**Research Plan for MCT IVR Experience Discovery**

Date updated: October 13, 2021

Points of contact:

* Kate Buker, Veterans Experience Office (VEO), Multi-channel Technologies (MCT)
* Haley Rolince, Kt Gregory and Stephen Arlington, Booz Allen HCD Team

**Goals**

1. **What product & team are you doing this research for?**

Team: Department of Veterans Affairs (VA) Veterans Experience Office (VEO) Multi-channel Technologies (MCT)  
Product: Interactive Voice Response (IVR) Experience

1. **Background:** The VA Multi-Channel Technology (MCT) IVR Experience team seeks to build upon previous Veteran research to improve the experience of callers as they use VA’s many IVRs which act as the first line of guidance when they dial a VA call center.
2. **Research questions:**
   1. Facilitators will have participants call several VA and industry IVRs and ask them to use the IVR to achieve a certain scenario goal, such as “You received a bill for $36, and you want to call in your payment” for the First Party Billing IVR.  
      Follow-up questions may include:
      1. “I noticed you paused for a while after that menu. Can you tell us why? Was there anything that was confusing or unclear?”
      2. “How might you organize the information on this menu (or script)? Are there any words you would add or replace?”
      3. “What does that term (or phrase) mean to you in context?”
      4. “What do you interpret that option (or statement) to mean?”
      5. “Do you know where you are in the phone system? Do you know how to go backwards?”
      6. [If they made a mistake or wrong selection] “How might you handle a wrong selection or mistake here?”
      7. "Tell us how you felt about the speed at which information is presented in scripts and menus.”
   2. Facilitators will also ask more traditional interview questions after observing participants use the IVR. These questions will include:
      1. [For users familiar with multiple VA IVRs] “Which line or number do you feel behaves the most oddly when you call it?”
      2. “Is there a VA phone number you call which has menu options that often causes you to make mistakes?”
      3. “How might VA better align its phone systems with other channels of communication (websites, mail, in-person)?”
      4. “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?”
      5. “Where might a call-back option be most beneficial?”
      6. “Tell us about scenarios when you want the ability to skip over messages and to another part of the phone system.”
      7. Explore where users believe there is a great need for the IVR to pass their responses or information on to a live agent
3. **Hypothesis:** What is your hypothesis for this research?  
   Our hypothesis is that callers need more flexibility, choice, and guidance when using a VA IVR system in order to efficiently complete the task at hand. We also hypothesize that greater consistency and standardization of how IVRs behave and sound will improve the caller experience for all.

**Method**

1. Research Methodologies:
   1. Directed interviews in which the HCD team facilitates the participant navigating various key VA IVR systems using specific jobs-to-be-done. In addition to observing and recording the participant’s actions, the HCD team will probe with questions on moments of frustration, confusion, delight, and success.
   2. All interviews and activities will be remotely moderated and tailored to meet participant needs or constraints
2. Why this method? How does this methodology help you answer your research questions?
   1. Directed interviews allow the team to gather specific and nuanced feedback regarding how the participant experiences different parts of VA’s IVRs.
   2. Due to the COVID-19 pandemic, these sessions will be remote
   3. Calling IVRs together with the participants will help the research team collaborate with the users to fully understand their needs as a user of the IVRs and explore what they may want improved
3. Where are you planning to do your research?   
   The research team will use Perigean Zoom and MURAL as a remote facilitation tool. This methodology has been used on numerous MCT projects by the HCD team
4. What will you be testing?   
   We will be calling various VA phone numbers which use an IVR system to automatically field and direct callers to the information or agent queues they need.
5. If remote: What tool do you plan to use?   
   Perigean Zoom and caller’s personal phone. The research team needs to confirm that the Perigean Zoom account will allow us to dial an external phone number and both the facilitator and participant will be able to use the dial pad once the call is connected. If this is not possible, we will still use Zoom, but the participant will simply use their personal phone to call the IVRs and have it on speakerphone near their computer microphone. In the latter case, the participant would either verbalize their selection (number pressed) or show us their dial pad using their webcam.

**Participants and Recruitment**  
Please list your participant criteria in two categories-

* 1. **Primary criteria / Must have** - what absolutely must be true in order to run your study? The clearer you can write this criteria, the easier it is to find matches for your study. (i.e. if your study will only work if you're talking to Veterans who have My HealtheVet premium accounts, mention that here. OR, if you are using a prototype tool that will not work well with screen readers, mention that as well.)

The pool of potential participants should be comprised of at least 25 individuals with the following demographic and user characteristics:

* + At least 5 aged 65 or older
  + At least 3 aged less than 35
  + At least 10 Veterans of any age who identify as women
  + At least 4 caregivers: Defined as an official or unofficial provider of support necessary for Veterans to complete activities of daily living. (May also be a Veteran)
  + At least 2 beneficiaries utilizing VA benefits as a dependent
  + At least 1 participant that identifies as being one who rarely uses or has never used VA phone numbers and call centers
  + At least 1 participant that identifies as being a frequent user of VA phone numbers and call centers
  + All participants should be able to join the interview using Zoom video and have a high-speed internet connection. If this is not an option, a longer session (90 minutes) should be scheduled to account for time to communicate input selections made by the participant on their dial pad.

1. **Secondary criteria / Would like to have** - what other criteria would strengthen your results?
   1. 3-5 people with recent experience (past 6-12 months) using VA call centers
   2. 3-5 people with no recent experience (12+ months) using VA call centers
   3. The next several questions will just help us customize the research to the participant. The responses will not disqualify anyone from participation.  
      “Have you used (the following benefits/services)?”
      1. “VA education benefits”
      2. “VA pharmacy services”
      3. “the VA Community Care program”
      4. “any VA service that required you to pay a bill”
2. What is your recruitment strategy? (If in person, describe how you will find participants. If remote, mention if you plan to draw from the existing recruiting contract - Perigean - or if there are other places where you would like to reach out to find participants specifically for this project. If you need help, please contact Research Contract Lead.)   
     
   The team plans to use Perigean to manage participant recruitment for this project in a manner that is consistent with the previous MCT efforts. All research will be conducted remotely using online collaboration tools and video conferencing software, which limits the pool of participants to those who can be recruited using digital tools. This aligns with Perigean’s methods and limitations and will not require additional outreach or strategy for recruitment.

**When?**

1. Timeline: What dates do you plan to do research?
   1. Week 1 of research: November 1-5
   2. Week 2 of research: November 8-12
   3. Week 3 of research: November 15-19
2. Prepare: When will the thing you are testing be ready? November 1st
3. Length of Sessions: 1-hour sessions with at least 30 minutes of buffer time between.
4. Availability: If applicable, when would you like sessions scheduled? **Please list exact dates and times in EASTERN Standard Time**.
   1. Monday – Wednesday 9-1PM or 3-6PM
   2. No more than 3 scheduled interviews per day
   3. At least 30 minutes between interviews
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?
   1. October 25th, with Stephen Arlington, Haley Rolince, and KT Gregory
6. Additional recruiting requests:
   1. Confirm in advance that each Veteran participant has access to a computer or laptop, with connection to the internet.
   2. Determine if participant is able and willing to use their webcam to show their hands pushing numbers on their dial pad.
   3. To reduce the no-show rate, please do the following:
      1. Text or email a reminder to each participant the morning of their interview.
      2. Call the Veteran to confirm if you do not hear back, or email address is invalid.

**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:
  + Stephen Arlingon ([stephen.arlington@va.gov](mailto:stephen.arlington@va.gov)),
  + KT Gregory ([katherine.gregory@va.gov](mailto:katherine.gregory@va.gov)) 828-400-0938
* Research guide writing and task development (usually but not always same as moderator): Stephen Arlington, KT Gregory, Haley Rolince
* Participant recruiting & screening: Perigean team
* Project point of contact: Kateleigh Clark ([kateleigh.clark@va.gov](mailto:kateleigh.clark@va.gov); 973-271-5889)
* Participant(s) for pilot test: Stephen Arlington, KT Gregory, Haley Rolince
* Note-takers:
  + Stephen Arlington ([stephen.arlington@va.gov)](mailto:stephen.arlington@va.gov)
  + KT Gregory ([katherine.gregory@va.gov](mailto:katherine.gregory@va.gov))
  + Haley Rolince ([mahala.rolince@va.gov)](mailto:mahala.rolince@va.gov)
  + Tasmia Moulvi ([tasmia.moulvi@va.gov](mailto:tasmia.moulvi@va.gov))
  + Kateleigh Clark ([kateleigh.clark@va.gov](mailto:kateleigh.clark@va.gov))
* Observers: **List email addresses for those who should attend and observe the sessions: VA Stakeholders, engineering team members, design team members, any other people who might find this research relevant to their work**. Please do not invite these observers. Only 1 or 2 will **attend each session. Our team is managing a signup sheet and will forward the invitation to the correct observers.** 
  + Kate Buker ([kate.buker@va.gov](mailto:kate.buker@va.gov))
  + Ahmed Kochaji ([ahmed.kochaji@va.gov](mailto:ahmed.kochaji@va.gov))
  + John Rocco ([john.rocco@va.gov](mailto:john.rocco@va.gov))
  + Tasmia Moulvi ([tasmia.moulvi@va.gov](mailto:tasmia.moulvi@va.gov))
  + Paula Stokes ([paula.stokes@va.gov](mailto:paula.stokes@va.gov))

**Resources**

* Project Charter:   
  <https://dvagov.sharepoint.com/sites/VACObcro/emd/Shared%20Documents/IVR%20Experience/VEO%20Project%20Charter%20-%20MCT%20IVR%20Experience%202021-09-07.docx?d=w1c28829e5dfe4827b69219bd8ddde388>