**Facilitation Guide**  
10.18.2021

# Section 1: Introduction & Openers

**10 Minutes**

### Introduction with Consent for Documentation

***Script****Thank you for meeting with us today. We are working with VA to better understand how we can create a more consistent experience that assists Veterans, Transitioning Service members, and their beneficiaries as they interact with the VA automated phone systems.*

***Define***  
*These automated phone systems are also known as IVRs, which is the easier way of saying “Interactive Voice Response.” So, for example, when making a phone call to VA or other organizations you typically navigate a selection of options before speaking to a live person. That series of pre-recorded messages and menus is what we’ll define as the IVR. If needed l can explain more, but does that make sense to you?*

*Great, moving on…*

***Consent***  
*Your participation is entirely voluntary, and you are free to end the interview at any time. If you would like to slow down or pause for questions at any point in our conversation, or if you would like to take a break, please let us know. This interview is scheduled for 60 minutes so that we can maintain a pace that is comfortable for you. Don’t be afraid to speak up and let us know how you feel or what you need.*

*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. Additionally, your name will not be included in our notes and all of your information will be remain secure and private amongst our internal research team. Do you understand these guidelines and consent to this interview being documented via written notes? What about screenshots? Audio and video? Great, we will respect your wishes!*

***[X] if consent was provided.***

[ ] Written Notes

[ ] Screenshots

[ ] Audio and video

### Participant Background

***Script***   
*Before we get started with our activities, I would love to learn more about you.*

* **Tell me a little about yourself and your history with VA.**
  + How long have you been enrolled in VA?
  + How often do you do interact with VA?
  + Are you currently receiving any VA benefits? (disability compensation, education, etc.)
* **Please describe your comfort with technology.**

# Section 2: User Interview Questions

**50 Minutes**

***Script****We want to better understand your experience with VA and other IVRs. By sharing your interactions and experiences navigating different IVR systems— we can better understand your perception of VA and hopefully improve yours, and others’, experience for the future.*

*It is important to remember throughout this activity that your honesty is incredibly important to us. We are designers who want to improve your experience and genuinely want to know what you do and do not want. Nothing you say can hurt our feelings.*

*There will be two main parts to our conversation today. In the first part we will give you a hypothetical task and have you dial a VA phone number and use its IVR to complete that task. If we have time, we may do this multiple times, including IVRs from the private sector to gauge preference. Examples from the private sector include: TBD. In the second part we will simply have a conversation with you about your experience with VA’s IVRs in general and any other automated phone systems you may use outside of VA.*

*Do you have any (other) questions before we begin?*

## Part 1: Observing Live Use of VA IVRs

**30 Minutes – Questions in BOLD are priority.**

***Script****To prepare for the first part, can you get either your cell phone or home phone and bring it to the computer?*

*Great! /* [Troubleshoot if necessary: If it will be difficult for the participant to call themselves on speakerphone, offer that the facilitator call. In this alternative method, the facilitator merely needs to add the instruction that the participant make sure they tell the facilitator what to enter on the dial pad and confirm the action while still sharing their thoughts out loud as they navigate.]

*Once we give you the task you will be completing using the phone system, we will have you do is put it on speakerphone, and then we will give you the number to dial.*

*Throughout the call, we ask that you tilt down your webcam to show your fingers on the dial pad so we can see exactly what you are selecting over the course of the call. We also ask that you verbalize what you are thinking when on the call and making decisions on what to select. Everything is important, so even if you are pausing because you are unsure, or you didn’t hear something, or you may be confused… those are all things we want to know, so please share those thoughts with us out loud. Please also feel free to hang-up and call it again if that is what you would do in the task scenario given.*

*As much as we will probably want to ask you questions in the moment, we will save them until after you believe you have completed the task. Please let us know if you do get to a point where you feel like you are absolutely stuck and we can advise. Also, should you enter a queue to speak with an agent, we will intervene and ask that you hang up.*

*Any questions before we continue?*

*We will now give you the name of the VA phone number that we will be calling and the task you will try to complete using it.*

|  |  |  |
| --- | --- | --- |
| **IVR** | **Phone Number** | **Task Prompt** |
| MyVA411 (Tier 1) | 800-698-2411 | Primary: TBD (Example: You received a bill for $36, and you want to call in your payment.)  Secondary: TBD |
| National Call Center | 800-827-1000 |  |
| Education Main | 888-442-4551 |  |
| Community Care | 877-881-7618 |  |
| MS Help Desk | 877-470-5947 |  |
| MS First Party Billing | 866-400-1238 |  |
| Pharmacy Customer Care | 866-400-1241 |  |

[Facilitators do not intervene unless requested or if participant enters and agent queue. Once the participant reaches an endpoint (completes task, enters queue, disconnects, etc.) the facilitators will speak up.]

*Wonderful! Thank you for doing that. How do you think it went?*

[After the participant responds with their open-ended feedback, facilitators will then probe on specific topics based on the participant response and what the facilitators observed. The follow-up questions will likely include many of the following:]

* Language/Content
  + I noticed you paused for a while after [a menu]. Can you tell us why?
  + Was there anything that was confusing or unclear?
  + How might you organize the information on this menu (or script)?
  + Are there any words you would add or replace?
  + What does that term (or phrase) mean to you in context?
  + What do you interpret that option (or statement) to mean?
  + What options do you remember from the first menu?
* Navigation
  + Do you know where you are in the phone system?
  + Do you know how to go back to a previous menu?
  + Which buttons might you want to use to do things like…
    - return to the very beginning of the IVR?
    - go back/up to the last menu?
    - hear the menu or message again?
* Error Prevention/ User Help
  + [If they made a mistake or wrong selection] How might you handle a wrong selection or mistake here?
  + Which buttons would you typically push, or that you would want to use, in order to get help or clarification?
  + At any point, would you have wanted the system to request confirmation once you pushed a button and before moving forward?
* Aesthetics
  + Tell us how you felt about the speed at which information is presented in scripts and menus.
  + What did you think about the sound quality? What about the voice used throughout the menus and messages?
  + How might you want to simplify this phone system? What might make it feel cleaner?
* Emotion (Trust, Perception, etc.)
  + [Probe further into the cause of user emotion when observing them navigate an IVR]
  + Did you think any you heard just now were longer than you would like? What is your tolerance for long messages on the VA phone systems?
  + What most frustrated you during those calls? What, if anything, made you feel good?

[If necessary, the facilitator may have the user call again and try to complete the task again based on possible alternative paths discussed during the retrospective. The facilitator may also use the secondary task prompt to go through the same IVR.]

## Part 2: Discussing Participant Experience with VA and other phone systems

**15 Minutes – Questions in BOLD are priority.**  
***Script****Now we would like to talk to you about your experience in general using VA phone numbers, and even other non-VA phone systems. To start, can you tell us a little about your previous experience with VA contact centers and phone numbers? …*

[The following questions may be asked depending on the participant’s initial response shared and their previous experience with VA IVRs.]

* Which line or number do you feel behaves the most oddly when you call it?
  + Is there a VA phone number you call which has menu options that often causes you to make mistakes?
* When are you willing to call VA numbers that you know have these automated IVRs?
  + When do you try to avoid them? Why?
  + **When do you may prefer an IVR that lets you tell them verbally what you are trying to accomplish compared to the button based one(s) you just experienced?**
  + **What has angered you when using phone systems in the past? Has anything particularly delighted you?**
  + **What would make you feel valued and honored when engaging with VA over the phone?**
* How might VA better align its phone systems with other channels of communication (websites, mail, in-person)?
* **When using VA phone numbers, in what situations do you find yourself wanting the option to speak to an operator/agent? How frequently do you feel this way?**
* Tell us about scenarios when you want the ability to skip over messages and to another part of the phone system.
* **Does the complexity of an issue, or concern, influence how you navigate an IVR?**
* What are some expectations you have for VA when transitioning you from IVR to another menu or live agent?
  + Would a transfer effect your level of trust? If yes, how so?
* If VA were to ask you for feedback about an IVR experience, how would you prefer to provide this information? (Immediately after the experience vs. email or phone follow up)
  + How in depth do you normally like to provide feedback?
  + When on the call do you think it makes the most sense to provide feedback?
* Tell us about your best customer service experience when you were trying to resolve an issue in the past over the phone.
* If you had a magic wand, what would you do to change VA’s IVR phone system?

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# Section 3: Closeout

**5 Minutes**

***Script***   
*Thank you for your time and patience today. Your feedback is greatly appreciated! What we learned today will directly influence how VA phone systems are improved and help us determine the direction of future technologies.*

*Before we close out, is there anything you would like to tell us or ask us that we haven’t covered today?*

*Thank you so much for your service to our country and for giving us your time today. We sincerely appreciate our Veterans and the sacrifices you all made for our country and hope to make your VA experiences stronger in the future. Enjoy the rest of your <morning/afternoon>!*