# **Research Plan for [Orchid, Virtual Agent, Jan.2021]**

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## **Goals**

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

*This is for the Virtual Agent Chatbot, team Orchid.*

1. Background: Briefly, what is the background on this product? What would a new person on the team need to know about this product?

*We are releasing an unauthenticated chatbot in Feb 2022 that will act as a new way to access information to the veterans, and an authenticated version in April 2022, that will provide personalization and features to access private information, such as claims and appeals status.*

*Understand the needs of Spanish speaking veterans and beneficiaries regarding trying to access information in the VA, how the needs for a chatbot differ for this group, and if there are any specific needs for this group.*

1. Research questions: What question(s) do you hope to be able to answer after completing this research?

Main question: *How do the needs for a chatbot differ for the Spanish speaking veterans?*

Profile:

* 1. *Who needs content in Spanish (veterans, beneficiaries, dependents, caregivers)?*
  2. *Do they use Spanish as a preferred language?*
  3. *Who (if anyone) depends solely on Spanish information?*

Needs:

* 1. *What information are they looking for?*
  2. *What tasks are they trying to complete?*
  3. *In which situations do they look for content in Spanish or a different language than English*
  4. *Is there a language barrier? Are there enough resources in Spanish at the VA?*
  5. *What do they do when they cannot find the information they need in Spanish?*

Chatbot / Technology:

* 1. *How would they interact with the chatbot? Translation?*
  2. *How would they expect to interact via mobile? (SMS, App based)?*
  3. *How do they currently interact through the VA?*
  4. *Would they use the chatbot in Spanish?*

1. Hypothesis: What is your hypothesis for this research?

* *Spanish speaking veterans, especially family members and caregivers would prefer a chatbot as a way of interacting with the VA, rather than via telephone.*
* *Spanish speaking veterans will have similar information needs than the English speaking onex: ex: Facilities, Claims and Appeals. Nevertheless, there can be expected challenges to access this information, as well as independent topics related to language related topics.*

## **Method**

1. What method of research are you planning?

* *Direct interviews*
* *remote moderated usability testing*

2. Why this method? How does this methodology help you answer your research questions?

With this methodology we would be able to explote where the needs match and differ between English and Spanish speaking veterans, moderated would allow us to dive deeper into certain topics by asking follow-up questions to the interview or tasks we ask them to complete

1. Where are you planning to do your research?
   1. Online, Perigean Zoom.
2. What will you be testing?
   1. We will be testing the current unauthenticated and authenticated version of
3. If remote: What tool do you plan to use (Zoom, GoToMeeting, Webex)
   1. Perigean Zoom

## **Participants and Recruitment**

1. Participant criteria: What are you looking for in a participant?

* *6 people.*
* *Primary Criteria:*
  + *Do you speak Spanish as your preferred language?*
  + *Have you interacted or need information from the VA in the last 2 years? (Website, calling)*
* *Secondary criteria:*
  + *Are you a family member or caretaker? (Would be interesting to get this perspective, as they are not required to a level of English language proficiency.*
  + *Have you used chatbots before?*

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.)
2. Secondary criteria / Would like to have - what other criteria would strengthen your results?

*Pro tips for writing recruiting criteria:*

* If you have specific screener questions that YOU would ask a potential participant to determine eligibility for your study, list them here. For example, instead of saying "We want someone who has been to an urgent care facility recently", say "Have you been to an urgent care facility in the last 6 months? (Answer should be yes)"
* Do not assume that your recruiters or the participants know your products or requirements as well as you do. Provide links to products, clear descriptions, specifics, etc.

1. What is your recruitment strategy?

*The plan would be to draw from Perigean.*

## **When?**

1. Timeline: What dates do you plan to do research? (IF you are using the research recruiting contract, please submit 1 FULL week prior to the start of research for remote, 2+ weeks for in person.)

*24 - 28 of January 2021*

1. Prepare: When will the thing you are testing be ready? (Goes without saying, but should be a few days before testing will begin.)

*17-19 January 2021*

1. Length of Sessions: How long do you estimate each session will be? (This helps with scheduling & thank you gifts.)

*1 hour with buffer time*

1. 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. Specify how much time you want between sessions, if any.

Monday - Friday 9:00 to 6:00 pm CEST, 15 min between sessions

1. 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?

*January 19, 2021*

Member: Contact Eunice from BAH?

## **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

* Moderator: Pilar Moreno
* Research guide writing and task development (usually but not always same as moderator): Pilar Moreno
* Participant recruiting & screening: Perigean
* Project point of contact: Shane Strasberg / Pilar Moreno
* Participant(s) for pilot test: TBH
* Note-takers: Patrick Onesty, Eunice Garcia (maybe) and Luciana Morais
* 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

| | //Pending email of Danielle Thierry and Eunice Garcia  Alina.murphy@thoughtworks.com | | --- | | ian.santarinala@thoughtworks.com | | Jacob.gacek@thoughtworks.com | | shane.strassberg@omb.eop.gov | | Aditya.Sharma@thoughtworks.com | | shane.strassberg@va.gov | | luciana.morais@va.gov | | Joe.hall@thoughtworks.com | | luciana.a.moraisusds@gmail.com | | Kha.Huynh@thoughtworks.com | | Tanya.Randstoft@thoughtworks.com | | Justin.trieu@thoughtworks.com | |  | |
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## **Resources**

* Project Brief: *Project brief should live in the appropriate va.gov-team product folder, simply paste a link to it here*
* Convo Guide *Discussion guide should live in the appropriate va.gov-team product folder, simply paste a link to it here*
* Synthesis *Link to any documents used for synthesis (Mural or Realtimeboard boards, excel sheets, other data outputs, etc.)*
* Lessons Learned *Did you have any takeaways from the process of this research round that you want the team to remember for the future? Document them here.*
* Read-Out/Results
  + *Read-out presentation should live in the appropriate product repo and folder; paste a link to it here.*
  + \*\* Don't forget to add a link to your research folder to the research tracker! <https://github.com/department-of-veterans-affairs/va.gov-team/blob/master/platform/research/research-history.md>