



Citizens Advice

Understanding the behaviour and motivations of Citizens Advice advisers.



March - April 2023
1 month

USER INTERVIEWS STORYBOARDING
USER JOURNEYS

Background

Context

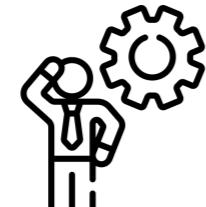


Advisers at Citizens Advice struggle to find services available locally to citizens
Advisers at Citizens Advice (CA) are increasingly taking calls from citizens from other parts of the country. They struggle to find information on services available locally to citizens.



Only 5 weeks
A 5-week project contract meant we had to onboard, get moving, and present back in very short timeframes.

The Ask

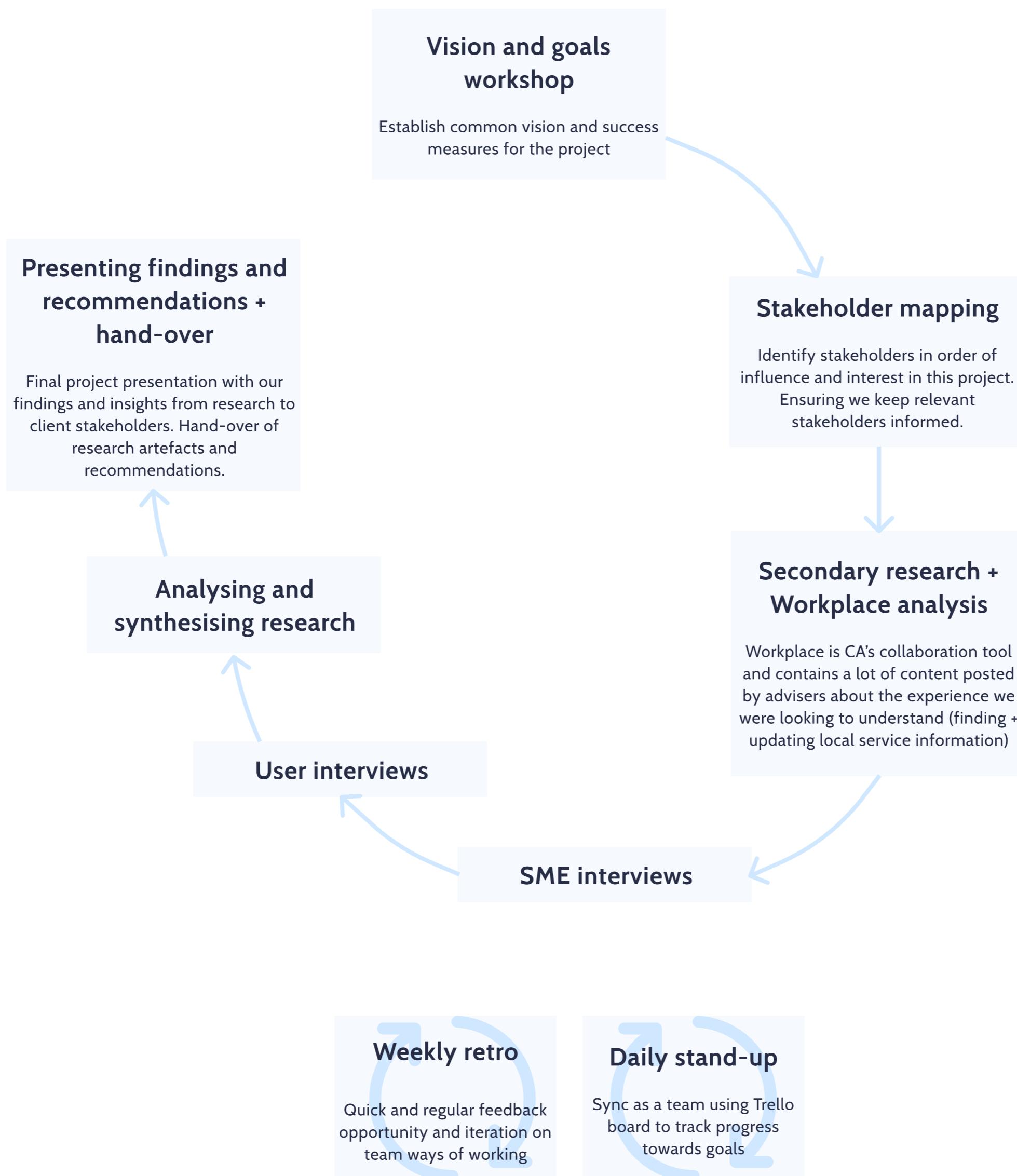


Understand pain points in accessing and updating local service information
Why are editors not keeping internal tools up to date? What are the sources of local service information for advisers?



Understand user journeys in accessing and updating local service information
What are the journeys for advisers looking for local service information, and for editors updating it?

My approach



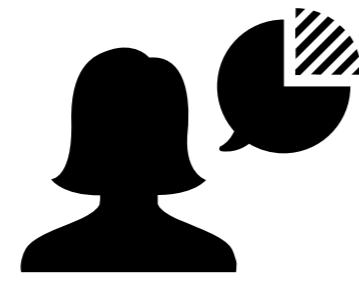
User research and other sources of insight



4 User Interviews

My first action on this project was to start lining up user interviews since this tends to have significant lead time.

Early on, it became clear that the vast majority of participants (CA advisers and editors) were not responding to our invitations to interview, despite being chased by our CA PO. This is due to advisers being very busy and ongoing tension between advisers and being burdened by too many requests from the national organisation.



3 SME interviews

To adapt, I reached out to Subject Matter Experts (SME's) within CA, to gather any information from them on finding and updating information on local services. These were 1-hour sessions with SME's at CA. This helped inform our hypotheses for research, which we could prove/disprove from our user interviews.



Secondary research + screenshots from Workplace

Additionally, we worked closely with the user research team at CA to make sure we analysed and understood any relevant existing research.

We also found a goldmine of information in the Workplace posts. Workplace is Facebook for the workplace, and includes a treasure trove of user attitudes towards finding local service information. We found a lot of valuable pain points here.

1. Planning research

Planning research questions and hypotheses as a team. Informed by SME interviews, secondary research and Workplace.

Behavioural Questions	
'Show and tell me ...'	Can you show us how you would refer a client?
Other new opening LSS, what would you do if you were asked to update it quickly?	How would you get information to someone from your local office?
Other new opening LSS, what would you do if you were asked to update it quickly?	How would you get information from the local service?
Can you show us how you would catch up with a task?	Can you show us how you would catch up with a task?
Shows an example of where you have used internal roles, what would you do if this was used?	Can you show us how you would catch up with a task?
How many CA interviews have you open at once?	How many CA interviews have you open at once?

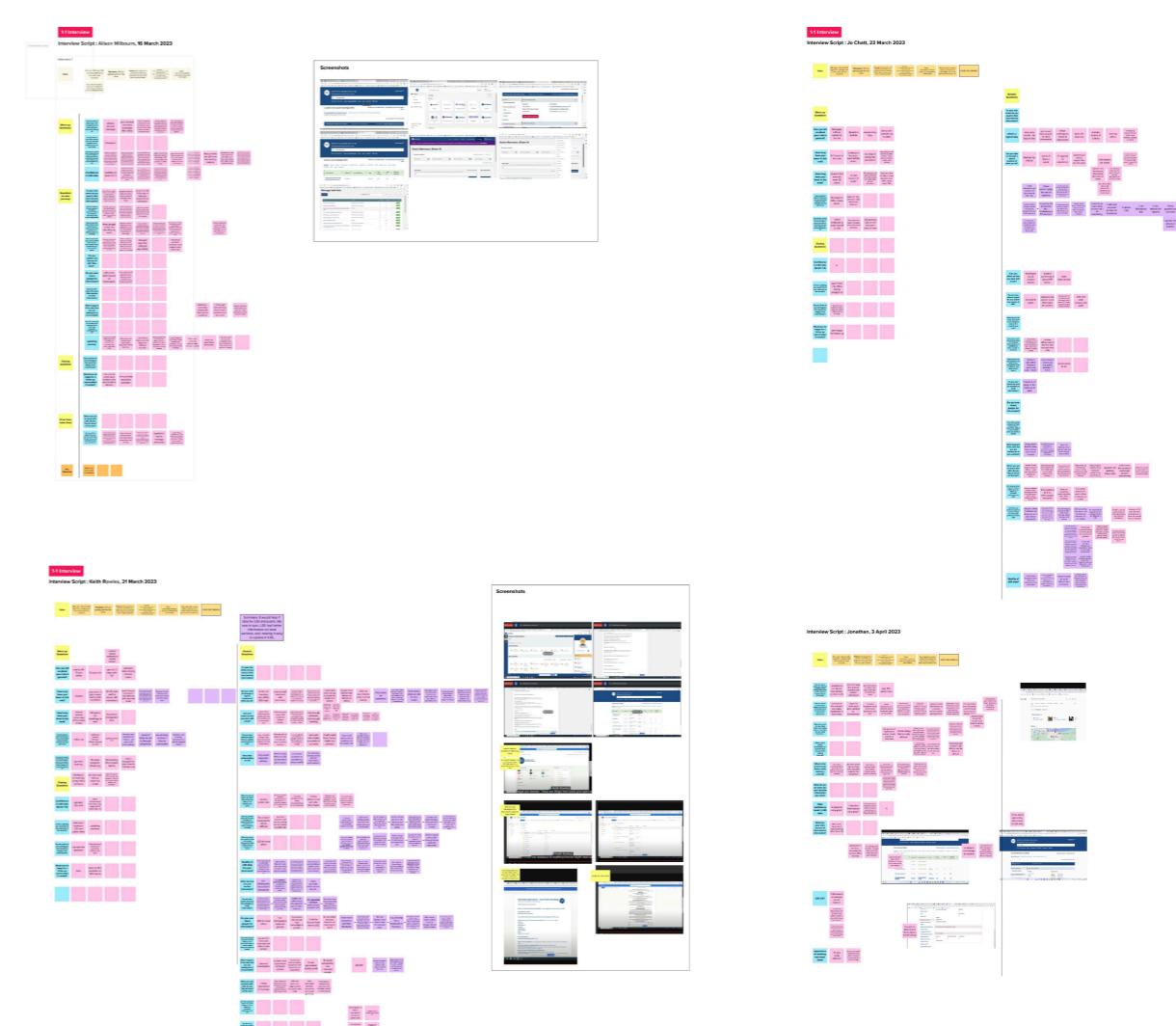
Motivation-based Questions	
"How do you feel about ..."	Searching for offices in LSS
Receiving tasks on your work list	Receiving tasks on your work list
Receiving tasks on your work list	How do you feel about the amount of time spent on LSS to search for information compared to using another site?
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Situational Questions	
"What would you do if ..."	You form a partnership with a new local partner
You receive a referral from another office that you can't support	You receive a referral from another office that you can't support
What happens if the data that you're looking for is not available?	You could see that a local office is changing the opening hours of your office
What happens if the data that you're looking for is not available?	The partner information in LSS and Referrals is different
What happens if the data that you're looking for is not available?	What would you do if a piece were missing?

Skills-based Questions	
"How would you ..."	Have you been asked to provide information about the local service to a client?
How would you ...	How would you teach how to use Casebook/LSS/Referrals?
How would you ...	How long have you been working at this role?

2. Building interview guide and taking interview notes

Building out a discussion guide to the interviews based on planning. It's important in these exploratory interviews to allow for diversion from the script during interviews. That way we can adapt to what participants are saying. Then, the note taker takes notes for the facilitator, directly in Mural in this case.

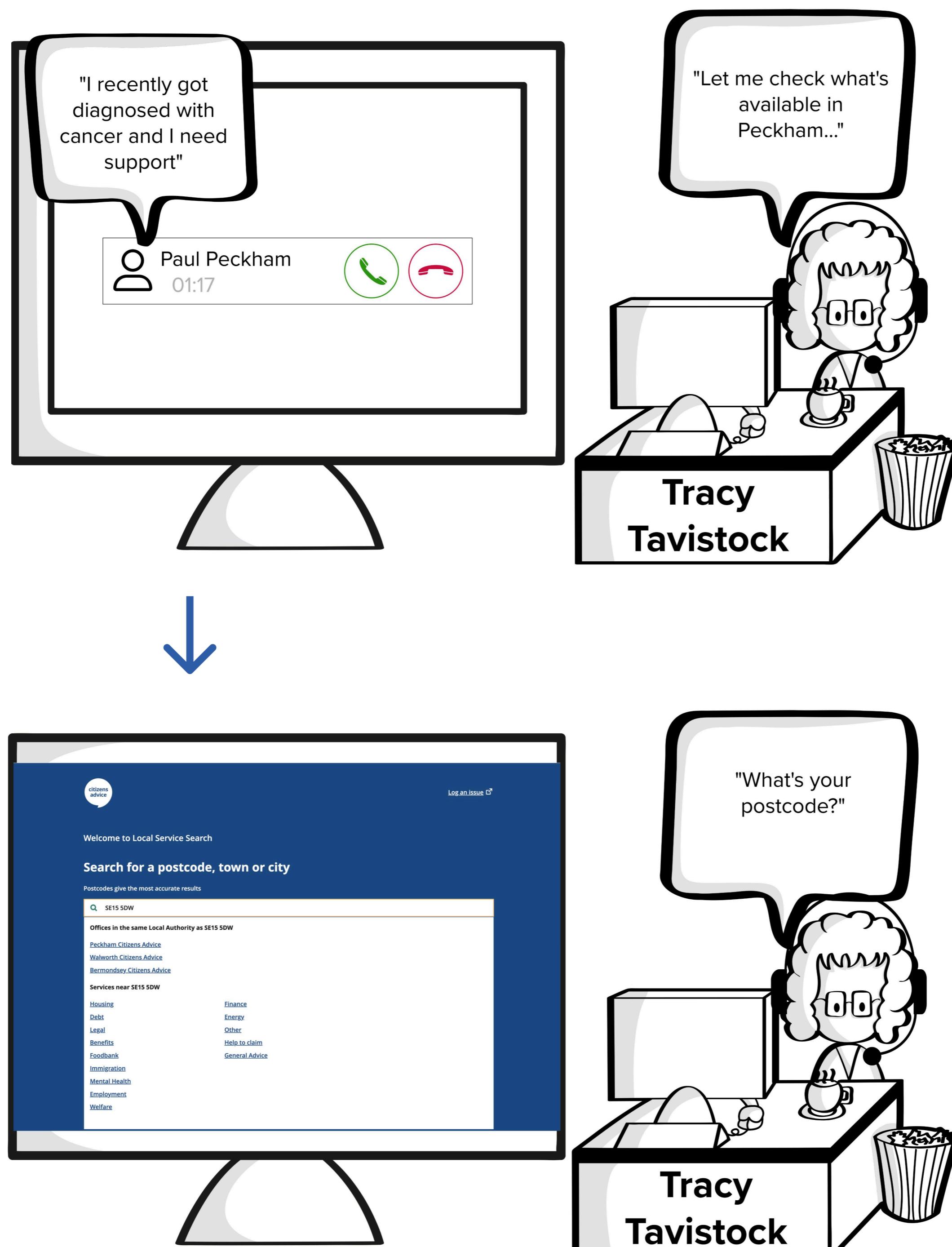


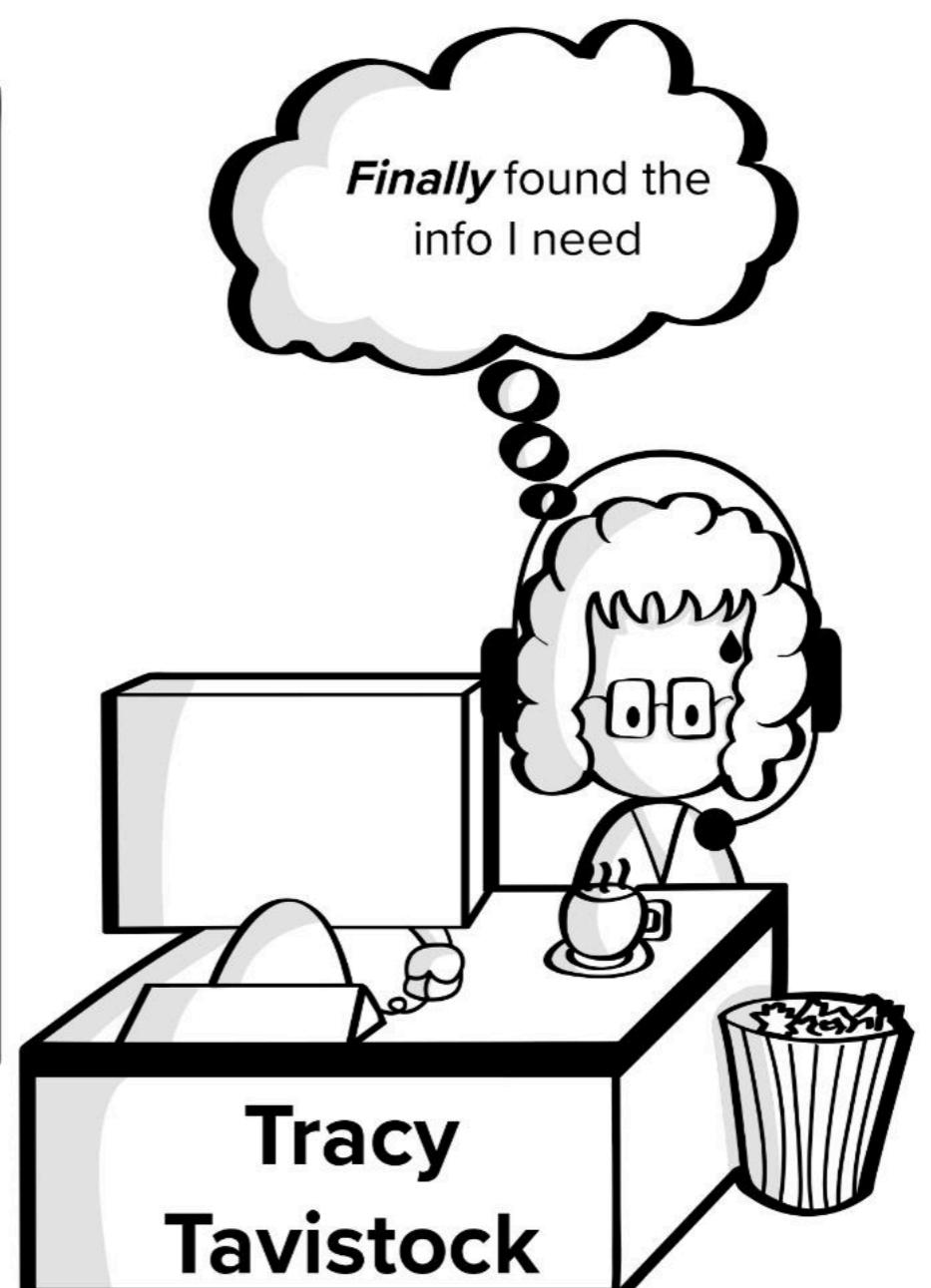
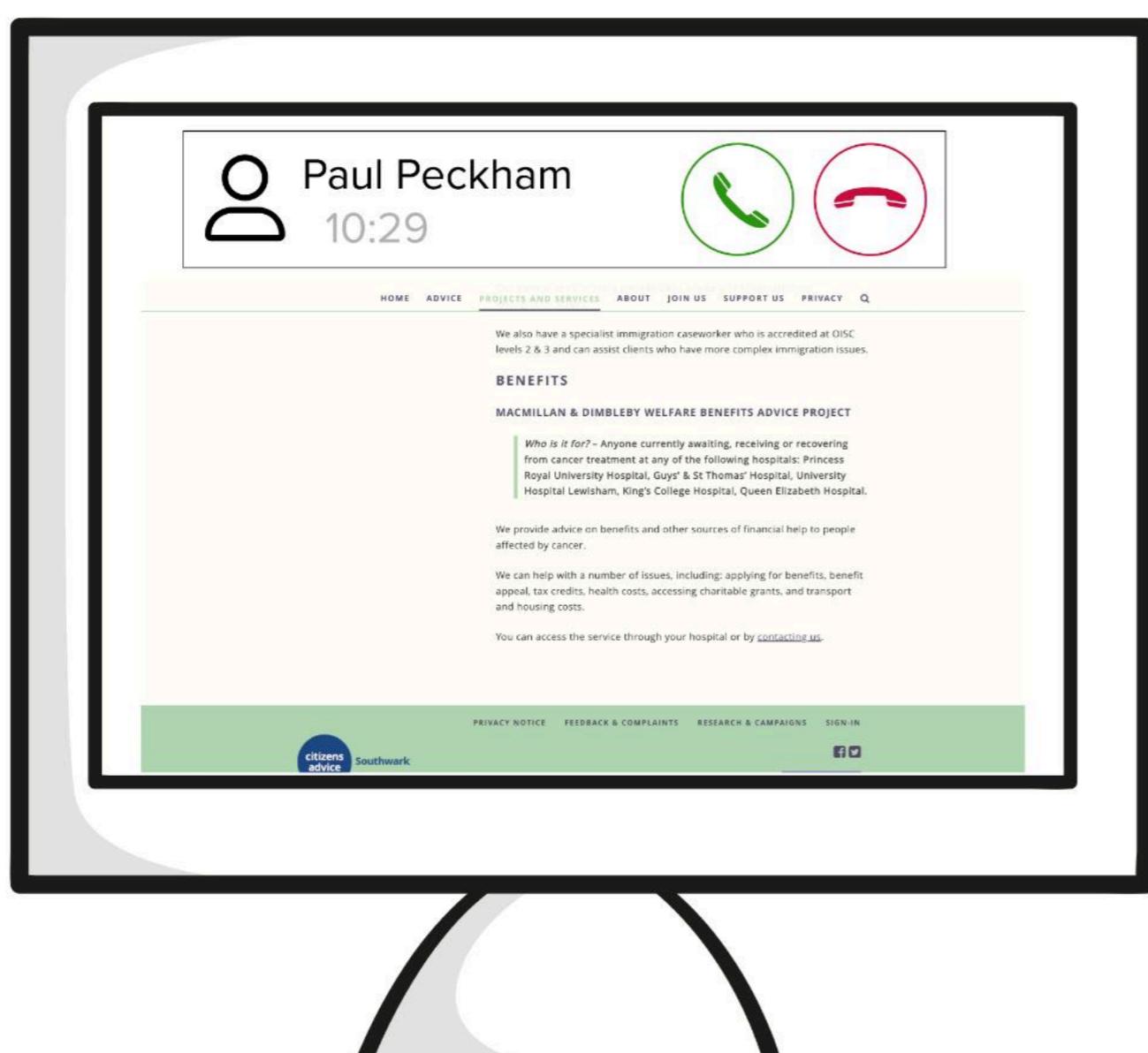
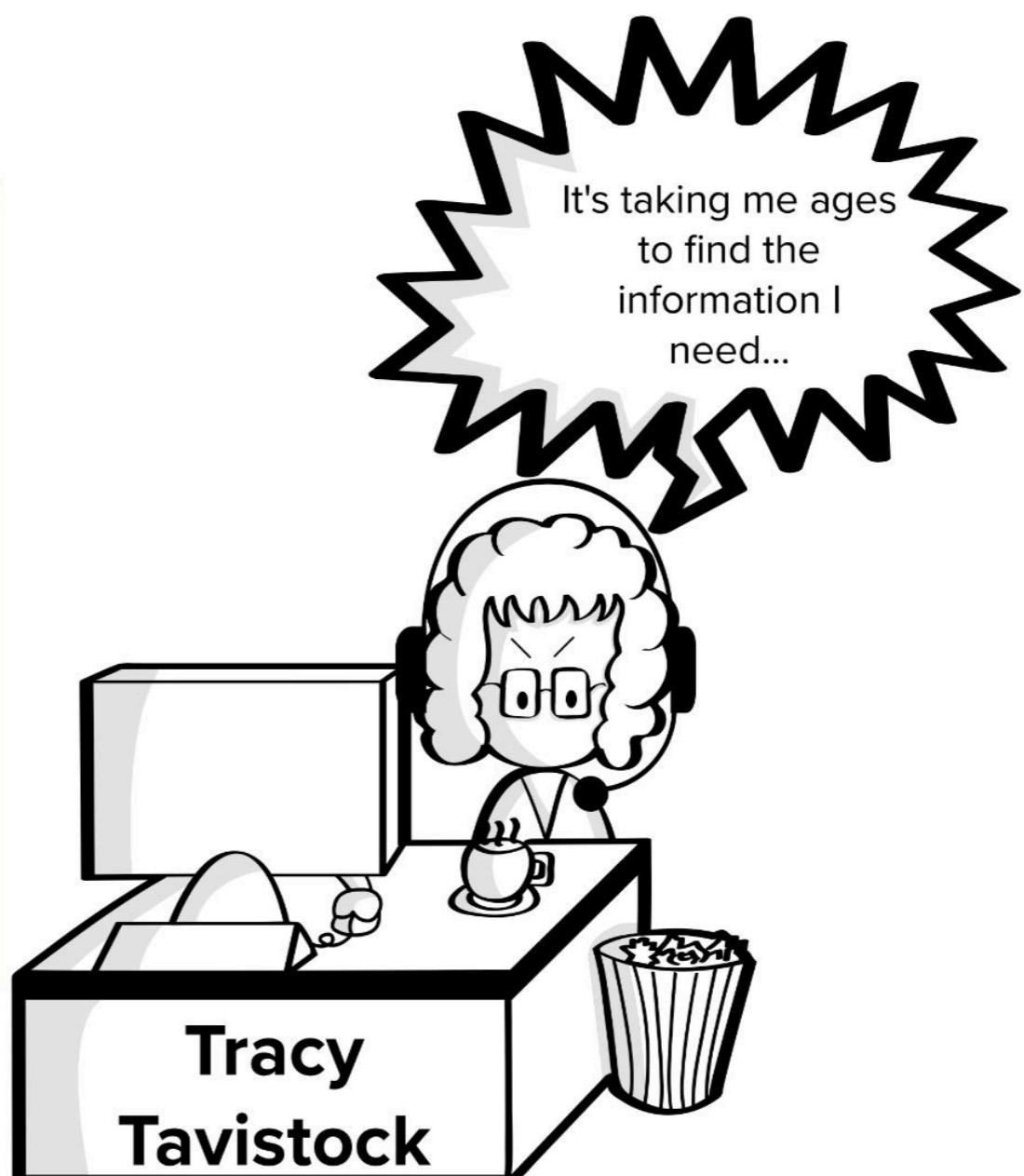
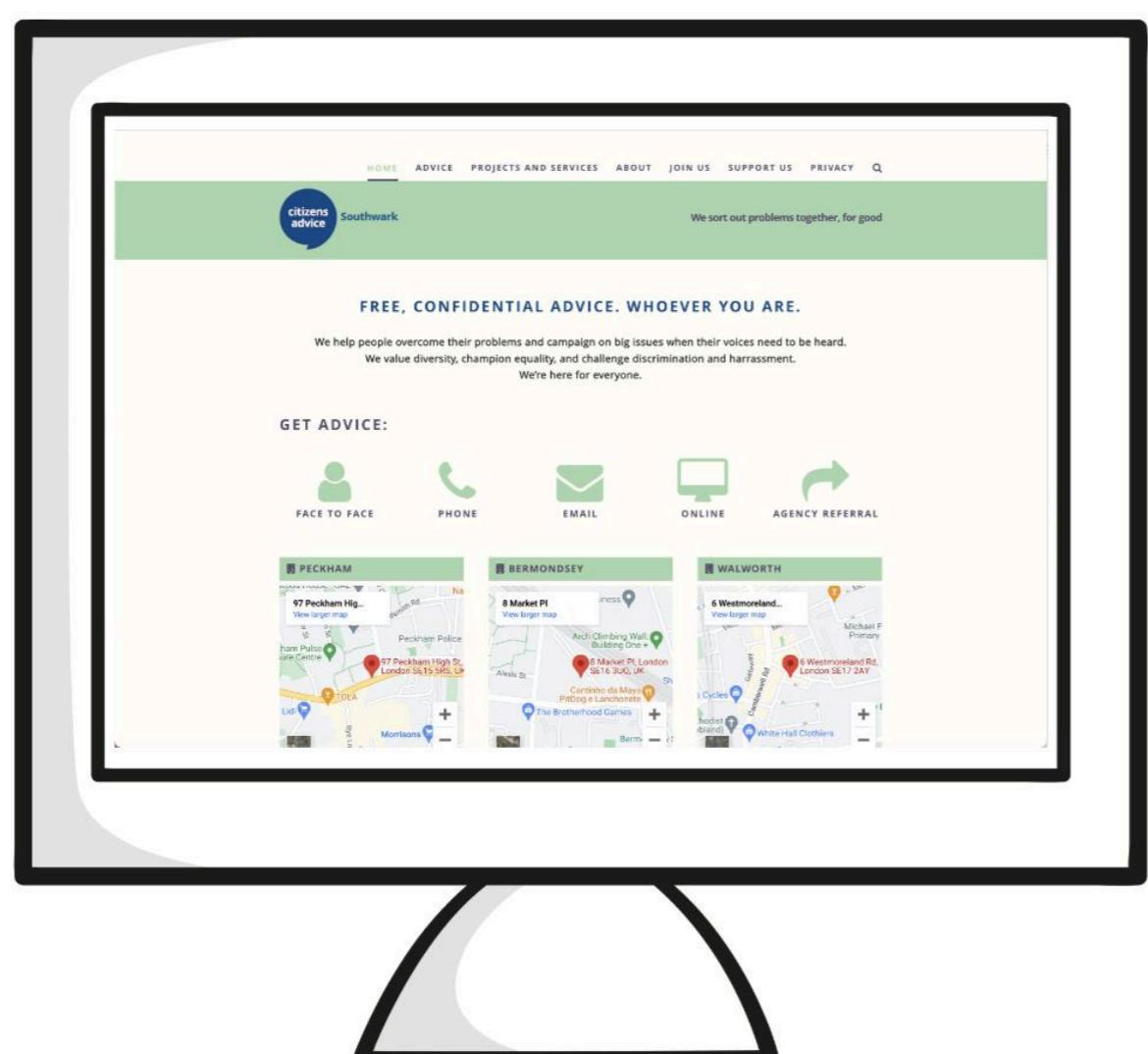
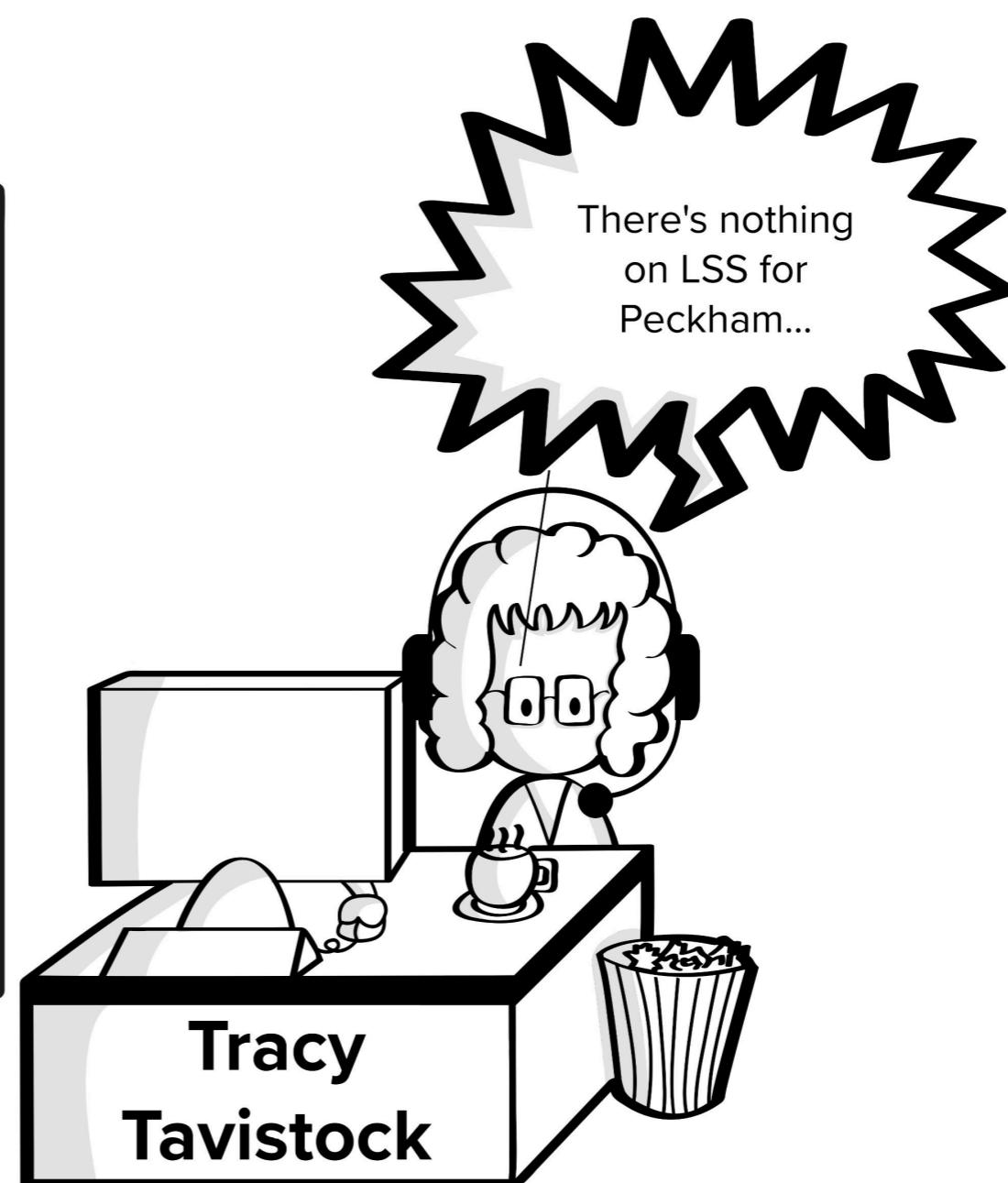
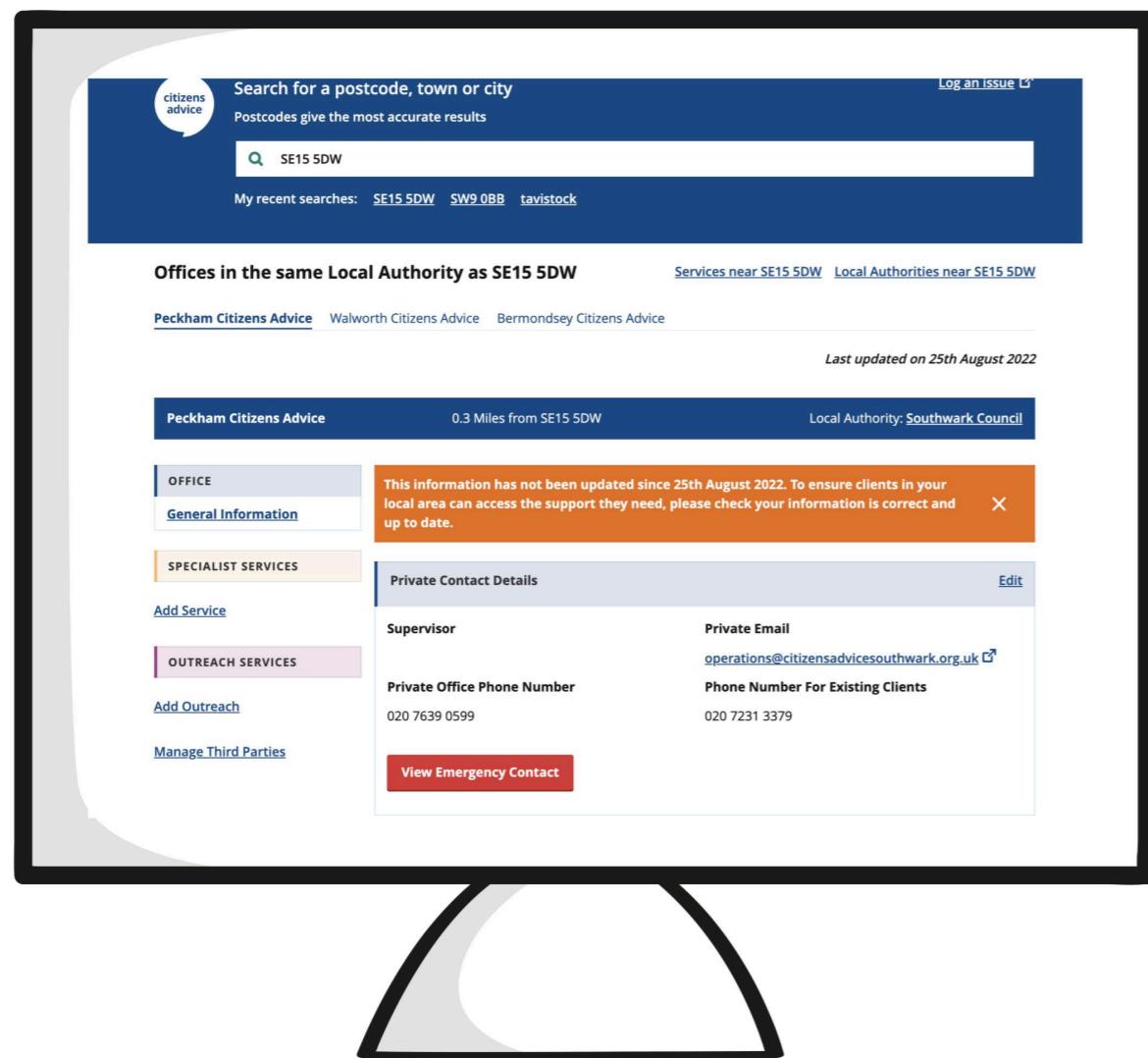
Storyboards

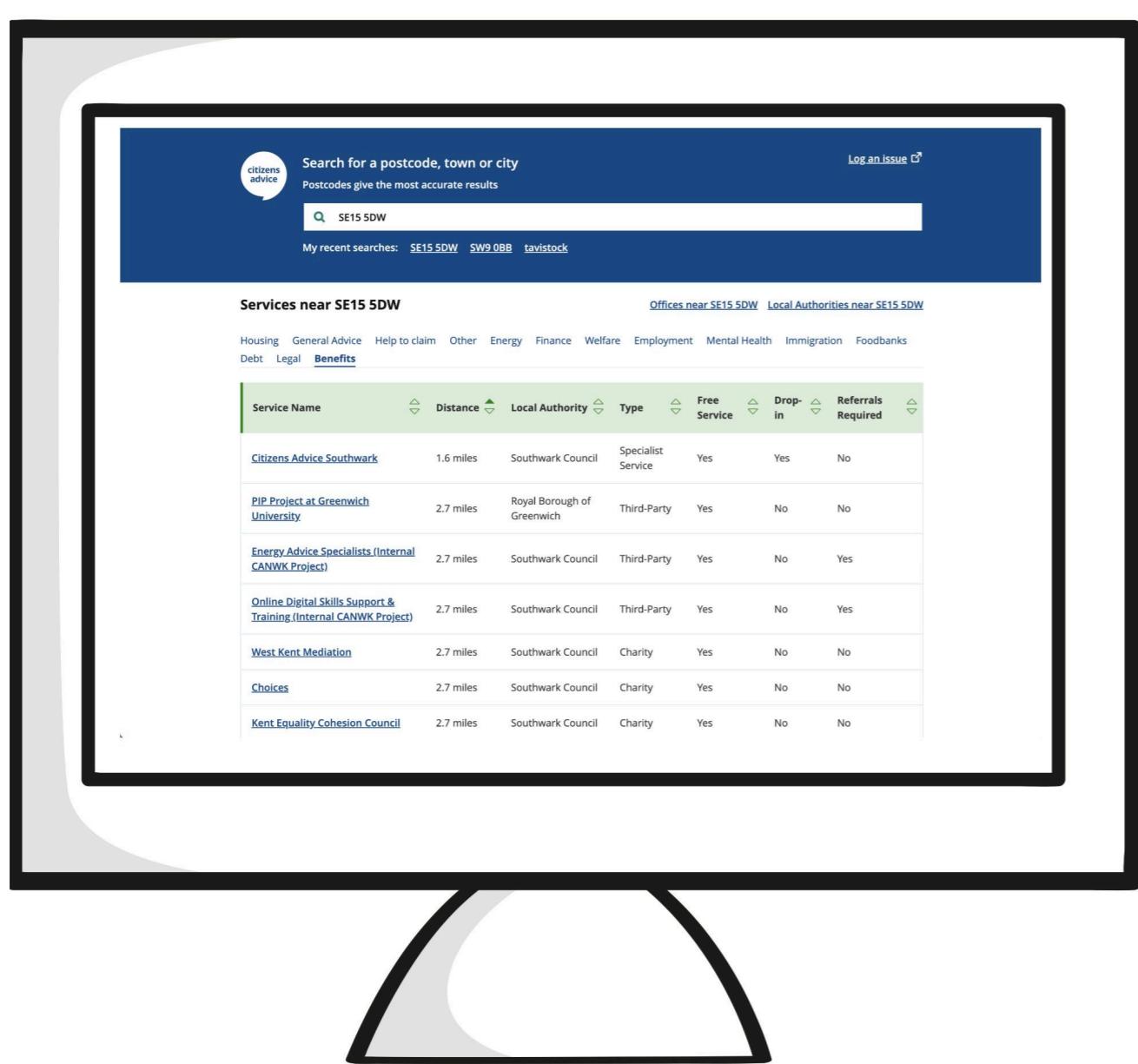
In our vision and goals workshop, I defined a goal with the client of creating an **artefact that summarises the pain points** for an adviser, and the same for an editor. The purpose of the artefact is that anybody could pick it up and understand the pain points for that user group. I.e. what are the pain points advisers experience in finding local service information, and for editors in updating information.

I created easy-to-understand storyboards that are visual and show the pain points in **the context of the user journey** - you can see the pages where the users are having issues on the screen, and when in their journeys they encounter those problems. This was very effective for **creating user empathy**.

For example, this is the storyboard I produced for the **adviser** user group:







Project feedback



Willem - the storyboards were brilliant.

Lead Business Analyst



Fantastic stories produced in a short space of time.

Product Owner



Thanks to the Thoughtworks team, this has been really informative!

User Researcher