tasks and the tiny tasks, making it obvious what to prioritise and what to deprioritise.

Of course, it is never easy to deprioritise tiny tasks because when a tiny task goes to sleep at night, it dreams of being a top task. So many digital teams spend their days defending against the incessant demands of tiny tasks, preventing them from spending the necessary resources to improve the performance of the top tasks — improvements that will not simply enhance customer experience but will deliver greater overall value to the organisation as well.

ANALYSING BASED ON CATEGORY AND DEMOGRAPHIC

To dig deeper into top tasks data, category or demographic questions need to be part of the survey. In December 2017, Customer Carewords carried out a health top tasks survey for the Irish Health Service Executive. The survey included a question that asked people their age range. Table 2 shows the kind of analysis that can

Table 2: Top health tasks by age

	Task	≤17 (%)	18–24 (%)	25–34 (%)	35–44 (%)	45–54 (%)	55–64 (%)	65–74 (%)	Total (%)
1	Mental wellbeing (stress reduction, mindfulness, positive thinking)	6.8	6.4	4.7	4.2	4.0	3.5	2.3	4.5
2	Check symptoms/signs	5.5	4.0	3.3	3.2	2.7	1.8	1.1	2.9
3	Diet, food, nutrition (healthy eating, intolerances, weight)	5.5	2.2	2.8	2.2	1.8	2.0	2.1	2.4
4	Right place to go for help (GP, hospital, pharmacist)	4.8	2.0	2.9	2.8	2.2	2.4	1.3	2.5
5	Emergencies, what to do	4.1	3.4	3.3	2.8	2.2	2.1	3.0	2.8
6	Exercise (benefits, type, fitness goals)	4.1	1.1	1.5	1.4	1.1	1.7	3.0	1.6
7	Costs and fees (treatment, drugs, consultant visits, care)	3.4	5.6	4.6	4.3	4.0	3.1	3.2	4.0
8	Waiting times (hospitals, clinics, other health services)	3.4	4.7	4.8	5.5	6.1	4.7	5.9	4.9
9	Causes of condition/disease	3.4	2.2	1.8	1.3	1.2	1.6	0.9	1.5
10	Confidentiality, privacy, data protection	3.4	1.8	1.3	1.8	1.7	1.9	0.4	1.7
12	Complications of condition/disease	3.4	0.6	0.4	0.6	0.6	0.7	0.8	0.6
11	Diagnosis of condition/disease	2.7	2.7	2.8	3.1	2.8	3.6	3.0	2.9
13	Living/coping with my condition/disease (support, counselling)	2.7	2.0	1.9	2.1	2.5	3.1	1.3	2.2
14	Get involved in improving health services	2.7	0.3	0.6	0.7	0.8	0.7	0.4	0.7
15	Treating minor health problems myself	2.1	2.7	1.2	1.6	0.9	1.3	1.3	1.5
17	Weight (managing, obesity, risk)	2.1	1.6	1.6	1.1	1.3	1.1	1.1	1.4
16	Description of a treatment/procedure	2.1	1.4	1.7	0.9	1.2	1.1	1.7	1.3
18	Risks of being in hospital (hygiene, infections, bugs)	2.1	1.0	1.3	1.3	1.9	2.5	4.2	1.5
19	Screening (breast check, retinal, bowel, cervical)	1.4	3.2	3.8	3.4	3.7	3.7	2.5	3.6
20	Vaccinations, immunisations	1.4	2.1	2.2	1.8	0.8	1.0	0.9	1.7

be achieved when one combines top tasks data with such demographic information.

At a glance, one can observe plenty of commonality of tasks for those aged between 18 and 64. However, those under 17 and over 65, while having some top tasks in common, do have quite distinct tasks. Indeed, if one digs into the data, the task patterns emerge.

As one can see from Figure 5, check symptoms is a top task for younger people but declines in importance as people get older. Simply put, older people know what they are dying from.

However, as Figure 6 shows, understanding how to use health services jumps in importance for those 55 and older.

Meanwhile, as Figure 7 illustrates, there is a U-shape for exercise. This is because exercise is important for younger and older people, but drops off in importance during middle age. These kinds of task insights are useful not simply for digital strategies — by understanding the task that someone cares most about, one understands a lot about that person.

RELATIONSHIPS BETWEEN TASKS

Because people vote on the entire list of tasks, one can perform interesting analyses of the relationships between tasks. Table 3 shows how those who voted for 'diet, food and nutrition' also voted with respect to other tasks.

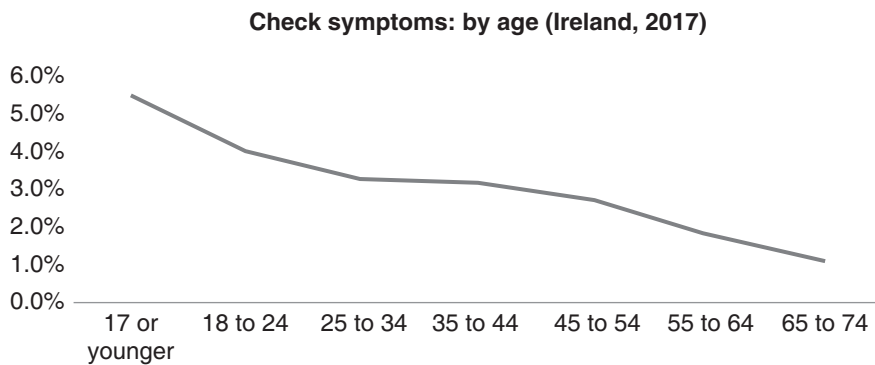The rank column shows what other tasks were also important to them, while the

Check symptoms: by age (Ireland, 2017)
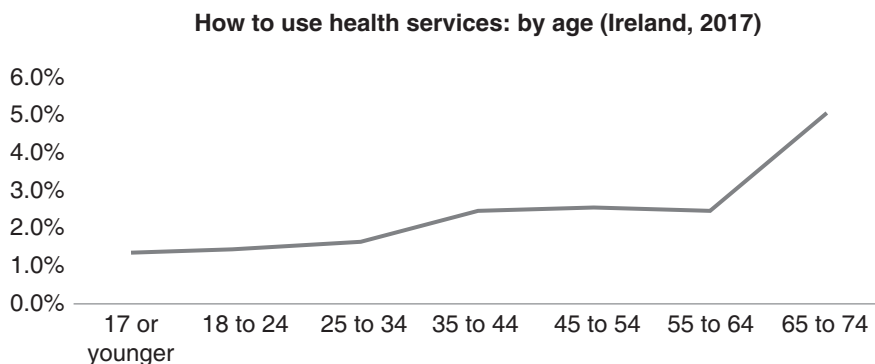

Figure 5: Check symptoms by age

How to use health services: by age (Ireland, 2017)

Figure 6: How to use the health service by age
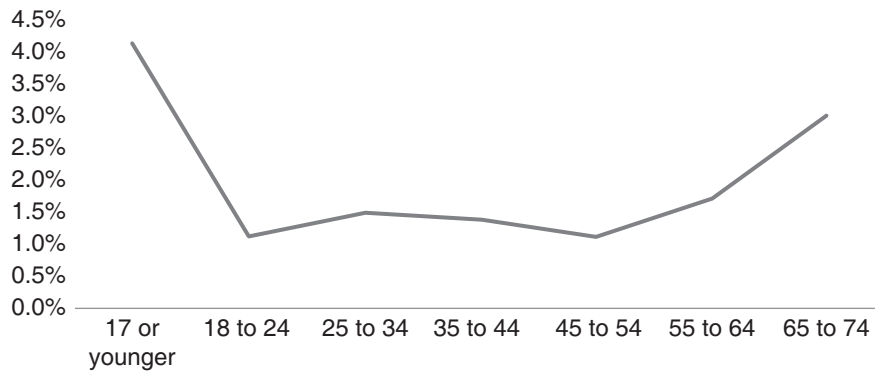
Exercise: by age (Ireland, 2017)

Figure 7: Exercise by age

Table 3: How those who voted for 'diet, food and nutrition' ranked other tasks

Tasks	Rank	Original position
Mental wellbeing (stress reduction, mindfulness, positive thinking)	1	2
Exercise (benefits, type, fitness goals)	2	25
Screening (breastcheck, retinal, bowel, cervical)	3	4
Waiting times (hospitals, clinics, other health services)	4	1
Weight (managing, obesity, risk)	5	32
Check symptoms/signs	6	6
Costs and fees (treatment, drugs, consultant visits, care)	7	3
Emergencies, what to do	8	7
Living/coping with my condition/disease (support, counselling)	9	14
Health services near you	10	8

original position column shows where that task was positioned in the overall vote. The following three tasks stand out:

- 'support to lead a healthy lifestyle' (3rd most important to those who voted for 'diet, food, nutrition', but 36th most important overall);
- change your lifestyle (fitness, weight, smoking, drinking); and
- find out how healthy you are.

Understanding the interrelationships between tasks can support design and content decisions.

COMPARING ORGANISATION TO CUSTOMER

Often, what the organisation sees as important to the customer differs from the customer's opinion on the matter. As such, it is very useful to create a copy of the survey and ask internal stakeholders to vote on what they think are most important to customers. Table 4 shows what happened when this was done for the Irish health survey.

The empathy between organisation and customer is much better than one observes in many other organisations. The major discrepancy here, however,

Table 4: Empathy comparison: Alignment of the internal team to customer needs

Task	% Customer vote (3,613)	% Team vote (66)	Empathy
Waiting times (hospitals, clinics, other health services)	4.9%	6.5%	132%
Mental wellbeing (stress reduction, mindfulness, positive thinking)	4.5%	3.1%	69%
Costs and fees (treatment, drugs, consultant visits, care)	4.0%	2.2%	54%
Screening (breastcheck, retinal, bowel, cervical)	3.6%	2.2%	60%
Diagnosis of condition/disease	2.9%	2.2%	74%
Check symptoms/signs	2.9%	3.7%	129%
Emergencies, what to do	2.8%	2.2%	77%

was with the costs and fees task, where the internal team assigned roughly half as much importance (54 per cent) as did the customers.

SUMMARY

By understanding one's customers' top tasks, one lays the foundations for a great customer experience. The method outlined in this paper provides clear and compelling data to identify these top tasks. Having identified these tasks, one can measure their performance. What are the causes of task failure? What is wasting the customer's time?

Offline marketing is about *getting* attention. Online marketing is about *giving* attention. By understanding customer intent and designing for it, the customer's success translates into our success. This is how Amazon and Google think: become truly obsessed with the customer, know their top tasks and deliver relentlessly on them. This is the way to achieve an exceptional customer experience.

Just as importantly, the identification of top tasks also identifies the tiny tasks. A great many websites and apps are flooded with tiny task features and content. This is stuff that the organisation thinks is important but the customer does not. If we want to simplify and enhance the customer journey and experience, it is important to remove as many tiny tasks' features and content as possible. This is the whole point of identifying top tasks.

Further reading

1. Transform: A rebel's guide for digital transformation by Gerry McGovern Publisher: Silver Beach Publication Date: July 2016, http://gerrymcgovern.com/books/transform-a-rebels-guide-for-digital-transformation/ last accessed 12th September 2018
2. Top Tasks – A How to Guide by Gerry McGovernm Publisher: Silver Beach Publication Date: September 2018 http://gerrymcgovern.com/books/top-tasks-a-how-to-guide/ last accessed 12th September 2018