

Multi-channel Technologies Omnichannel Human-Centered Design Chatbot User Testing Plan – Phase IV

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Overview

Team:

Department of Veteran Affairs (VA)
VEO Multi-Channel Technologies (MCT)

Product

MS Virtual Agent (Chatbot)
MS Dynamics Omnichannel for Customer Service (Agent CRM)

Background

VA contact centers are working to create an omnichannel experience by implementing Microsoft Dynamics365 across lines of business (LOBs). While the technological aspects are researched and understood by both stakeholders and the Office of Information Technology (OIT), Human-Centered

Design is required to understand the different user segments who contact VA contact centers and their preferred channel preferences for communication.

The human-centered design (HCD) team will use an HCD approach to test past insights and prioritized use cases for VA's pilot omnichannel chatbot and chat experience. User testing validates insights and helps better understand user needs so that the HCD team can refine prototypes and provide recommendations that are both functional and intuitive.

Method

1. What method of research are you planning?
 - Remotely moderated interviews with Veterans where they have a link to low-fidelity wireframes that will guide them through specified scenarios.
2. Why this method? How does this methodology help you answer your research questions?
 - This approach will allow us to understand the desirability of certain key chatbot capabilities to inform feature design and development.
3. Where are you planning to do your research?
 - Remote.
4. What will you be testing? *(Design mocks, card sort, prototype, page, content, etc.) *
 - Low-fidelity, clickable wireframes.
5. Remote: What tool do you plan to use?
 - Perigean: Zoom video conferencing, screen sharing, and dial-in number.

Research questions

What question(s) do you hope to be able to answer after completing this research?

We will test chatbot capabilities with Veterans to understand Veteran preference and help guide design recommendations for chatbot and chat development.

User Testing Objectives

1. Understand the ideal wait time and call back experience across multiple communication channels.
2. Test a variety of methods for notifications that a user might experience while using VA chatbot and live chat.

Hypothesis

What is your hypothesis for this research?

- Users will prefer callback options rather than waiting for extended periods of time when being connected with a live agent via chat, but those channels will vary based on user preference and type of inquiry.

- Providing users a mix of visual and auditory notifications will draw their attention to chat but their design should not be so intrusive as to overwhelm users.

Participants and Recruitment

Participant criteria

What are you looking for in a participant?

- 10 user testing sessions
 - New VA.gov user type
 - Recruit new VA.gov users include participants who do not have much previous experience using VA.gov to find information or navigating their online content. They may either not have a VA.gov online account or have recently set up their account.
 - 3 or more.
 - Active VA.gov user type
 - Active VA.gov users include participants who frequently use VA.gov to find information and/or actively use their VA.gov online account.
 - 3 or more.

Screening Questions

- Can you access a laptop or desktop computer with an internet connection? (If not, then do not recruit).
 - If yes, then continue.
- Language: Must be fluent in spoken English so the researchers can communicate with them.

Demographics

- Rationale:
 - Mirror general Veteran population and over-sample largest minority groups based on the national Veteran population model:
https://www.va.gov/vetdata/docs/Demographics/New_Vetpop_Model/Vetpop_Infographic_Final31.pdf and
<https://www.va.gov/VETDATA/docs/SurveysAndStudies/VETPOP.pdf>
 - Gender:
 - 3 or more women
 - 3 or more men
 - Age:
 - 1 or more 18-24 (U)
 - 1 or more 25-34 (W)
 - 1 or more 35-44 (X1)
 - 1 or more 45-54 (X2)
 - 1 or more 55-64 (Y1)
 - 1 or more 65-74 (Y2)
- Please track the same demographic information as the Omnichannel Experience Strategy study so this team can compile an aggregate report on all participants throughout this project.
- Please track population density/geographical area type for each participant. E.g. Rural, urban.

Recruitment Strategy

Please recruit via the existing recruiting contract.

Testing Details & Timeline

Notional Timeline

Design Plan Submission	August 4
Design Concepts Completed	August 11
Facilitation Guide Completed	August 13
Test Sessions Begin	August 16
Test Sessions Completed	August 20
Testing Results Evaluation Completed	August 27
Design Recommendations	August 30

Testing Timeline

1. Timeline: What dates do you plan to do research?
 - a. August 16 – 20
2. Prepare: When will the thing you are testing be ready? (Goes without saying but should be a few days before testing will begin.)
 - a. August 11
3. Length of Sessions: How long do you estimate each session will be? (This helps with scheduling & thank you gifts.) e.g., 30 minutes, < 1 hour, up to 2 hours, up to 4 hours)
 - a. Up to 1 hour
4. Availability: If applicable, when would you like sessions scheduled? **Please list exact dates and times in EASTERN Standard Time**. Please request enough dates and time slots (e.g., Monday 9-1, 3-6; Tuesday 9-6, etc.). Be as flexible as possible, cognizant that many Veterans are only available before and after working times, and live across the U.S.
 - a. Our goal is to speak to a minimum of 10 Veterans
 - b. Please allow at least 30 minutes between each 60-minute session
 - Monday, August 16 through Friday, August 20 EST at the following times
 - 9:00 – 10:00 am
 - 10:30 – 11:30 am
 - 12:00 – 1:00 pm
 - 1:30 – 2:30 pm
 - 3:00 – 4:00 pm
 - 4:30 – 5:30 pm
5. Pilot: Please indicate a date before your sessions begin for piloting your research. Which member of the design team will you pilot your research with?

- a. Friday, August 13 (preferably between 12pm and 5pm ET)
 - b. Chris Beard, Melody Laishram, and Kateleigh Clark can serve as the POCs for the pilot:
Christopher.beard1@va.gov ; Melody.Laishram@va.gov ; Kateleigh.Clark@va.gov
6. Additional recruiting requests:
- a. Confirm in advance that each Veteran participant has access to a computer or laptop with connection to the internet.
 - b. To reduce the no-show rate, please do the following:
 - i. Confirm each interview with the participant in advance.
 - ii. Text or email a reminder to each participant the morning of their interview.
 - iii. Call the Veteran to confirm if you do not hear back.

Team Roles

Please list the people who will be serving in each role. **Include the primary phone number for moderator and the emails for moderator, notetaker, and observers. If you need Perigean to take notes for you, indicate that next to Notetaker**

- Moderators:
 - Christopher Beard
 - 850-264-4300
 - Christopher.Beard1@va.gov
 - Melody Laishram
 - 408-315-5481
 - Melody.Laishram@va.gov
 - Kateleigh Clark
 - 973-271-5889
 - Kateleigh.Clark@va.gov
- Research guide writing and task development (usually but not always same as moderator):
 - Kateleigh Clark, Melody Laishram, Christopher Beard
- Participant recruiting & screening:
 - Perigean
- Project point of contact:
 - Kevin Clawson and Medha Kulkarni (VEO Project Managers); Chris Beard, Kateleigh Clark
- Participant(s) for pilot test:
 - Chris Beard, Melody Laishram, Patrick Onesty (patrick.onesty@va.gov)
- Note-takers: Moderators, plus:
 - Patrick Onesty
- Observers:
 - Kevin Clawson: kevin.clawson@va.gov
 - Medha Kulkarni: medha.kulkarni@va.gov
 - Luciana Morais: luciana.morais@va.gov
 - Ahmed Kochaji: ahmed.kochaji@va.gov
 - Chase Collins: chase.collins@va.gov
 - Charles Tubbs: charles.tubbs@va.gov
 - Steve Gabris: steve.gabris@va.gov
 - John Rocco: john.rocco@va.gov

- Chad Gerstman: chad.gerstman@va.gov
- Laura Falendar: laura.falender@va.gov
- Reginald Martin: reginald.martin@va.gov
- Patrick Onesty: Patrick.onesty@va.gov
- Tasmia Moulvi: Tasmia.moulvi@va.gov
- Confirmed participants:

Several team members are contractors with Booz Allen and Aptive Resources. Please ONLY use VA.gov email addresses to protect Veteran PII. Thank you!