

Multi-channel Technologies Omnichannel Experience: Phase IV Chatbot User Testing Facilitation Guide

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Table of Contents

Overview.....	2
Key Objectives	2
Questions by Topics.....	2
Testing Method	2
Research Activities	2
Facilitation Guide	4
Introduction.....	4
Agenda.....	5
Background Questions	5
VA Engagement Questions.....	6
XD Phase IV Prototype	6
XD Phase IV Prototype.....	7
Email	9
Phone.....	10
Text Message.....	11
Opted to Wait for an Agent.....	11
Follow-Up Questions	12
Conclusion	12
Close Out	12

Overview

Key Objectives

1. Understand the ideal follow up experience; example designs may address things like channel options call back, issue resolution, desired chat wait times, etc.
2. Test a variety of notification methods that a user might experience while using the VA chat.

Questions by Topics

High Priority	
Topic	Supporting Questions
Follow Up Function	<ol style="list-style-type: none">1. Understand the ideal following up experience.2. What channel do users prefer when opting for a live agent to return a reply later than waiting in a wait queue?3. Validate if users would or would not wait for a live agent when being escalated from a chatbot.
Medium Priority	
Topic	Supporting Question
Notifications	<ol style="list-style-type: none">1. Identify which method of notification most users find useful.2. Identify what various notification mean to users when experienced.

Testing Method

The goal of this phase is to expand on research findings from the usability tests conducted during Phases I, II, and III. In this study, the team will use a series of clickable low-fidelity wireframes to guide users through a chat experience and give them a choice between waiting on hold or choosing a follow up conversation to resolve their issue. It will also include different notification methods to evaluate user preferences for specific design patterns. Below are a few testing methods for collecting qualitative data on (1) chatbot follow up functions and (2) the desirability of certain notifications.

Research Activities

Activity / Fidelity	Definition - What is this method?	Rationale – Why did we choose this method?	Benefit	Limitations
1:1 Interviews	The team will ask a series of questions to understand	Individual interviews allow researchers to probe into the user's	Simplicity: The facilitator can ask direct	Withholding Information:

<i>Low, Content</i>	desirability, participant sentiment on design features, and usability.	past experiences and identify significant expectations or concerns for their future service interactions.	<p>questions to the user.</p> <p>Natural flow of conversation: The conversation is structured, but flexible and may uncover unique stories/ unexpected insights.</p>	<p>Users may fear hurting the teams' feelings or feel embarrassed and withhold complete judgment and honesty.</p> <p>User perception: What the user says may not always match their real-life interactions.</p>
<p>Digital Prototypes</p> <p><i>Low, Interaction</i></p>	The team will provide a clickable prototype that will simulate a user story scenario to observe how the user interacts intentionally and unintentionally within a chat experience.	Digital prototypes help inform the usability of certain chat features by simulating an interactive experience. The intent is to immerse the user in a realistic scenario and give the design and development team a chance to pivot before development begins.	<p>Genuine observations: The facilitator can observe the habits and behaviors that a user may not realize themselves.</p> <p>Realistic Simulation: Closely simulates what would occur within a chatbot and chat experience.</p> <p>Quick/low effort: Designers can quickly</p>	<p>Platform limitations: The HCD team is limited to capabilities of Sketch and InVision.</p> <p>Technical constraints: The HCD team is reliant on the user's access to the internet and their ability to navigate remote conferencing platforms such as Zoom.</p>

			mockup a chat or chatbot environment without the complications of coding and development.	
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Facilitation Guide

Introduction

***Note to Facilitator to turn on Camera and enable screensharing.**

Introduction Script.

Thank you for taking the time to give us your feedback. My name is *[insert name]*, and I will be facilitating today's testing session. *[Optional: Introduce government observer, notetaker, and others present.]*

We are working with VA to improve the VA contact center experience. Our goal is to gather feedback on a planned VA.gov chat option and understand how it might help Veterans, Caregivers, and their beneficiaries in carrying out their goals.

With your permission, we are going to document this session using written notes, screenshots, audio, and/or video recording. We will only use the information you share with us for research and analysis, and we will not share it with anyone outside of our project team at VA. Do you understand these guidelines and consent to this interview being documented via written notes, screenshots, audio and/or video recording?

☐ Yes, consent provided

☐ No, do not record

Great, thank you. Before I go over the agenda for today's session, I have two other things to note:

1. **[Observers]** My colleague will be observing and taking notes on the call. This helps me to stay involved and focus on our conversation. Is that ok with you?
2. **[Stopping & Aggregation]** I also wanted to let you know that your participation is entirely voluntary, and we can stop at any time. You are also welcomed to decline or skip any question. In our notes, we will remove any personally identifying information such as your name or benefit eligibility status, and combine them with other participants' information, so no feedback will be directly tied to you. Is that all right?

**** Note to Facilitator to notify the participant once the recording has started.***

Agenda

To give a quick **overview** of what we will run through, here is our agenda for today:

This session is set to be no more than one hour. In a moment I am going to ask you to share your screen while we are testing the product and turn on your camera if you feel comfortable doing so. Let me know if you need help sharing your screen.

[For users on mobile only, note that there are additional confirmation modals that the user may have to go through. Also, they may have to change access permissions in their Settings if they do not automatically allow Zoom to share their screen.]

We will ask you to use go through a design that we will share in just a moment. It is important to remember that we are not testing you, we are testing this product. You cannot do anything wrong here. *****Note for Facilitator** (If needed) Provide additional context that the user is just testing the chatbot and not the website.***

As you go through today's session, please think aloud as much as possible. Describe what you are looking at, what you are trying to do, and what you are thinking. We especially want to know if there is anything you like or do not like, or if there is anything you find confusing. We want your complete honesty.

Throughout the prototype, I will ask a few questions to better understand your thoughts and opinion.

*****Note for facilitator and note taker** These quick chats are specific to instances that are outside of the planned scenario. This is a way for us to capture the engagements in which the user might "break the bot."***

After we complete all the tasks, I will ask you about your overall impressions of the experience and take note of any general comments you have. I cannot stress enough your honest feedback will help us make a better chatbot. Please do not hold back. Even small or nitpicky things are helpful. You will not hurt our feelings if you are brutally honest!

Do you have any questions at this point?

Background Questions

Before we begin, I have just a few background questions. Please note you have the option to skip or decline any of these questions.

VA Engagement Questions

1. In the last month, how often have you used VA.gov to find information or learn about VA programs?
 - a. None
 - b. 1-2 times
 - c. 3-5 times
 - d. More than 5 times
2. Would you say that is typical of the amount of time you spend on VA.gov in an average month?
 - a. Yes
 - b. No
3. Do you have an online account on VA.gov?
 - a. Yes
 - b. No
4. [If yes] in the last 30 days, how often have you signed into your online account?
 - a. None
 - b. 1-2 times
 - c. 3-5 times
 - d. More than 5 times
5. Would you say that is typical of the number of times you use your VA online account in an average month?
 - a. Yes
 - b. No

XD Phase IV Prototype

Thank you for your answers so far. Now we can move on to the testing activity. To get started, please open your web browser, Chrome seems to work best, and share your screen. Then I will send over the link to the instructions in the chat window.

Instructions for Facilitator.

1. Send over InVision Link
2. Have the user to set zoom setting to 90% by pressing control and the minus button.

Any questions, comments, or concerns so far? Great! Let us begin...

Hey Scenario: In this session, you are looking to find out when you will receive your approved claim payments.

XD Phase IV Prototype		
Testing Feature	Pertinent Notes – Utterances and Actions	Solution — desired user action
Story: Users decides to use the chatbot “You are on VA.gov. You have decided to use a chatbot. How would you go about that?” Category: engagement Testing Category: N/A	<i>Note user actions. Did the user have difficulty noticing the icon? Where did the user gravitate towards?</i>	N/A
Story: Chatbot notifies user that they need to escalate “The chatbot opens up. After a few exchanges with the chatbot, it’s determined that your inquiry should go to a live agent.” Topic: Notification Testing Category: Opening notifications	<i>Note user actions.</i> 1. Other than the chat window appearing, would you expect any type of notification or sound at the start of the chat?	N/A
Story: Chatbot starts escalation. Provides estimated wait time. “You’ve opted to being escalated. Tell	<i>Note user actions.</i> 1. <i>Is there a specific amount of time that you would be willing to wait? What would happen after 5 mins? What about 10 mins?</i>	N/A

<p>me what you think would happen next”</p> <p>Topic: Escalation Testing Category: Escalation Expectation</p>	<ol style="list-style-type: none"> <i>(If the user mentions callback) When should this option be offered to you?</i> <i>(If the user did not mention callback) have you ever selected an agent to call you back? How would adding a follow up feature to this chatbot change your experience?</i> 	
<p>Story: Chatbot offers to have an agent follow up later if user does not want to wait. “The chatbot sees that the wait will be “X” minutes and offers you if you would like an agent to follow up with you at a later time”</p> <p>Topic: Follow Up Testing Category: Desirability</p>	<p><i>[observe] How does the user react?</i></p> <ol style="list-style-type: none"> <i>Tell me why you choose (to or not to) have an agent call you back?</i> <i>If user selects no, go to page <u>“X”</u></i> 	<p>User either selects yes or no.</p>
<p>Story: User has selected for an agent to Follow Up. “You’ve opted in having an agent follow-up with you later. You are presented several options for the agent to follow-up with you. What do you choose?”</p> <p>Topic: Follow Up</p>	<p><i>[Observe] Which option does the user choose when having an agent follow up with them?</i></p> <p><i>[Ask]</i></p> <ol style="list-style-type: none"> <i>Why did the user choose this option?</i> <i>Are there any other options you would want available to you that are not listed here?</i> 	<p>User selects one of the Follow Up options. (Phone, email, text, AVA)</p>

Testing Category: Preference of Channel		
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Email

Story: User selects to be followed up by email. “You’ve opted in having an agent follow-up with you by email. The chatbot prompts you for more information Topic: Follow up Email Testing Category: Follow up by email	<i>[Ask]</i> <ol style="list-style-type: none"> 1. <i>What information would want to provide a live agent if you wanted them to email you back about your inquiry?</i> 2. <i>Is there any information that you would feel uncomfortable having included in a follow up email?</i> 3. <i>How long do you think it would take for a reply by email?</i> 4. <i>How many emails do you get from VA in a week? How would VA communicate this email is the follow-up email? What would you put in the subject line?</i> 5. <i>What would you do if you had more questions?</i> Click here to go to evaluation questions	n/a
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Phone

<p>Story: User selects to be followed up by phone. “You’ve opted in having an agent follow-up with you by phone. The chatbot prompts you for additional information”</p> <p>Topic: Follow up Phone Testing Category: Follow up by Phone</p>	<p><i>[Ask]</i></p> <ol style="list-style-type: none"><i>1. If you were already logged into your VA account, would you expect to have to re-enter your phone number? Why or why not?</i><i>2. What information would want to provide a live agent if you wanted them to call you back about your inquiry?</i><i>3. Is there any information that you would feel uncomfortable sharing over the phone?</i><i>4. How long do you think it would take for VA to call you back?</i><i>5. How might we make calling you back easier?</i><i>6. Would you want to schedule your call back?</i><i>7. Do you usually pick up calls from unrecognized numbers? How would you know if the VA is calling you?</i><i>8. What would you expect would happen if you could not pick up the phone when the VA tried to call you back?</i><i>9. What level of information would you expect a voicemail to have?</i><i>10. How many times do you think the VA should try to reach you?</i><i>11. What would you do if you had more questions?</i> <p>Click here to go to evaluation questions</p>	<p>n/a</p>
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Text Message

<p>Story: User selects to be followed up by text. “You’ve opted in having an agent follow-up with you by text. The chatbot prompts you for additional information”</p> <p>Topic: Follow up Text Testing Category: Follow up by text</p>	<p><i>[Ask]</i></p> <ol style="list-style-type: none"><i>1. What information would you think want an agent to know to follow up with you by text?</i><i>2. Tell me a little about your texting habits</i><i>3. Is there any information that you would feel uncomfortable sharing over the text messages?</i><i>4. How long do you think it would take for VA to text you back?</i><i>5. How would you know if this was an official VA text message and not some scam?</i><i>6. What would you do if you had more questions?</i> <p>Click here to go to evaluation questions</p>	n/a
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Opted to Wait for an Agent

<p>Story: User selects to wait for a live agent in the chat window. “You’ve opted in to wait for a live agent.”</p> <p>Topic: Follow Up Text Testing Category: Follow up by text</p>	<p><i>[Ask]</i></p> <ol style="list-style-type: none"><i>1. How long would you wait for a live agent?</i><i>2. Would you like to be re-offered the choice for a follow up?</i>	n/a
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Story: User navigates to another tab while waiting for a live agent. “You’ve decided to pass the time by going to your favorite website.” Topic: Follow Up Text Testing Category: Follow up by text	<i>[Ask]</i> <ol style="list-style-type: none"> <i>1. How would you know that it is your turn in the queue?</i> <i>2. If you didn’t noticed that it was your turn, how long would you expect the VA to hold your position in the queue?</i> <i>3. When should this be communicated to you?</i> 	n/a
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Follow-Up Questions

1. How do you feel about this session?
2. Is there anything that you would like to tell us about why you chose the ratings above?
3. Was there anything that frustrated you?
4. Was there anything you were pleasantly surprised about?

Conclusion

1. Any other comments you would like to mention before we wrap up?

Close Out

Great, thank you for your feedback today. *[optional: I would like to open it up to my teammates on the line to see if they have any questions that they might like to ask.]*

Well, again, on behalf of our team, I would like to thank you for your time today. Your feedback and insights will play a key role in helping us build an accessible and helpful chatbot experience.

Thank you. Enjoy the rest of your day! Goodbye 😊