



# Citizens Advice

Understanding the behaviour and motivations of Citizens Advice advisers.

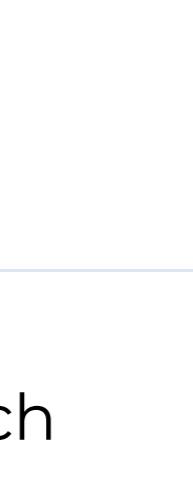
March - April 2023  
1 month

USER INTERVIEWS   STORYBOARDING

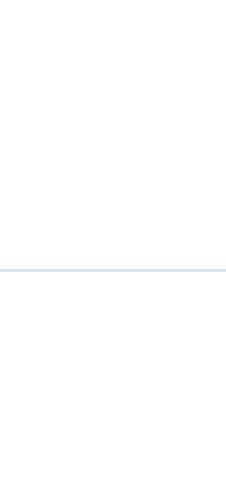
USER JOURNEYS

## Background

### Context

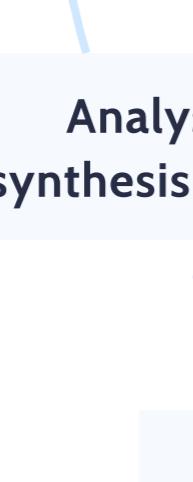


Advisers at Citizens Advice struggle to find services available locally to citizens. Advisers at Citizens Advice (CA) are increasingly taking calls from citizens from other parts of the country. They struggle to find information on services available locally to citizens.



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

### The Ask

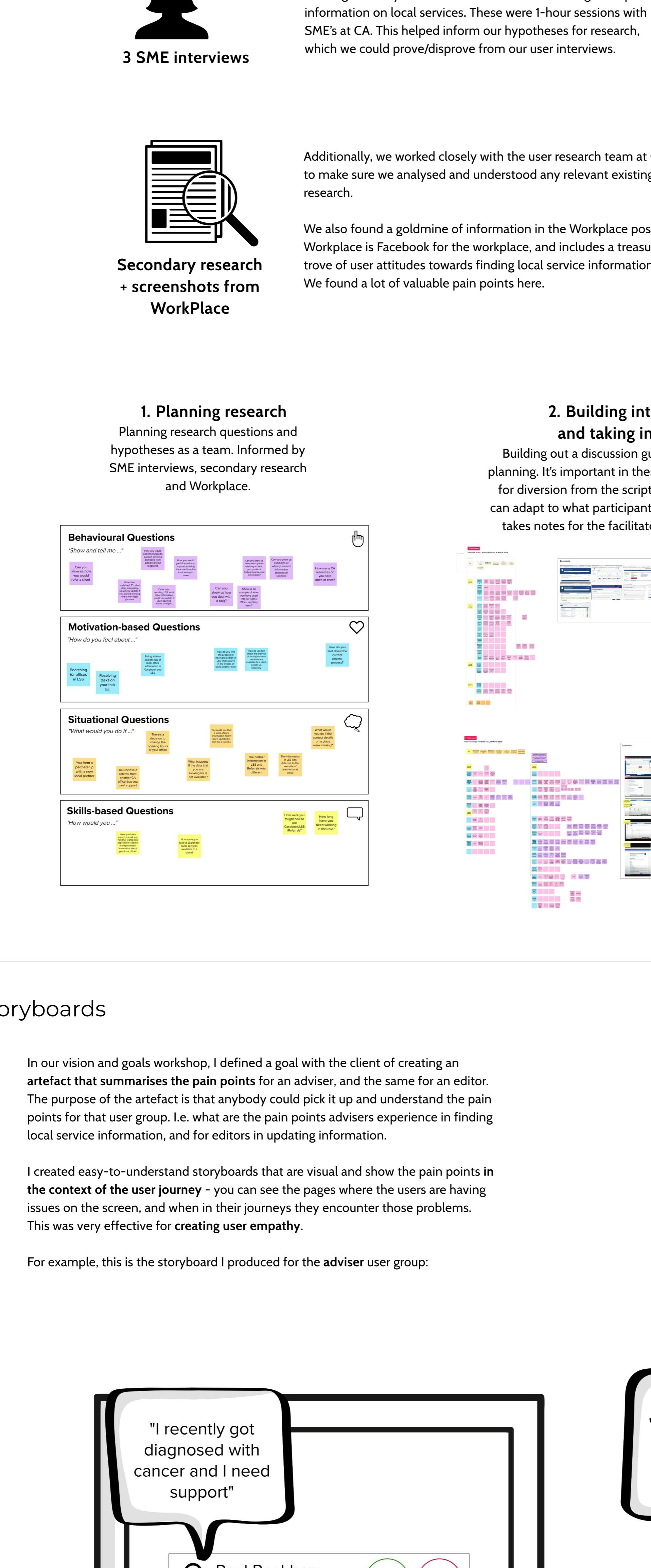


Understand pain points in accessing and updating local service information  
Why are editors not keeping internal tools up to date? What are the sources of local service information for advisers?



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

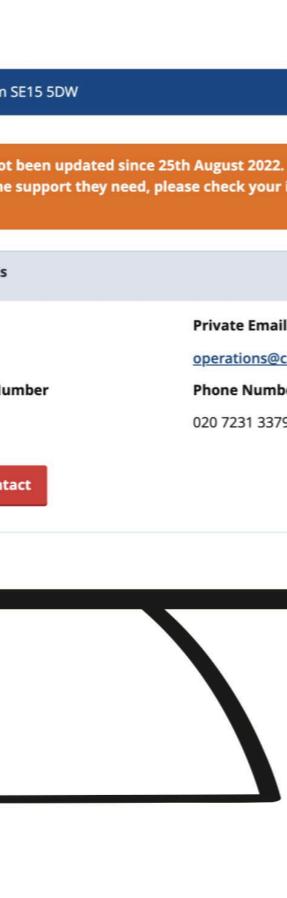
My first action on this project was to start lining up user interviews since this tends to have significant lead time.

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.



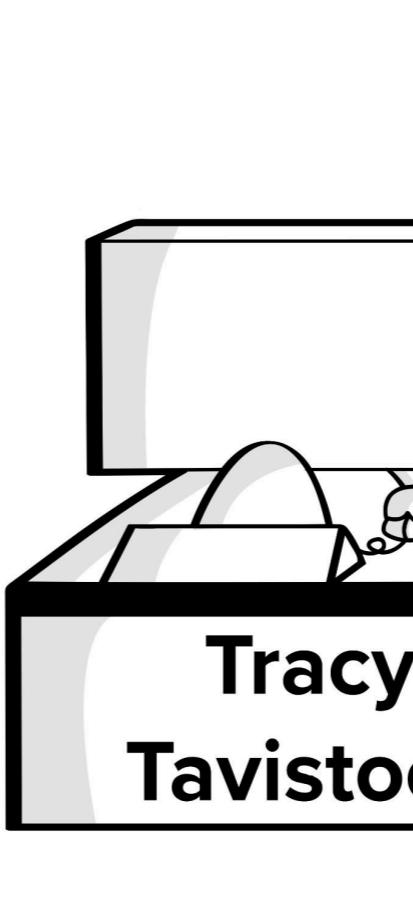
### 1. Planning research

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



### 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.

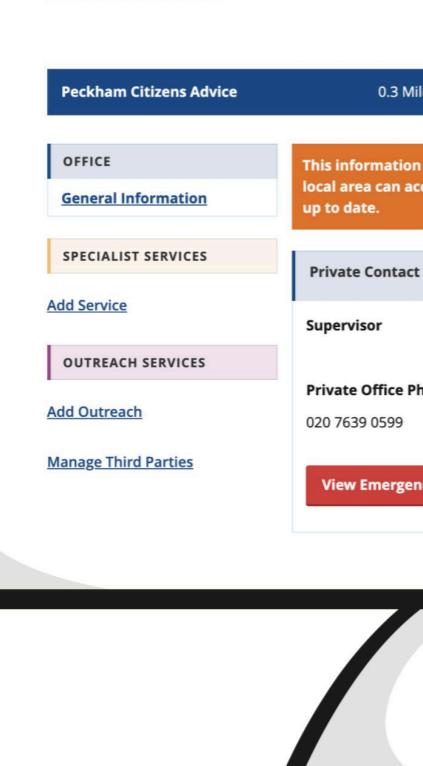


### Secondary research + screenshots from Workplace

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.

### 3 SME interviews

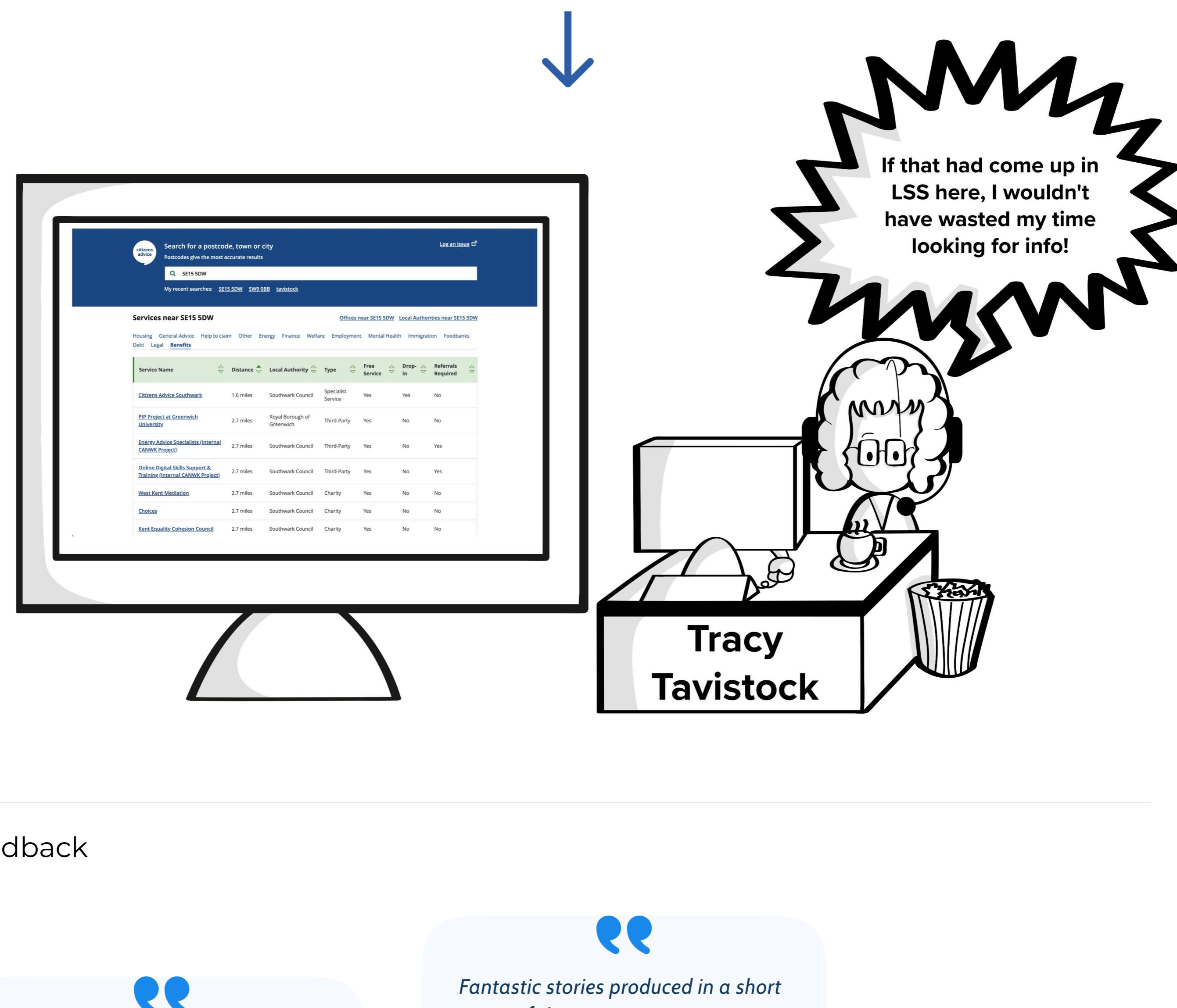


## Storyboards

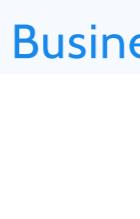
In our vision and goals workshop, I defined a goal with the client of creating an artefact that summarises the pain points for an adviser, and the same for an editor. The purpose of the artefact is that anybody could pick it up and understand the pain points for that user group. i.e. what are the pain 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:



## 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