



CASE STUDIES

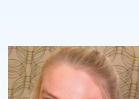
A Look into Twilio's Company-Wide Research Stack.

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“The name of the game when creating and growing a successful business is understanding and solving your customers’ biggest problems. To do so, it’s imperative to have efficient means to identify these problems early and fully.”



Laura Schaffer,
Product Manager for Twilio’s Experimentation Platform

At Twilio, a Fierce Hunger to Learn Fuels Research as a Core Business Strategy

Twilio’s goal, as a business, has been to tap into emerging tech trends to build its business, explains recent analyst reports from Wall Street. The technology operations leader is changing the way that corporations interact with their customers, with the help of augmented reality.

The company is always looking for ways to make its products better. The process of figuring out how to do that according to Schaffer, is all about learning.

“You need to learn new things that are outside of your historical jurisdiction as a company,” she says.

“I think that where research really comes into play and the research methodology is in figuring out how do you best get at the critical piece of information. How do you accelerate your ability to learn and to learn well?”

Research is the backbone of Twilio’s product development strategy. Customer insights programs also drive marketing and sales. All Twilio employees use research in some way as part of their jobs.

“The way that we approach things at Twilio and the way that I’ve tried to help organizations hone that thinking is to provide both mechanisms to ideate and learn and that loose hypothesis-creating environment where you’re just trying to collect information and get your creative juices going.”

Twilio’s ethos as a company is built on having an honest, objective lens into what customers want:

“We have a couple of teams that facilitate teams doing research within themselves,” says Schaffer.

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— Laura Schaffer

Research Is a Part of Everyone’s Daily Responsibilities

One of the biggest challenges that companies face is that they lack time, budget, and resources to administer a formal research program. Some teams even think of research processes as academic rather than business-oriented.

Twilio has adapted the academic discipline of research to the constraints of a fast-moving, aggressively evolving organization.

Schaffer, who comes from a research background from past professional work and undergraduate studies explains:

“Research is part of everyone’s responsibility at Twilio,” she explains. “My team provides an experimentation platform that consists of a suite of tools that companies can use at varying experimentation stages. Our platform makes it easy for teams to pitch ideas, reflect upon hypotheses—and challenge them against each other, and collaborate on which research initiatives are aligned towards our key growth and customer experience needs.”

With brainstorming and exploratory research comes the potential for information overload. Within a cross-functional operation like Twilio, with smart people in every department, every hypothesis has merit.

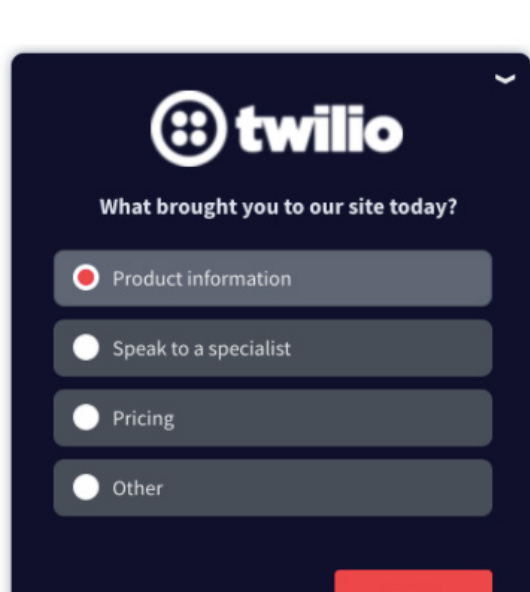
The question is how team members should invest their limited research bandwidth and make the most out of the time.

Over the last year, Twilio has come together as an organization to improve onboarding experiences. The company offers a diverse product portfolio, which means that every customer journey is unique.

“There are so many ways to approach this challenge, from segment development to use case focused approaches,” Schaffer elaborates. “There is a deep brainstorming stage.”

Qualaroo helps Twilio hone this process—not just for the purpose of improving customer onboarding methods but also to guide research operations as a whole.

“Qualaroo allows us to ask our customers questions directly,” Schaffer says. “We wanted to study our customers’ use cases to improve onboarding. Rather than assuming what these use cases were, teams could set up context-based feedback loops to ask questions directly and get the information that they need immediately. This exploratory research helps us arrive at a point where we make the right hypotheses to test and experiment upon.”



Qualaroo’s Question Engine Connects Fragmented Data Points with Core Business Strategy

“As an organization, we’re proponents for helping teams find answers quickly, iterate in the best way, and understand customers in depth,” says Schaffer. “Our research platform team also works with a data platform team that accelerates the company’s ability to share information.”

Qualaroo is the glue that connects research and insights teams together. Across Twilio, 18 teams have access to the tool as part of their workflows, with N active users relying upon it for insights each day. Information-gathering velocity is especially important for an organization like Twilio that ships N features each week. At any given time, N people are Qualaroo.

“Qualaroo immediately became a top choice for us because it is so easy to use,” says Schaffer. “Teams are excited to use it. That’s a value proposition for us because we have a small team mentality—we operate and move quickly, so the tools that we use require a degree of intuition.”

Here are some ways that teams across Twilio are using Qualaroo to improve customer onboarding, engagement, and retention rates:

- ✔ Providing unique guidance to set up appointments, schedule reminders, reply back, and ask follow-up questions
- ✔ Asking targeted questions about what specific customers want or need help with achieving, to enable more productive appointments and working sessions
- ✔ Shortening communication cycles so that account reps can set up appointments directly from Qualaroo, rather than needing to schedule calls
- ✔ Providing clear step-by-step guidance with targeted questions
- ✔ Sourcing information to mock up customer experiences on the fly, by sourcing answers to questions in an expedited manner
- ✔ Gathering data to share between groups for faster, more efficient collaboration

“We use Qualaroo programmatically and systematically to gather the insights we need to make decisions in a fast-moving environment,” says Schaffer.

This process systematically increased onboarding engagement rates by N% over the last [timeframe].

“Qualaroo gives us the insights we need to answer specific questions, connect with our customers, and feed our hypothesis engine,” Schaffer says.