



User Research Summary Report

Chatbots - Oxford City Council



User Research Summary Report

Contents

- **Introduction**
- **Executive summary**
- **Training and on boarding**
- **Research methodology and findings**
- **Conclusion**

User Research Summary Report

Introduction

Local councils want to adopt new ways of working to triage inbound enquiries to reduce the burden on call centres, improve services for their customers and become more efficient. Chatbots and AI present an opportunity to help solve these challenges.

However, local councils currently lack shared understanding of best practices in the development and delivery of chatbots to serve customer needs. This lack of knowledge and process presents the risk of inappropriate solutions being developed.

Torchbox developed a framework for local councils to evaluate whether Chatbot and AI technology should be considered to help increase efficiency, improve the user experience and reduce the burden on call centres - with the ultimate aim of developing a robust business case.



User Research Summary Report

Introduction

This report focusses on the **user research** element of this project and is part of a wider programme of work. A summary of the full project activities and conclusions may be found in our final report:

- Project Summary Report | April 2019 | Council Chatbots | Torchbox.

If you want to read all of our findings in detail please refer to our reports:

- ROI Analysis and Market Summary | April 2019 | Council Chatbots | Torchbox
- Technology Landscape Review | April 2019 | Council Chatbots | Torchbox
- Example Shared Architecture | April 2019 | Council Chatbots | Torchbox
- Case Studies | April 2019 | Council Chatbots | Torchbox

A blog has been published by the project lead, Neil Lawrence of Oxford City Council. To read articles covering each stage of the project please visit the blog [here](#).

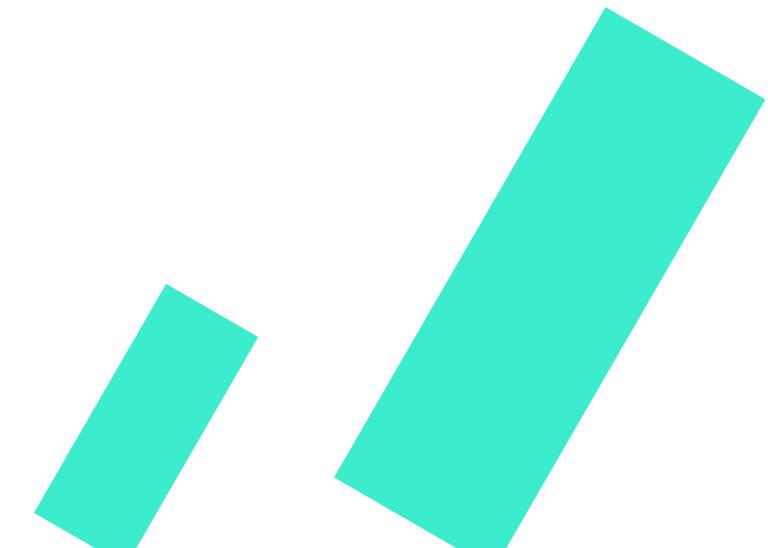


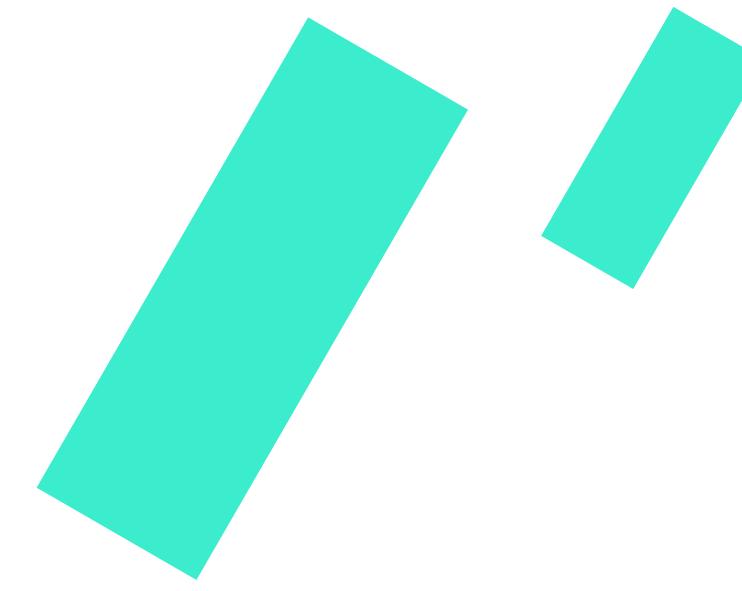
User Research Summary Report

Executive Summary

All findings are based on user interviews conducted within the four research areas in the respective selected councils.

Supplementary research was also provided by additional participating councils to either validate or challenge findings.





Executive summary

Nature of each service

➤ **Planning**

A complex and subjective topic requiring human assistance to progress through typically long experiences. Users will engage with the council to progress or check progression of a task.

➤ **Revenues and benefits**

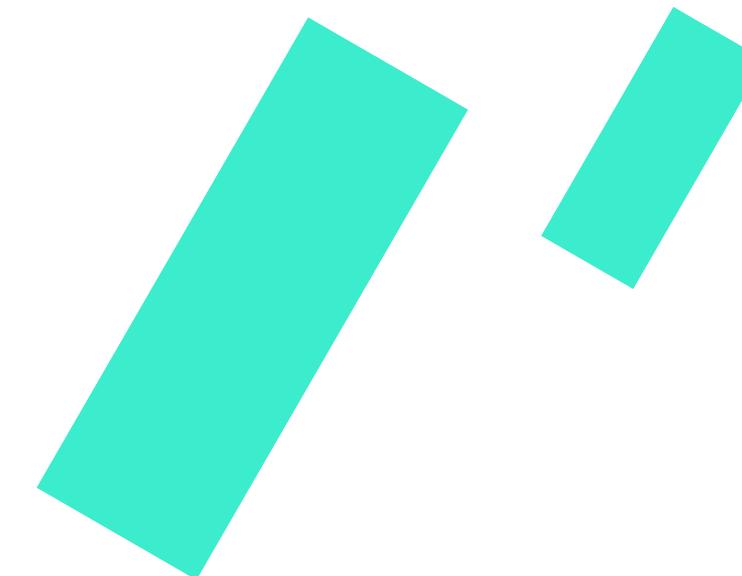
This emotional and complex topic requires certainty, guidance and reassurance as it is a service that can significantly affect people's lives and finances. Users will not hesitate to call for clarity and support.

➤ **Waste and recycling**

A simple topic which can be easily resolved by both self service and quick interactions with the council. Poor service has a significant impact on people's lives, increasing propensity for calls to the council.

➤ **Highways**

A varied topic with a wide range of tasks - with more emotional interactions than expected due to its health and safety nature. Users will call to discuss complex urban planning concerns or to check progression of a report, request or query.



Executive summary

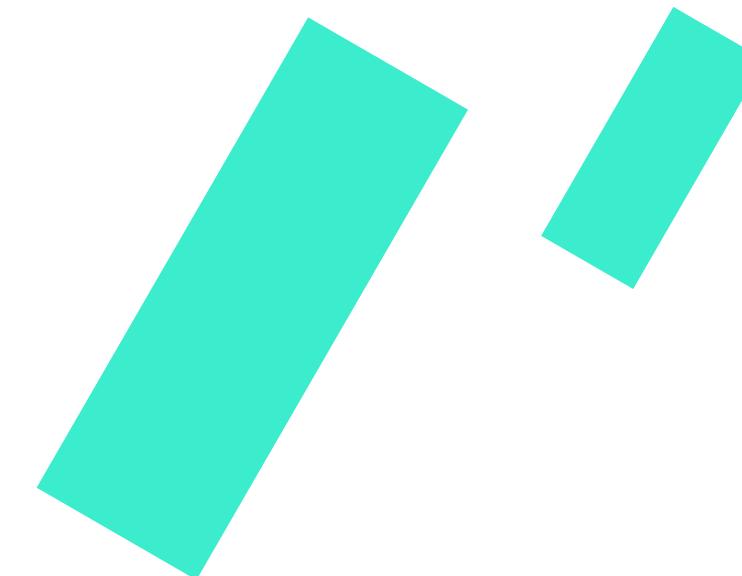
Key user needs

Throughout our research sprints we identified universal user needs that were present in each service area.

Generally speaking, **users want to feel heard**. They want to feel like their voice has value. However, they understand that there are limited resources and they don't expect to always get their way, but they do expect, at least, a response.

Users have **high expectations led by the modern service industry**. They expect communication turnaround times to be short and customer support teams to be knowledgeable and caring. However, they also understand that government services are limited in resources and don't expect staff to work late.

Ultimately, **users need to feel safe in the hands of the council**, particularly as they do not have a choice. There is no competitor that they can switch to if the council does not meet their expectations.



Executive summary

Calling the council

Factors which contribute to calls to the council:

► **Is the task urgent?**

If a user is dealing with an urgent the task, the higher the need to speak to someone and get reassurance that it will get resolved.

► **Is the task unfamiliar?**

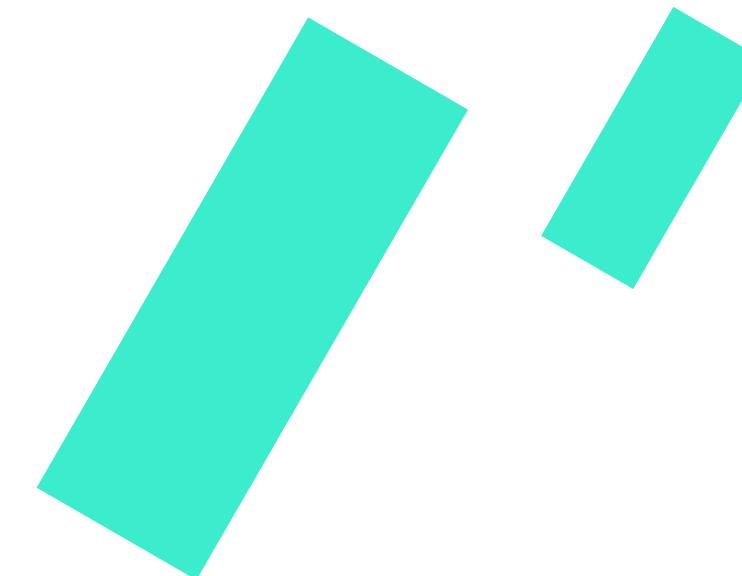
If dealing with a new or unfamiliar process, and if the information or ability to self-service is not available or easily accessible, then users will not hesitate to pick up the phone.

► **Is the task complex?**

If users cannot quickly or easily self serve or complete a task - if they require Council assistance, guidance or authentication - they are more likely to pick up the phone or use a blend of channels over a long period of time.

► **Is the task emotional?**

If a user is emotional or distressed it will either be necessary to get additional assistance or reassurance over the phone. But sometimes, users just want to voice their feelings - particularly if they are angry, frustrated or resentful.



Executive summary

Forces influencing behaviour switch

Forces that are blocking change:

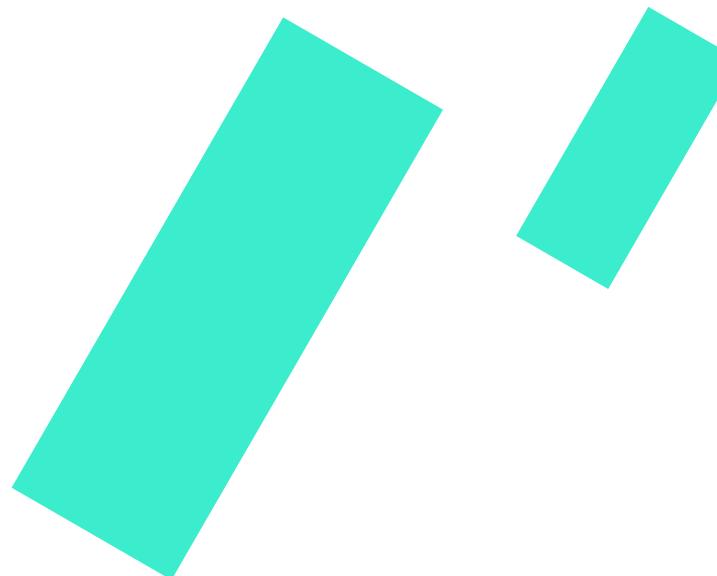
Habit: Users find that picking up the phone is easy and familiar. It is the channel that enables them to communicate with the least amount of effort.

Anxiety: Users fear that other channels might not enable them to communicate as effectively, that they won't feel as valued, they might not know how to use another communication tool (talking is second nature) or that ultimately, other channels will take longer to get their job done.

Forces promoting a new choice:

Situational push: Users are pressed for time, they want to self serve, they need to get a job done outside working hours. They need to find information or complete a simple task.

Appeal of new solution: Users would like an easy and accessible way to self serve to solve simple tasks and information requests. Users would like to be notified of important information to avoid needing to call or reach out to the council.



Executive summary

Informing UX principles

User needs and current experiences can inform user experience (UX) principles that should guide future design decisions and technology selection when considering a Chatbot solution.

User needs:

- To get a 'job' done
- To feel heard and valued
- To have an informed answer
- To feel safe

User experiences can be:

- Urgent
- Complex
- Unfamiliar
- Emotional

UX principles:

- Ease, Speed & Responsiveness
- Self service & Accessibility (24/7)
- Proactivity, Information & Alerts
- Trust, Reassurance & Accountability

User Research Summary Report

Training and on boarding

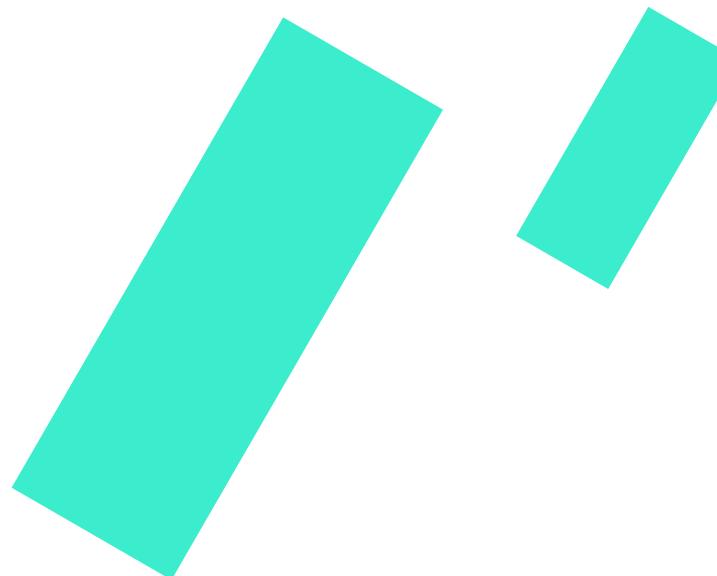
How to carry out **user research** in order to develop and deliver products and services that serve customer needs.



Training and on boarding

“When designing a government service, **always start by learning about the people who will use it.** If you don’t understand who they are or what they need from your service, you can’t build the right thing.”

gov.uk



Training and on boarding

Introduction

This project had the dual purpose of conducting user research with four chosen councils per research area, and training Councils to conduct their own user research.

Torchbox focussed on **one location per research area** across four research sprints, with other councils doing their own user interviews, following the methods shared during training for consistent project outputs.

Planning

- Oxford
- Hertsmere
- Cheltenham

Waste and recycling

- North East Derbyshire / Bolsover
- Rotherham
- Doncaster

Revenues and benefits

- Redditch & Bromsgrove
- Preston
- Adur & Worthing

Highways

- Surrey

Training and on boarding

User research training

- We conducted user research training at two locations, with representatives from **13 councils**.
- During training, we covered an introduction to user research values and methodologies, with a strong focus on **user interviews**.
- We shared training materials and provided the councils with a **framework, templates and tools** to conduct user interviews.
- You can find a PDF copy of our user research training slides [here](#).

Training and on boarding

Purpose of research in a discovery phase

- To identify and explore the current experience of people who want to do the task your service provides.
- To use interviews and visits to explore relevant aspects of their lives and work.
- Have a detailed map that presents the current experience of likely users, descriptions of different types of users (eg: personas) and a set of needs for different types of users.
- To get the service team involved in research during discovery / talking to users from the beginning helps everyone understand the problems you're trying to solve.

Training and on boarding

Research aims for this project

- To understand the user experience of customer support in each research area - user motivations, triggers, frequency of access, success and pain points.
- To understand users' mental models and terminology used during communication, search and navigation. Are there regional variances?
- To understand user experience of, and attitude towards, digital channels and technology. For example: social media, communication channels and chatbots / automated services.

Training and on boarding

Templates and tools

- All councils were instructed to collect, analyse and synthesise data using the shared templates. This **saved time** during tight project timescales and allowed us **speak a common language** when sharing learnings and insights.

Consent form

Interview Script

Context

Let's start off by learning a

Could you please tell me h

Could you describe your h

What do you do for a living

Would you say you have pl
not related to work?

Would you say you have th

Motivations

*Imagine we are here to make a documentary about your experience with customer service for your local (research theme) services. We will ask you questions to help us identify the key scenes in y
scenes to life. We might as
understand things from you.*

When was the last time(s)
theme)?

Was this a one-off or is thi

If regular; how often? Is th

If a one-off; what triggered
remember when you had t

What were you hoping to .

Why was this important to

Was there time pressure?
time?

If you could not complete

Experience of service

How long was it between that trigger moment and actually accessing the service?

How did you access your council's (research theme) service? (phone, website, in person, other...?) What did you look for?

Let's talk through your experience, step by step. What did you do first?

For each of the key steps or stages in the customers' experience, use the following questions:

How long did this take? How long between this and the next step?

At this point, what adjective would you use to describe your experience?

How were you interacting with your council? (phone, website, in person, other...?)

When did you do this (time of day, week, month)? How long did this take?

Pain points:

Did you experience any inconvenience or frustration at this point? Big or small?

Context					
Age	Occupation				
Household	Customer Experience Map				
	Step 1	Step 2	Step 3	Step 4	Step 5
Motivations	Actions (Info - Task - Complex)				
Last time accessed service					
One off / regular?	Channel(s)				
Initial trigger?					
Hoping to do / achieve					
Enable to / desired outcome	Time / duration				
Time pressure?					
Impact if not complete					
Customer Language / Terminology					
Emotional: Positive					
Emotional: Neutral					
Emotional: Negative					
Requirements for progression					
Surprise / Delight					
Barriers / Frustrations					
Success / Job completion					
Opportunities for improvement					
Attitudes to Technology					
Preferred way to contact others:				Preferred way for others to contact them:	
Which one sounds more valuable to you:					
Option A				Option B	
Waiting a few hours to have in-depth chat with customer support				Being able to get high level information and support 24/7	
Being able to contact someone to get the help you need				Being able to self-help with available resources	
The ability to text and online chat with customer services				The ability to call and speak to customer services	
How regularly do use the Internet?	Never	Sometimes	Regularly	Always	
Home					
Work					
On the go					
How regularly do use the Internet for these purposes?	Never	Sometimes	Regularly	Always	
To communicate with people					
To find information					
For shopping					
To consume media					
For personal admin					
How strongly do you agree or disagree with the following statements?	Strongly disagree	Disagree	Agree	Strongly agree	
I enjoy using technology					
Technology intimidates and threatens me					
I am eager to try new technology					
I avoid using technology when I can					
Without my smartphone, I would struggle to get personal admin done					
Without my laptop or desktop, I would struggle to get personal admin done					
I prefer speaking to a human, I hate texting / emailing					
I prefer having paper copies of everything, I hate digital documents...					

User Stories					
Stage 1		Stage 2		Stage 3	
I want to	I want to	I want to	I want to	I want to	I want to
So I can	So I can	So I can	So I can	So I can	So I can
Acceptance Criteria:	Acceptance Criteria:	Acceptance Criteria:	Acceptance Criteria:	Acceptance Criteria:	Acceptance Criteria:
I want to	I want to	I want to	I want to	I want to	I want to
So I can	So I can	So I can	So I can	So I can	So I can
Acceptance Criteria:	Acceptance Criteria:	Acceptance Criteria:	Acceptance Criteria:	Acceptance Criteria:	Acceptance Criteria:
Experience map					
I want to	User Needs	I want to enter text here So I can enter text here	I want to enter text here So I can enter text here	I want to enter text here So I can enter text here	I want to enter text here So I can enter text here
So I can		▶ Enter text here ▶ Enter text here ▶ Enter text here	▶ Enter text here ▶ Enter text here ▶ Enter text here	▶ Enter text here ▶ Enter text here ▶ Enter text here	▶ Enter text here ▶ Enter text here ▶ Enter text here
Acceptance Criteria:		USE ICONS PROVIDED DEVICE CHANNEL			
		"Enter quote here"	"Enter quote here"	"Enter quote here"	"Enter quote here"
		USE ICONS PROVIDED	USE ICONS PROVIDED	USE ICONS PROVIDED	USE ICONS PROVIDED
		▶ Enter text here ▶ Enter text here ▶ Enter text here	▶ Enter text here ▶ Enter text here ▶ Enter text here	▶ Enter text here ▶ Enter text here ▶ Enter text here	▶ Enter text here ▶ Enter text here ▶ Enter text here
	Emotional	"Enter quote here"	"Enter quote here"	"Enter quote here"	"Enter quote here"
		USE ICONS PROVIDED	USE ICONS PROVIDED	USE ICONS PROVIDED	USE ICONS PROVIDED
	Pain Points	▶ Enter text here ▶ Enter text here ▶ Enter text here	▶ Enter text here ▶ Enter text here ▶ Enter text here	▶ Enter text here ▶ Enter text here ▶ Enter text here	▶ Enter text here ▶ Enter text here ▶ Enter text here
		▶ Enter text here ▶ Enter text here ▶ Enter text here	▶ Enter text here ▶ Enter text here ▶ Enter text here	▶ Enter text here ▶ Enter text here ▶ Enter text here	▶ Enter text here ▶ Enter text here ▶ Enter text here
	Compelling forces	▶ Enter text here ▶ Enter text here ▶ Enter text here	▶ Enter text here ▶ Enter text here ▶ Enter text here	▶ Enter text here ▶ Enter text here ▶ Enter text here	▶ Enter text here ▶ Enter text here ▶ Enter text here
		▶ Enter text here ▶ Enter text here ▶ Enter text here	▶ Enter text here ▶ Enter text here ▶ Enter text here	▶ Enter text here ▶ Enter text here ▶ Enter text here	▶ Enter text here ▶ Enter text here ▶ Enter text here
	Research Theme: Council				

Training and on boarding

Sharing in Show & Tells

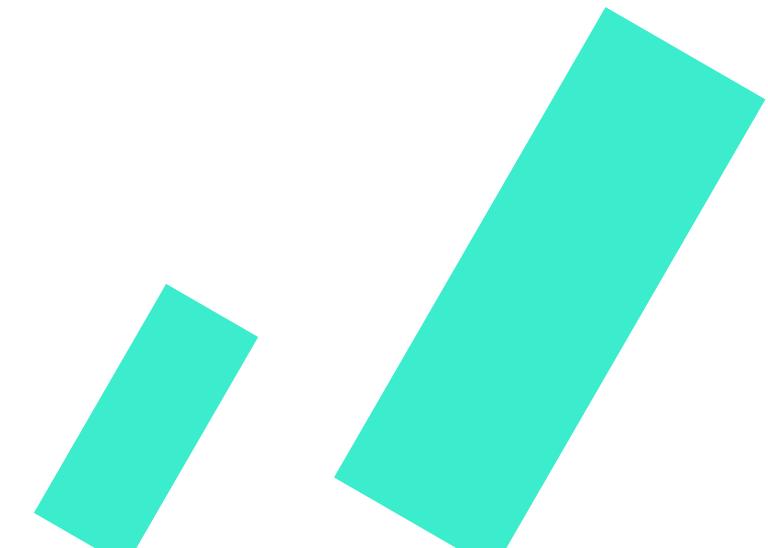
- We held weekly Show and Tells with the participating councils to provide a highlight of that week's key research findings.
- We were able to consistently share findings and hear insights from other participating councils - to either align or challenge each other's findings.
- We also used this opportunity to relate experiences and reflect on key points of learning regarding the user research process.



User Research Summary Report

Research Methodology & Findings

The research methodology and framework were devised to capture user insights to add to the wider programme of work. These would help to either validate or challenge data analytics and stakeholder interviews for each council.



Research Methodology & Findings

Methodology

We followed a repeatable process across four research sprints to uncover customer needs in each council service area.



Methodology

Research Sprints

Below are the relevant times, service themes and locations for each research sprint. Other councils also contributed supplementary user research data.

11/03/2019	18/03/2019	25/03/2019	01/04/2019
Planning	Waste & Recycling	Revenues & Benefits	Highways
Torchbox conducted user research at these locations:			
Oxford	NE Derbyshire	Redditch & Bromsgrove	Surrey
The following councils conducted their own user research:			
Hertsmere Cheltenham	Bolsover Rotherham Doncaster	Preston Adur & Worthing	

Methodology

Research Sprints

This project was set up so that Torchbox would conduct four x four day research sprints. A fixed schedule was set up and this process was repeated across the four weeks.

	1	2	3	4	5
	Monday	Tuesday	Wednesday	Thursday	Friday
Torchbox	Interviews & Analysis	Interviews & Analysis	n/a	Analysis & Synthesis	Reporting & Demo
Council *	Interviews & Analysis	Interviews & Analysis	Analysis	Analysis & Synthesis	Demo

** Other councils doing their own user research could conduct their research as and when they could, so long as data synthesis and documentation could be shared ahead of our weekly show and tells.*

Methodology

Research Sprints

We allowed an hour per user interview followed by half an hour of post interview analysis. This enabled us to analyse findings whilst insights were fresh in our minds and improve efficiency during a tight four day sprint.

Monday		Tuesday	
10:00 - 11:00	User Interview	10:00 - 11:00	User Interview
11:00 - 11:30	Mini Analysis	11:00 - 11:30	Mini Analysis
11:30 - 12:30	User Interview	11:30 - 12:30	User Interview
12:30 - 13:00	Mini Analysis	12:30 - 13:00	Mini Analysis
Lunch : 13:00 - 14:00			
14:00 - 15:00	User Interview	14:00 - 15:00	User Interview
15:00 - 15:30	Mini Analysis	15:00 - 15:30	Mini Analysis
15:30 - 16:30	User Interview	15:30 - 16:30	User Interview
16:30 - 17:00	Mini Analysis	16:30 - 17:00	Mini Analysis

Methodology

User recruitment

As this project was operating under tight timescales, user recruitment was one of the biggest challenges we faced - particularly for the first research sprint.

User recruitment requirements per sprint:

- ▶ Minimum of six - maximum eight users
- ▶ Face to face - alternatively, phone interviews
- ▶ £60 gift voucher was recommended as an incentive to boost appeal and decrease risk of no shows
- ▶ Any channel recommended for recruitment - posters, social media, marketing emails - so long a varied group of participants were recruited.

Methodology

User interviews

Scripts were set up to uncover insights on:

- ▶ Experience of service - step by step, successes and pain points
- ▶ Motivations - triggers and desired outcomes
- ▶ Access of service - time and frequency of access
- ▶ Mental models - terminology used by customers
- ▶ Channels - preferred and used
- ▶ Technology - the experience of and attitudes towards

Consent forms were devised for users to either:

- ▶ Consent to this particular research only
- ▶ Consent to being part of future research *

** This enables councils to engage with these users for future user research. By building a cohort of users who are interested in taking part in research, it can save time in finding relevant participants in future research projects.*

Methodology

User interview data

User interview data was analysed and synthesised using the templates shared during training. To document the end-to-end user journey for each service area, we:

► Documented user needs with user stories

To communicate what users want to do, and why they want to do it

As a... [which type of user has this need?]

I need/want/expect to... [what does the user want to do?]

So that... [why does the user want to do this?]

► Visualised experience maps

To communicate key findings that map out a user's experience of a service, including:

- User Needs
- Tasks
- Channels & Devices
- Emotional state
- Pain Points
- Compelling forces

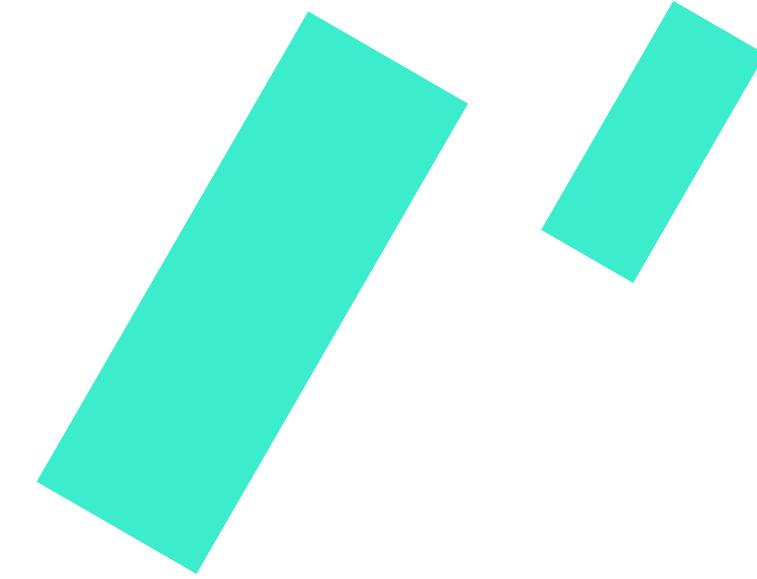
Research Methodology & Findings

Research Areas

Our research sprints focussed on:

- Planning
- Waste and recycling
- Revenues and benefits
- Highways





Research Limitations

Recruitment:

The councils were able to recruit users representing a range of ages, physical ability and socio-economic background.

However, given the tight timeframes on this project, most users were either people with irregular work patterns, self-employed, part time employees, unemployed or retired - thus, having the flexibility to take part during working hours.

Council-specific user insights:

The user insights found in this report are specific to the chosen leading councils for each research area.

During weekly show and tells we ascertained that variances in user insights were mostly due to
1) councils' operational delivery, and
2) broad topics with user insights being drawn from six to eight user interviews.

However, councils still shared key findings, trends and patterns regarding user needs.



Planning in Oxford

Chatbot Project User Research



Key Findings

- **Six user interviews** based in Oxford. Five face-to-face and one over the phone.
- **Two key journeys identified:** 1) Users who are managing their own planning application, and 2) Users who are checking or challenging someone else's planning application.
- Both journeys involve **complex and subjective** interactions and exchanges.
- In both journeys, there are **high stakes** and users are generally very invested. However, challenging a planning application is a more 'emotional' journey from the outset.
- Web and self help are the first port of call - however, if users are **stuck, confused or need reassurance they will not hesitate to call.**

User Quotes

About contacting the council...

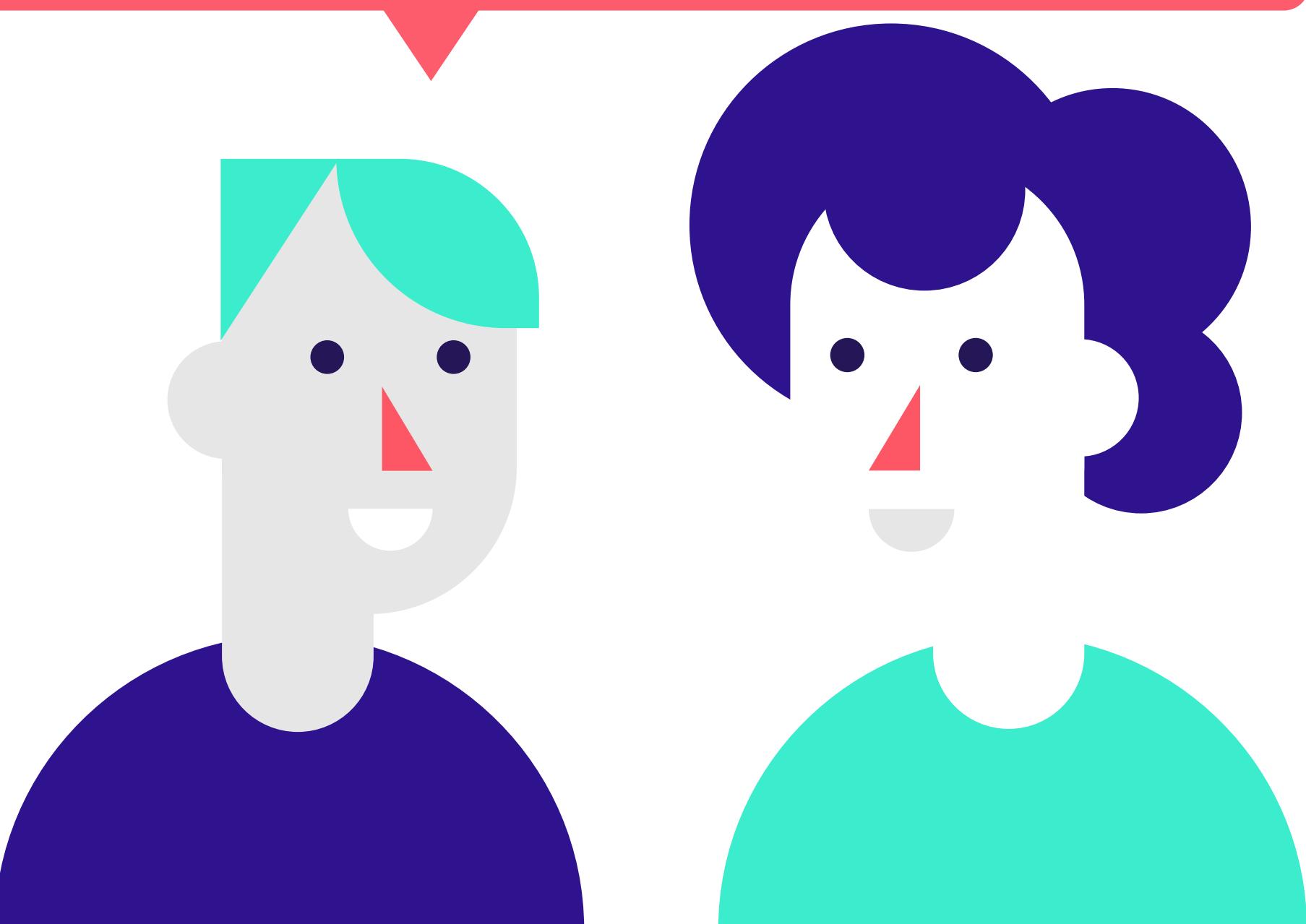
"I wouldn't need to phone if someone actually answered my emails!"

"The council might or might not call, it's unsettling. If I call them I can find out sooner."

"I would rather wait to speak to customer services, so long as waiting means you get the right information the first time round"

"Being able to call 24/7 seems unrealistic, but at least until 7pm"

"I would prefer to speak with someone... but as a council tax payer and as an economist, I understand speaking isn't always possible"



User Quotes

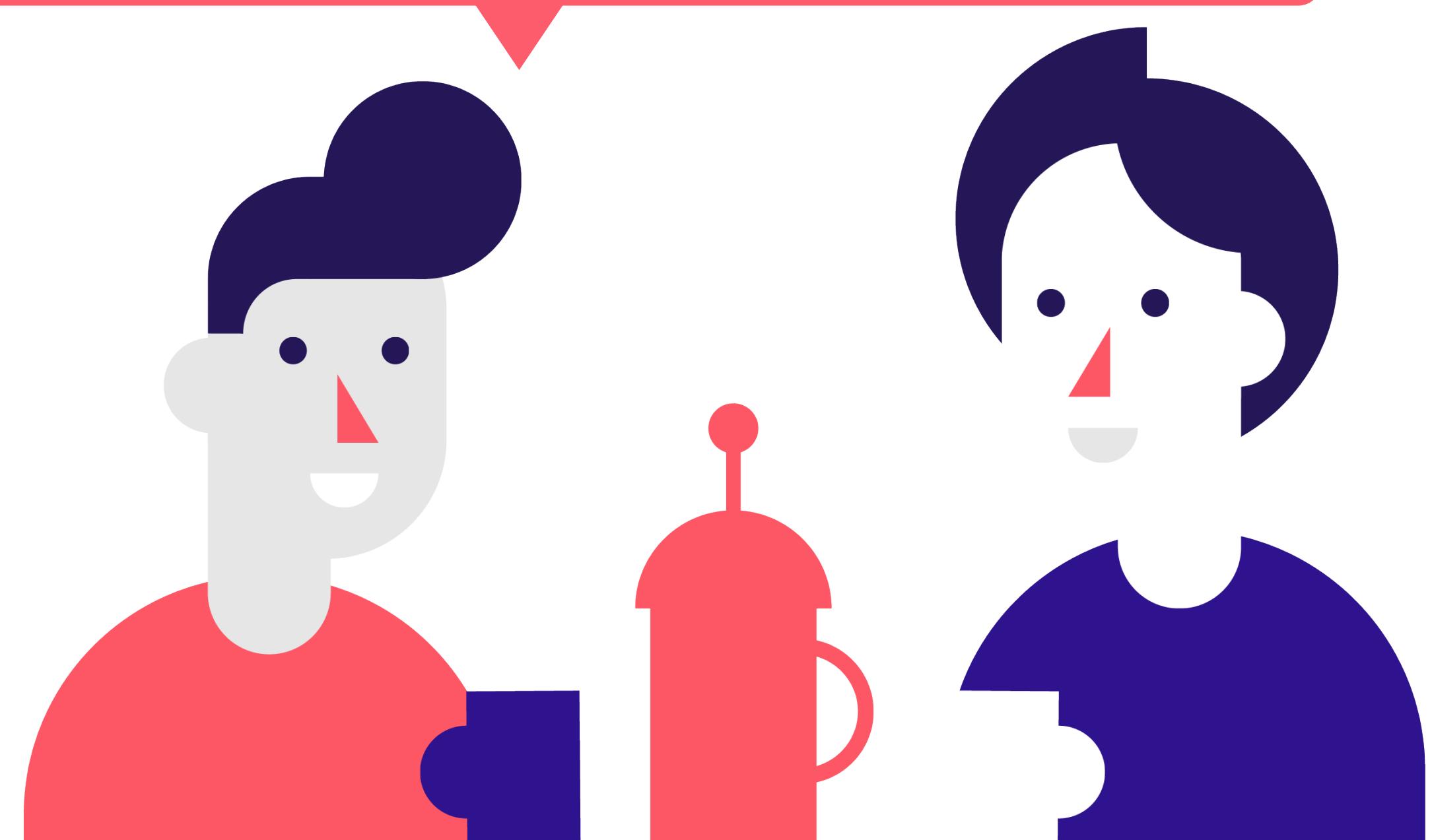
Nature of the Planning service...

“The FAQ's are too generic, there is nothing that fits my needs”

“You would have to do most of this on desktop because there is too much information and too many files to be able to see properly on a phone...”

“I can see new draft local plans - but it is unclear which ones are already being adopted and which are not... How can you challenge an application without knowing this?”

“It is difficult because it is so subjective – lots of complex information you need to get your head around”



Planning in Oxford

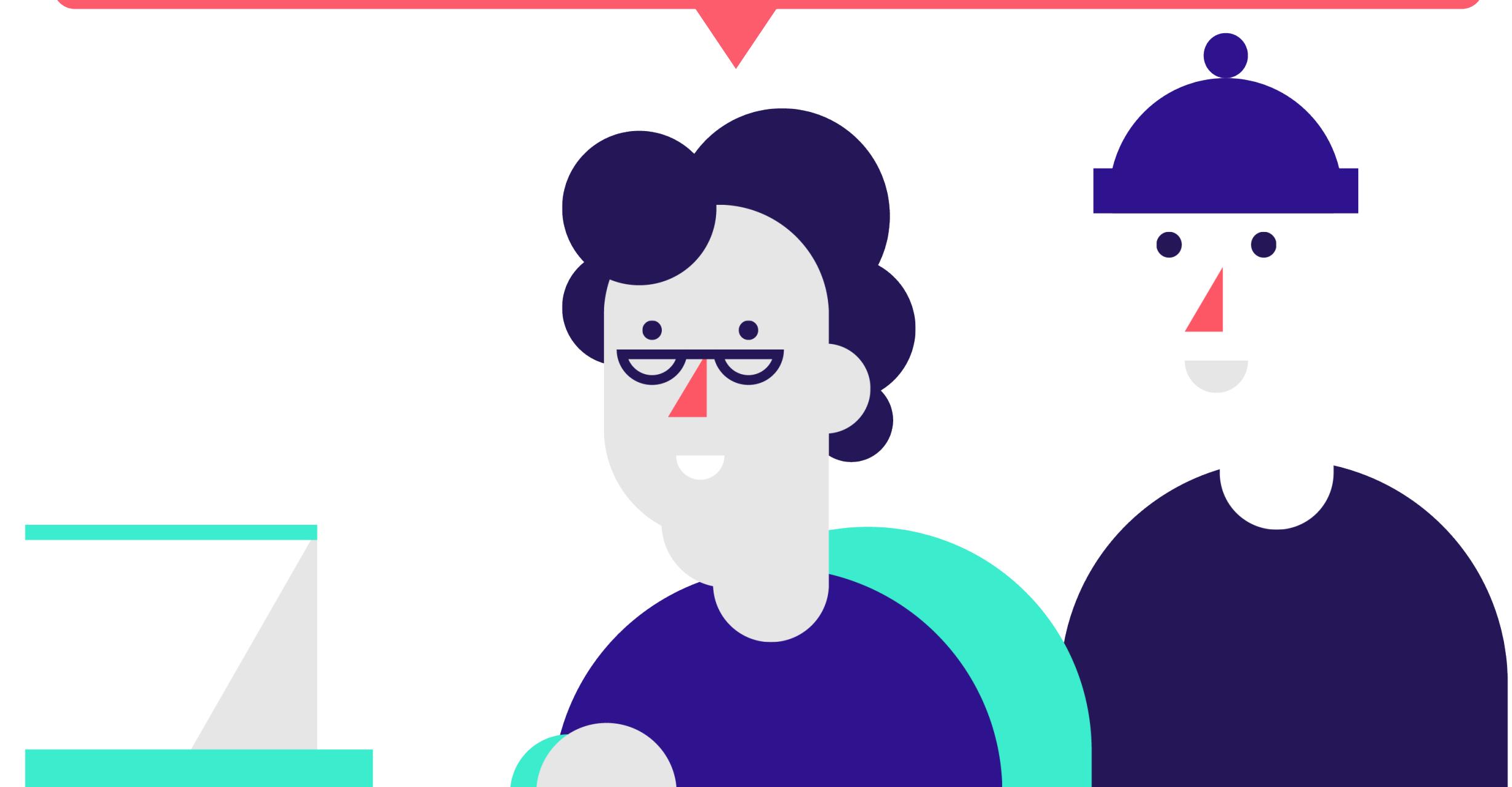
User Quotes

Types of communication...

"If you've got it in writing, you've got proof of what you've said! Good to have a record, to be clear on what's happened and to remember what's been said "

"Trying to explain things in an email just doesn't work, sometimes speaking to someone is the only option... but calling tends to be the last resort."

"So many times something is misinterpreted, like on social media, people misread what others have written... it's dangerous!"



My planning application experience

User experience



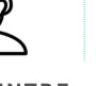
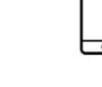
My planning application experience

User Stories

Initial Contact	Ongoing contact & development	Submit application	Council response	Potential appeal
<p>I want to engage with the council So I can kick off the application process</p>	<p>I want to get detailed advice regarding my application So I can reduce the risk of mistakes and failure</p>	<p>I want to submit my application So I can get legal approval from the</p>	<p>I want to hear if I have been successful with my application So I can start work as soon as possible</p>	<p>I want to appeal the rejected application So I can get approval to do work that matters to me</p>
<p>I want to understand the application process So I can request the correct documentation and plan my time and actions accordingly</p>	<p>I want to get detailed advice regarding my application So I can get the most value out of my investment</p>			
	<p>I want to get detailed advice regarding my application So I can be legally compliant</p>			

Experience map - Process of managing my own planning application

Planning: Oxford City Council

	Initial Contact	Ongoing contact and development	Submit Application	Council Response	Potential Appeal
User Needs	<p>I want to understand the application process</p> <p>So I can request the correct documentation and plan my time and actions accordingly</p>	<p>I want to get detailed advice regarding my application</p> <p>So I can reduce the risk of mistakes and failure</p>	<p>I want to submit my application</p> <p>So I can get legal approval from the council</p>	<p>I want to hear if I have been successful with my application</p> <p>So I can start work as soon as possible</p>	<p>I want to appeal my rejected application</p> <p>So I can get approval to start work that matters to me</p>
Actions + Tasks	<ul style="list-style-type: none"> ▶ Go on Council website ▶ Phone or email generic contact ▶ Email with further details 	<ul style="list-style-type: none"> ▶ Research online (Google / Council website / others) ▶ Phone / email support ▶ In person meetings 	<ul style="list-style-type: none"> ▶ Prepare documents and attachments ▶ Submit application online ▶ Pay for application 	<ul style="list-style-type: none"> ▶ Check emails ▶ Check post ▶ Call the council 	<ul style="list-style-type: none"> ▶ Speak to the council ▶ Check government website and do further research ▶ Amend plan / appeal
Channels + Devices	 LAPTOP  MOBILE  LAPTOP  WEBSITE  CALL CENTRE  EMAIL	 LAPTOP  LAPTOP  IN PERSON  WEBSITE  EMAIL  20 MIN	 LAPTOP  WEBSITE	 MOBILE  CALL CENTRE	 LAPTOP  WEBSITE
Emotional	<p>"There are so many ways to get in touch with the council - it is confusing... Its difficult to know what I can and cant ask"</p>	<p>"After calling and emailing I was asked to come in person - if only I had known that from the beginning!"</p>	<p>"I will have to call if I can't find what I need online!"</p>	<p>"The council might or might not call, its unsettling. If I call them I can find out sooner."</p>	<p>"I really don't want this to drag on! It is stressful and time consuming"</p>
Pain Points	<ul style="list-style-type: none"> ▶ City or County Council website? ▶ Phoned council but was just told to email the details 	<ul style="list-style-type: none"> ▶ Confusion: pre / full application ▶ Cant send documents ahead of meeting - only 20 mins ▶ So much subjective information 	<ul style="list-style-type: none"> ▶ Couldn't pay for application online- had to call customer services ▶ What happens next? 	<ul style="list-style-type: none"> ▶ Want better ways to check status update ▶ Have to keep calling when they think there is news ▶ Post is too slow 	<ul style="list-style-type: none"> ▶ Additional work, time, money and stress ▶ Potential engagement with people who disagree with application
Compelling forces	<ul style="list-style-type: none"> ▶ Resident or architect contacting council? ▶ Anxious to make process as easy and painless as possible 	<ul style="list-style-type: none"> ▶ Time flexibility - ongoing research and contact (especially face to face) ▶ Anxiety - reduce errors & risk 	<ul style="list-style-type: none"> ▶ Habit of preparing documents using other software for content checks ▶ Anxiety - has it been received? 	<ul style="list-style-type: none"> ▶ Anxiety - has it been successful ▶ Anxiety - clock is ticking ▶ Habit - calling is quicker 	<ul style="list-style-type: none"> ▶ Anxiety - get it right this time ▶ Push to get things finalised quickly

Process of checking and / or challenging someone's planning application **experience**

User experience



Process of checking and / or challenging someone's planning application experience

User Stories

Awareness	Initial search	Detailed research	Submit comments	Ongoing communication
<p>I want to know what's happening in my community So I can understand how to get the most value out of my own property</p>	<p>I want to seek details about a local planning application So I can understand how it can / does affect me</p>	<p>I want to seek details about policies, legislation and local plans So I can make a strong legal case when challenging the application</p>	<p>I want to submit my comments to the council So I can have them reviewed and taken into legal consideration</p>	<p>I want to be kept informed So I can know the outcome of the application</p>
<p>I want to know what's happening in my community So I can challenge bad planning applications to protect and preserve my community</p>	<p>I want to seek details about a local planning application So I can challenge it if I do not agree with it</p>			<p>I want to be kept informed on changes to my community So I can understand any value being added / challenge bad applications</p>
<p>I want to know what's happening in my community So I can protect my home, my family life and my best interests</p>				

Experience map - Process of checking and / or challenging someone else's planning application

Planning: Oxford City Council

	Awareness	Initial search	Detailed research	Submit comments	Ongoing communication	
User Needs	I want to know what's happening in my community So I can challenge applications, protect my community	I want to seek details about a local planning application So I can understand how it can / does affect me	I want to seek details about policies and local plans So I can make a strong legal case to challenge the application	I want to submit my comments to the council So I can have them taken into legal consideration	I want to be kept informed So I can know the outcome of the application and be aware of future applications in my area	
Actions + Tasks	<ul style="list-style-type: none"> ▶ Keep an eye on local news ▶ Read council newsletter (if signed up) ▶ Check details 'yellow notice' 	<ul style="list-style-type: none"> ▶ Google search: specific application code ▶ Council website search ▶ Generic email / phone 	<ul style="list-style-type: none"> ▶ Research council website or planningportal.co.uk ▶ Contact experts for advice ▶ Meet community / experts 	<ul style="list-style-type: none"> ▶ Write out comments on Word ▶ Copy and paste into Council website or planningportal.co.uk ▶ Submit comments 	<ul style="list-style-type: none"> ▶ Phone and email council for updates ▶ Sign up for newsletter 	
Channels + Devices	 NEWSPAPER  YELLOW NOTICE  LAPTOP  SOCIAL MEDIA  EMAIL	 LAPTOP  GOOGLE & WEBSITE  EMAIL	 CALL CENTRE  LAPTOP  EMAIL	 IN PERSON  WEBSITE  EMAIL	 LAPTOP  WEBSITE  MEETINGS	 LAPTOP  MOBILE  LAPTOP  EMAIL  CALL CENTRE  WEBSITE
Emotional	"You worry about running out of time to challenge the application!" 	"A generic email or phone number is frustrating - I just want to talk to someone who knows what they are talking about!" 	"There's no way around it - if you don't read the local guidance, you won't have a leg to stand on - it is a legal challenge" 	"What happens next? Will I be kept in the loop?" 	"I wouldn't need to phone if someone actually answered my emails!" 	
Pain Points	<ul style="list-style-type: none"> ▶ Council doesn't have to tell you ▶ You have to find it - but sometimes it's not clear how to ▶ Surprise element - disagree with something 	<ul style="list-style-type: none"> ▶ City vs County Council? ▶ Can't find what I am looking for, feeling stuck ▶ Phoned but told to email more detailed information 	<ul style="list-style-type: none"> ▶ Complex and subjective information and jargon ▶ FAQ's are too generic ▶ Told to come in person after sending an email 	<ul style="list-style-type: none"> ▶ Unsure how comments will be used / how the process works ▶ Unsure about next steps ▶ Unsure on how to set expectations 	<ul style="list-style-type: none"> ▶ Not getting enough reassurance ▶ Waiting too long to find out what's happening ▶ Having to call for updates 	
Compelling forces	<ul style="list-style-type: none"> ▶ Anxiety - don't know how to challenge, how long do you have and will you succeed? ▶ Push - something is happening that I don't agree with 	<ul style="list-style-type: none"> ▶ Anxiety - need reassurance that I am doing the right thing ▶ Push - deadline means I have to act fast 	<ul style="list-style-type: none"> ▶ Anxiety - fear that I am not understanding or doing the right thing ▶ Push - following advice and instructions 	<ul style="list-style-type: none"> ▶ Push - following process set by the council ▶ Anxiety - fear that nothing will come of efforts 	<ul style="list-style-type: none"> ▶ Anxiety - no information, fear of not being in control ▶ Habit - calling means I can talk to someone and get answers 	



Waste and recycling in NE Derbyshire

Chatbot Project User Research



Key Findings

- **Six user interviews** based in Chesterfield, NE Derbyshire.
Four face-to-face and two over the phone.
- Most of the tasks were **simple information or service requests** - all users who called the Council said that the calls were dealt with quickly and easily.
- **Majority of users defaulted to mobile use** - this reflects users' perception that waste and recycling tasks are simple can can be addressed via their mobile phones.
- **All users had difficult web experiences on the Council website** - resulting in going back to Google to search for the information elsewhere or calling the Council directly.
- **All users voiced a preference to self serve** where possible
- if this is not possible, or if it is difficult, they would not hesitate to call.
- These are paying customers - but **they can't switch** if they have a bad or unsatisfactory service. If their issue is not resolved, they usually have to adopt inconvenient alternative solutions.

User Quotes

About contacting the council...

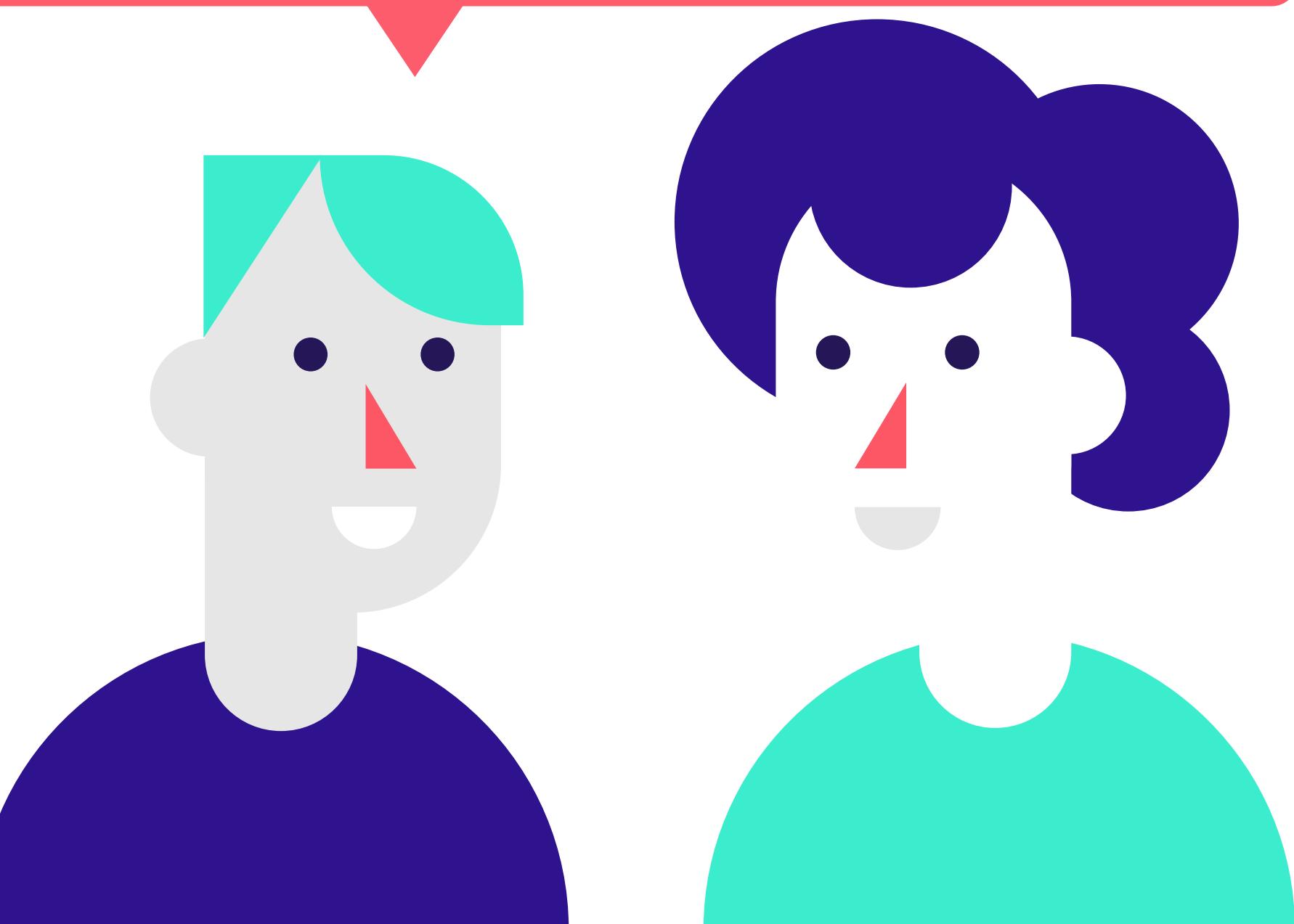
"I could text to ask for a new bin, and get a response to tell me it will get sorted - if someone gave me a timescale I would be confident that it would get sorted."

"I don't have time to look around - saves me time by just calling."

"The world isn't so 9-5 anymore... people lead very different lives and have different schedules."

"I wouldn't expect people to work 24/7."

"I call when it's something I can't access myself."



User Quotes

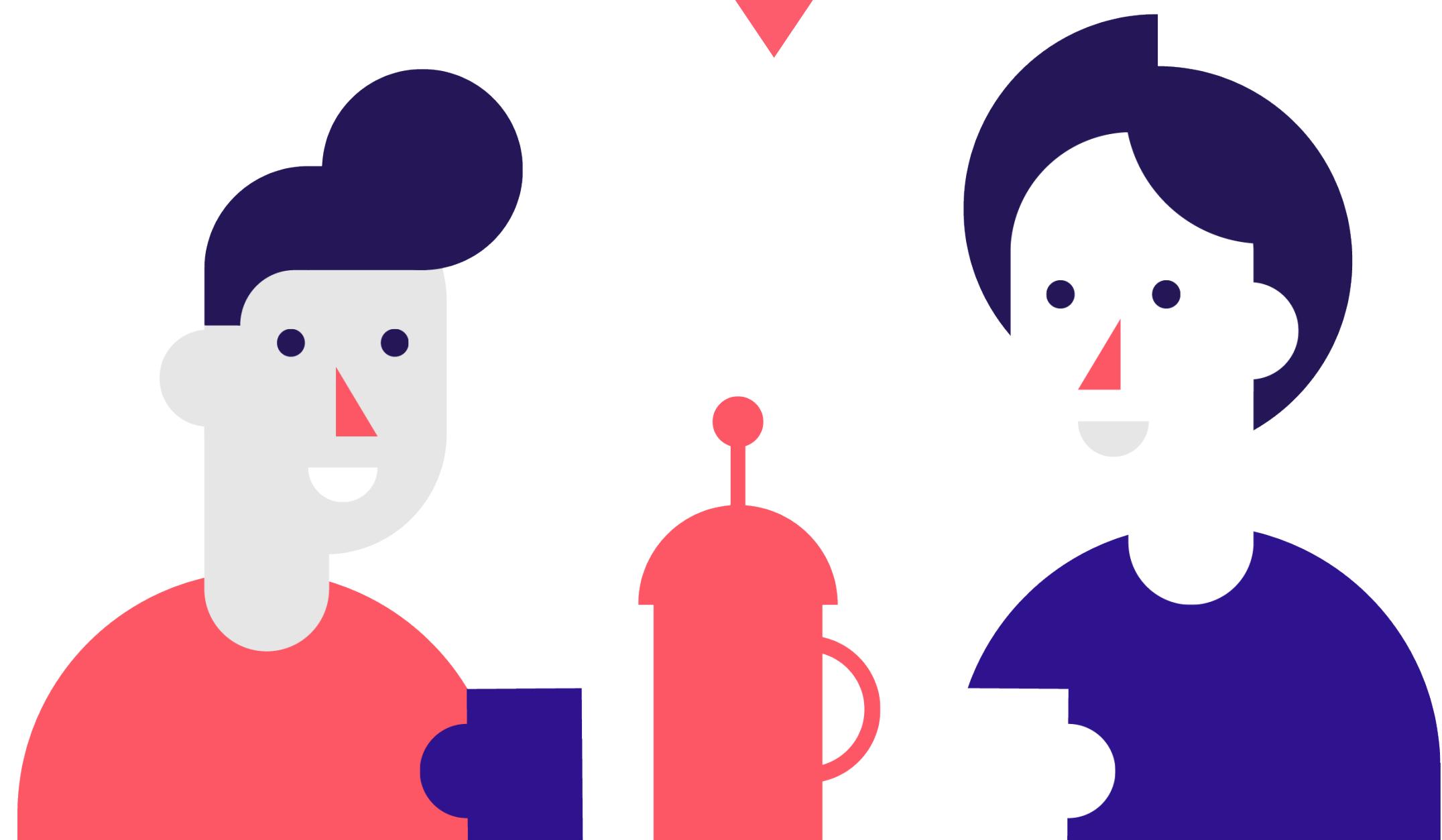
Nature of the Waste and recycling service...

"When I couldn't get a bigger bin - they told me to ask a neighbour to switch bins with me. I'm sure they were just trying to help but I thought it was quite unprofessional - I wasn't too happy about that."

"Its really frustrating when bins get collected and you already have a backlog of 3 bin bags because your bin is too small."

"I got a call to sort out my council tax - that was really handy! One less thing on my list."

"I expected to be given some information by the council when I moved in..."



User Quotes

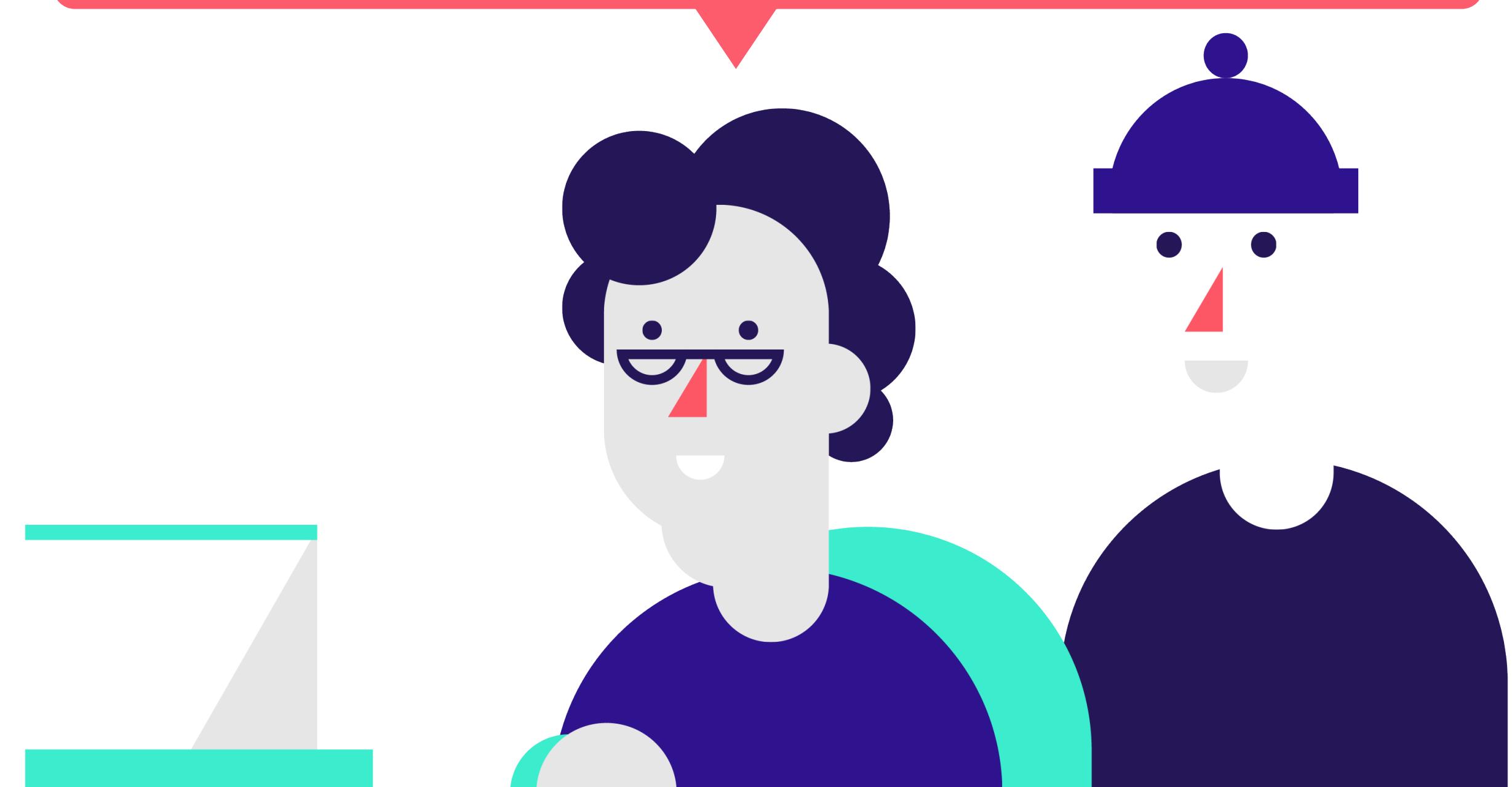
Types of communication...

"Texting isn't so formal... I wouldn't reply to PDP [delivery service] - 'I look forward to meeting Wayne in due course' - you just get helpful notifications."

"I quite like when it's just a robot and you can get all your things down and not have to worry about speaking to someone."

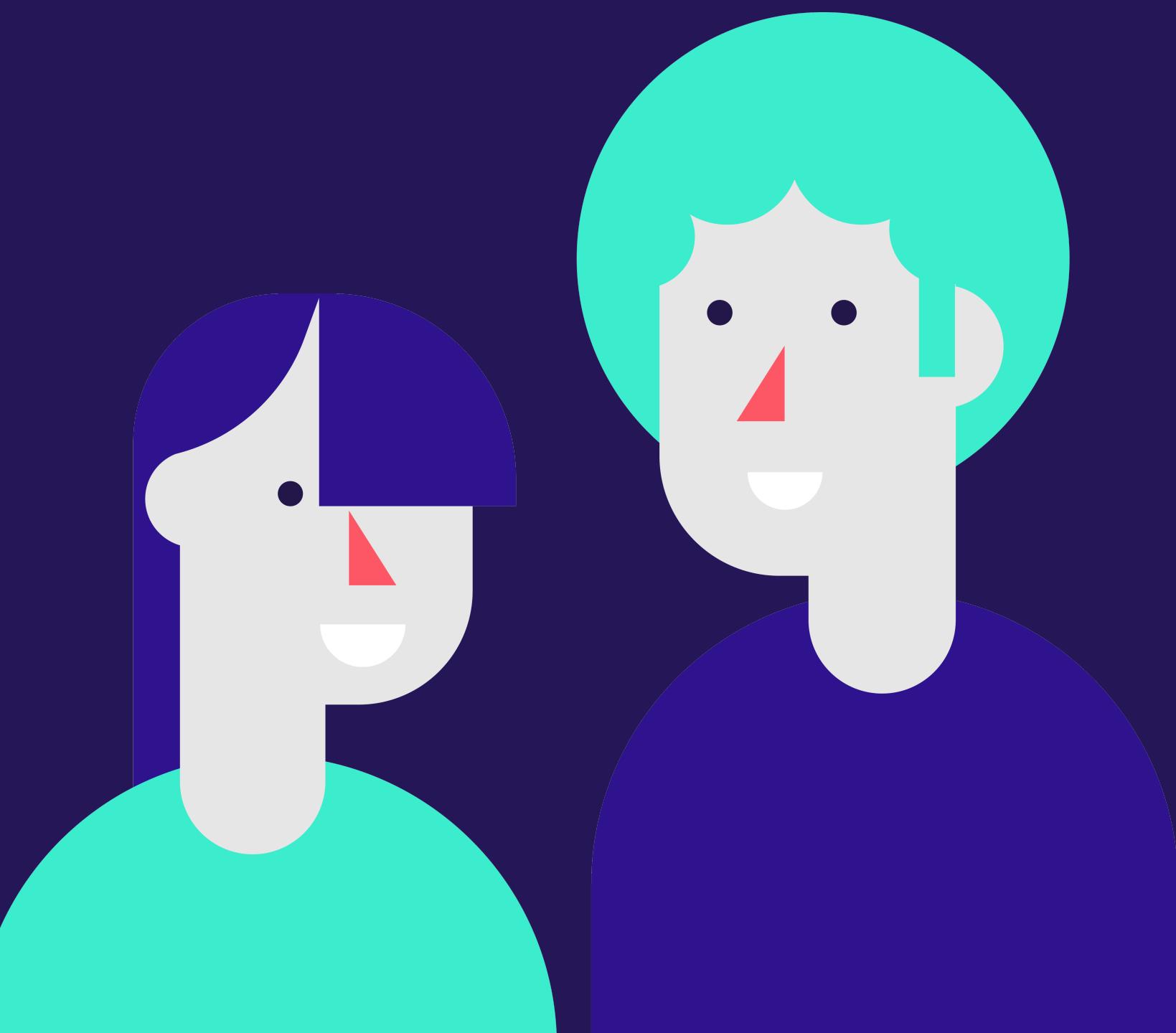
"I wanted to get in touch with {payment provider} - I was getting scammed, so I needed to get in touch with someone immediately. I used their 'automated assistant' - I was writing about scams and it was sending me links to related articles instead of putting me through to a person. I start getting Tourettes at the computer!"

"I don't want to come across as someone who complains..."



Waste and recycling user experience

User experience



Waste and recycling Experience

User Stories

Trigger need	Online search	Council website	Contact council	Task resolution
<p>I want to understand what the rules are in this council So I can live by the rules and get my life in order</p>	<p>I want to find information about my Waste and recycling query So I can resolve my issue</p>	<p>I want to find information So I can know what to do about my waste & recycling</p>	<p>I want to contact the council So I can resolve my issue / ask for information</p>	<p>I want to know when my bins / components are being delivered So I can know when to expect their delivery (especially if I have paid for them)</p>
<p>I want to ensure everything is in order So I can get rid of my household waste as normal</p>	<p>I want to find information from the right council So I can contact and resolve my issue</p>	<p>I want to make a complaint / request So I can resolve my issue and get back to normal</p>	<p>I want to call the council So I can make a payment</p>	<p>I want to resolve this issue So I can get on top of my household waste & recycling</p>
<p>I want to contact my local council So I can set up my life in my new home</p>	<p>I want to search for council information using an effective and familiar search engine So I can find the information quickly and easily</p>	<p>I want to find a contact number So I can call the council and resolve my issue</p>	<p>I want to call the council So I can report an issue</p>	<p>I want to have further information about the service So I can use it appropriately</p>
	<p>I want to find contact details for my local council So I can contact them about my query and get things resolved</p>			<p>I want to able to rely on the council services So I can avoid inconvenient alternative solutions</p>

Experience map

Waste & Recycling: NE Derbyshire District Council

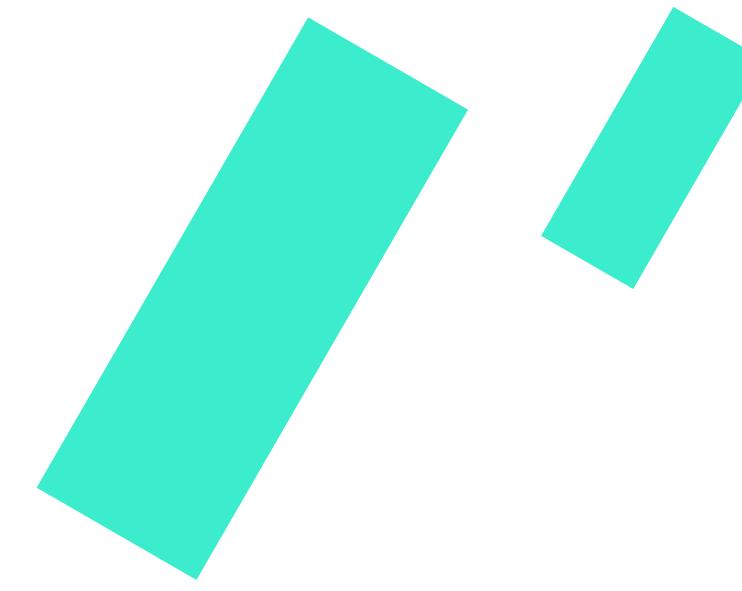
	Trigger Need	Online Search	Search Council Website	Contact Council	Task Resolution
User Needs	I want to get information / resolve an issue So I can dispose of my waste properly	I want to find information from my local council So I can contact them / resolve my issue	I want to find specific information / request a service So I can resolve my issue and get back to normal	I want to call the council So I can resolve my issue	I want to be able to rely on council services So I can avoid inconvenient alternative solutions
Actions + Tasks	<ul style="list-style-type: none"> ➤ Move to a new house - need to set up the basics ➤ Realise there is an issue with current bin set up 	<ul style="list-style-type: none"> ➤ Search on Google ➤ Find the right Council to contact / seek further information 	<ul style="list-style-type: none"> ➤ Search for information ➤ Try to complete a task / self serve ➤ Search for a contact number 	<ul style="list-style-type: none"> ➤ Call Council - call centre and direct department numbers ➤ Provide simple information as requested by Council 	<ul style="list-style-type: none"> ➤ Wait for solution or resolution (service request) ➤ Find short / long term alternative solutions if told 'no'
Channels + Devices	 AT HOME  IN PERSON	 MOBILE  SEARCH ENGINE	 MOBILE  COUNCIL WEBSITE	 MOBILE  COUNCIL WEBSITE	 AT HOME  IN PERSON
Emotional	"I was expecting information from the council" "My bin has gone missing!"	"I always get confused, I need to check the council logo to make sure its the right one"	"I had to go back to Google to search for a specific page on that website"	"It was quickly answered and quickly resolved - I felt reassured"	"I don't want to come across as someone who complains..." "I cant keep going like this forever! I will have to call again"
Pain Points	<ul style="list-style-type: none"> ➤ New to this area - I don't know what to do / who to contact ➤ Something unexpected has happened - I have to find a solution 	<ul style="list-style-type: none"> ➤ Unsure which is the correct council to reach out to 	<ul style="list-style-type: none"> ➤ IA and content not useful ➤ Poor internal search and taxonomy - back to Google ➤ Don't have mobile friendly site 	<ul style="list-style-type: none"> ➤ Confusion over prices ➤ Being transferred in order to make payment over the phone 	<ul style="list-style-type: none"> ➤ Adopting inconvenient alternative solutions as Council can't provide service ➤ No confirmations or alerts - bins just show up!
Compelling forces	<ul style="list-style-type: none"> ➤ Habit: what did I do before / how did I previously solve this? ➤ Anxiety: I need something fixed and I don't know how / how long it will take 	<ul style="list-style-type: none"> ➤ Habit: Google search engine is first port of call 'Googling' ➤ Habit: Mobile search - quick and convenient 	<ul style="list-style-type: none"> ➤ Anxiety: only option / not meeting expectations online ➤ Habit: self help is first port of call - but will call if stuck 	<ul style="list-style-type: none"> ➤ Pull / Habit: Calling will resolve my issue quicker ➤ Push: couldn't do it online, so must resolve my issue now 	<ul style="list-style-type: none"> ➤ Anxiety: feeling stuck ➤ Anxiety: no tracking (new bins) ➤ Push: still has to dispose of waste (office / tip)



Revenues and benefits in Redditch

Chatbot Project User Research





Revenues and benefits in Redditch

Key Findings

- **Seven user interviews** based in Redditch. Six face-to-face and one over the phone.
- **Two key journeys identified:** 1) Billing and enquiries, and 2) Applying or switching council housing. These were both **focussed on Benefits only** - no interviews based on Revenues.
- **All users started journeys at a point of anxiety** and disadvantage due to life circumstances or frustration due to errors made by the council.
- **Reassurance and control** is a key need of users' overall experiences due to the high risk and potential negative impact on life if issues are not resolved.
- **Users are more likely to call rather than self serve** online. For those who do try to self serve online, their online experience is so bad that they call - as its quicker and easier to resolve their query or issue.
- **Trust issues were also prevalent** - this is due to the financial nature of the service and the potential for real impact on people's lives.
- **These experiences can be cyclical** as users need to periodically ask for support or give supporting evidence. The pace of the experience can also change from 'slow' to 'urgent' as users can be suddenly expected to react quickly.

Revenues and benefits in Redditch

User Quotes

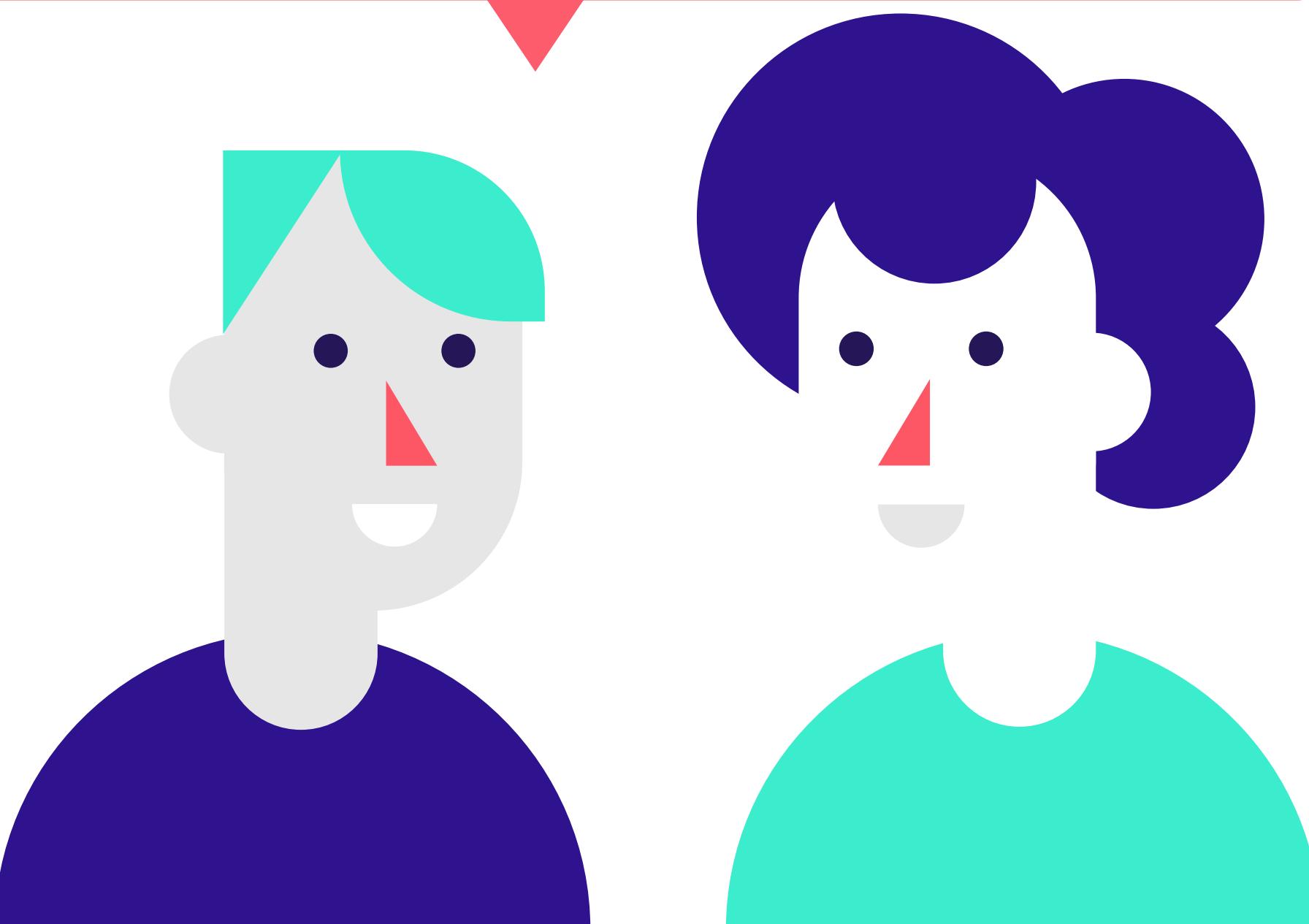
About contacting the council...

"Having copies gives me reassurance that I have my back covered - I got an email saying that I was off the list because I didn't send documentation - so I sent them the trail of emails."

"A text would be fine if I want to know when my bill is due... It's quick fire, don't want to wait for ages on the phone for an answer to a simple question."

"I don't have much trust in the council answering my email... [quality of response and time of response]."

"If I had just had a heads up that there was a backlog I wouldn't have called. Just nip it in the bud."



Revenues and benefits in Redditch

User Quotes

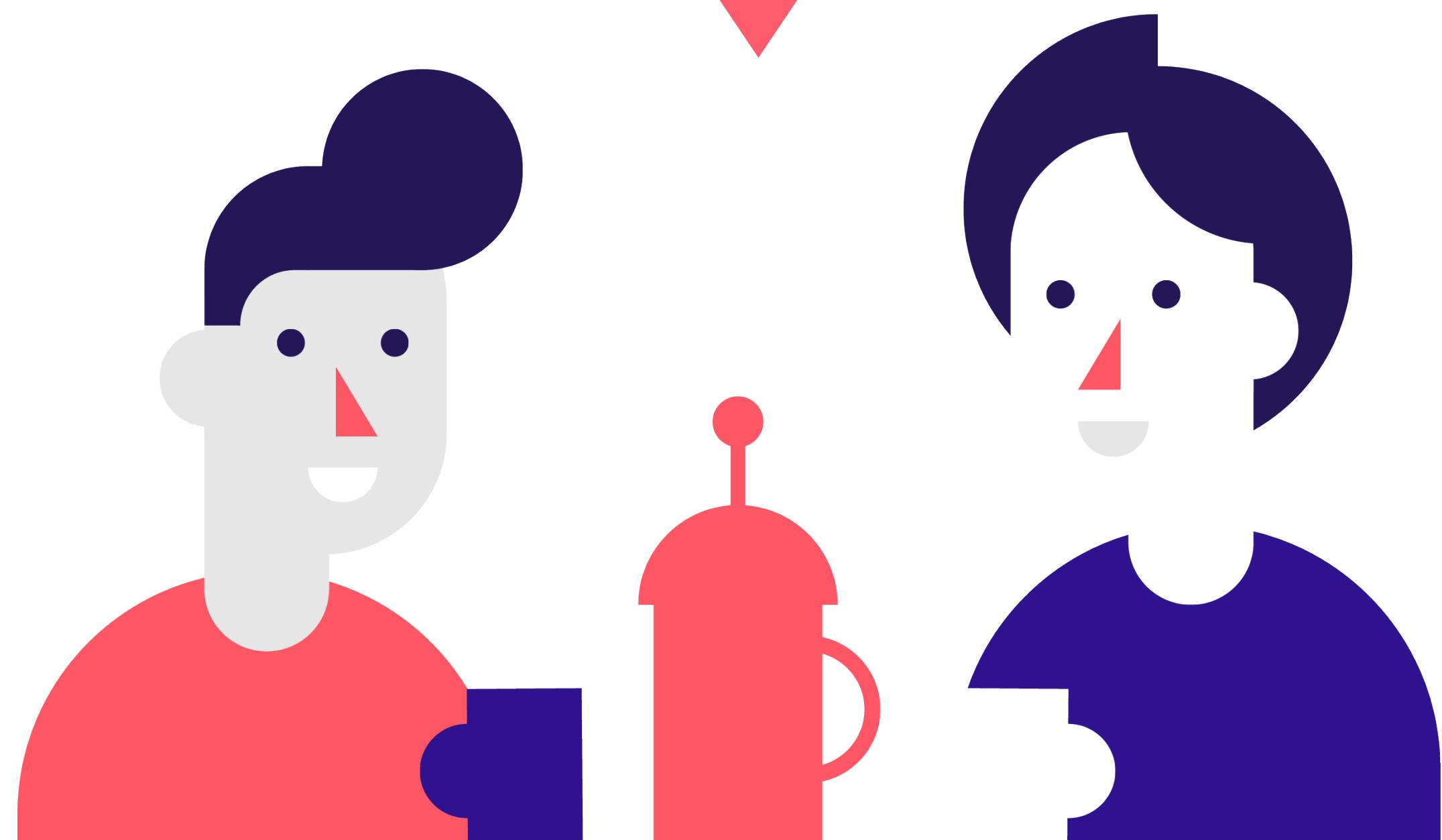
Nature of the Revenues and benefits service...

"I need someone to explain things to me - it's quicker than me taking forever to figure things out myself."

"Problems don't always arise between 9-5, Monday - Friday.... and I might not be available then!"

"My husband is disabled and we need a bungalow so its easy for him to move around. We were waiting for over a year to find a place and now we've had to start all over again!"

"I like doing things myself, but I needed help."



Revenues and benefits in Redditch

User Quotes

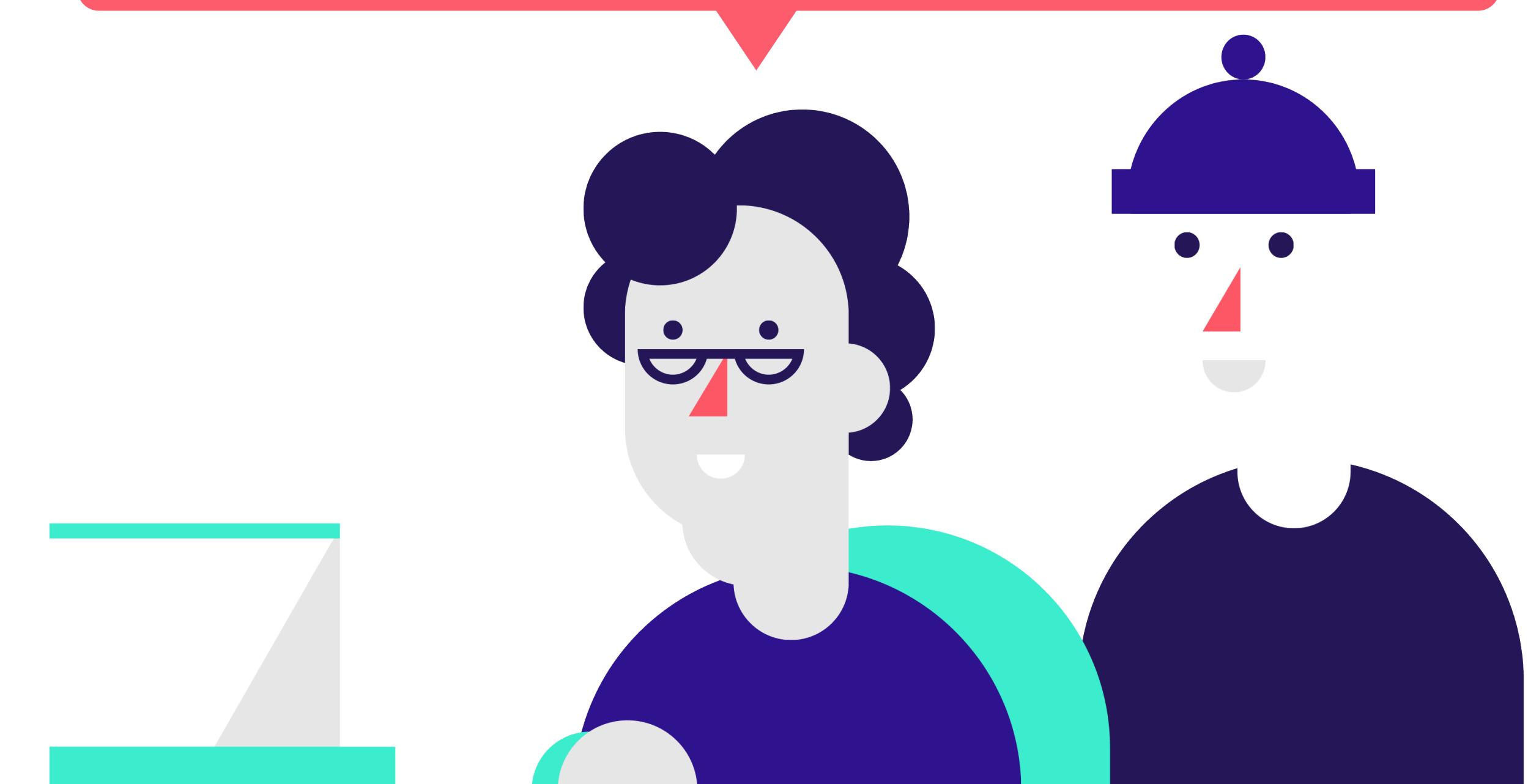
Types of communication...

"If people wanted to talk to me I'd rather see in writing so I can see things in my own time."

"If I had emailed I might have asked a few more questions! I hang the phone then go, oh I should have said this and that! Oh never mind."

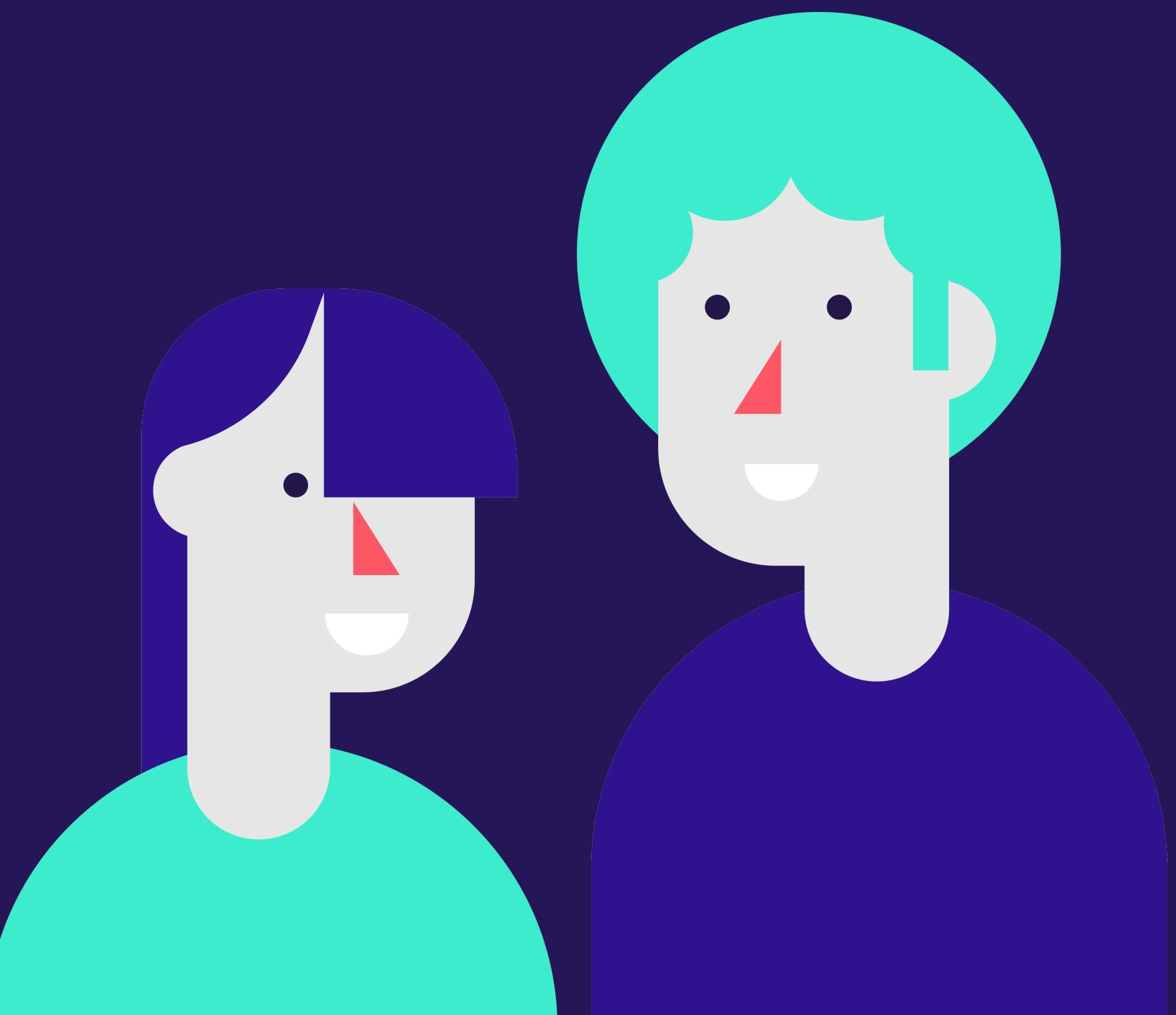
"I prefer calling - makes it easier to express yourself. Talking is better to be understood."

"If I had a slot I would happily wait to talk in detail – I would feel important, so many times you don't feel like people are giving you the attention you deserve."



Billing and enquiries experience

User experience



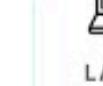
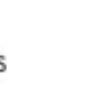
Billing and enquiries experience

User Stories

Event - Push	Search	Contact	Resolve	Confirmation
<p>I want to be kept up to date with council costs / income So I can plan my finances and make ends meet</p>	<p>I want to search for contact details So I can get in touch with the council who can help me</p>	<p>I want to contact the council So I can complain about a mistake and resolve the issue</p>	<p>I want to contact the council So I can follow due process to complete my task</p>	<p>I want to receive confirmation of task completion So I can have peace of mind</p>
<p>I want to adapt to recent changes in my life So I can make things better and make ends meet</p>	<p>I want to research my rights So I can be prepared for conversations with the council</p>	<p>I want to contact the council So I can enquire about service eligibility</p>	<p>I want to submit forms / evidence So I can follow due process and complete my task</p>	<p>I want to get receipts / copies of communications So I can cover my back in case things go wrong</p>
<p>I want to respond to a council letter So I can understand the implications / rectify mistakes</p>		<p>I want to contact the council So I can ensure my issue / request is being resolved</p>	<p>I want to contact the council So I can ensure my issue / request is being resolved</p>	<p>I want to get receipts / copies of communications So I can cover my back in case things go wrong</p>

Experience map - Council Tax & Benefits - Billing & Enquiries

Revenue & Benefits: Redditch & Bromsgrove

	Push: Event	Search	Contact	Resolve	Confirm
User Needs	I want to adapt to recent changes in my life So I can make ends meet and make things better	I want to search for advice and contact details So I can get in touch with someone who can help me	I want to contact the Council So I can ask for help / enquire about service / complain about a mistake	I want to contact the Council So I can follow due process to complete my task	I want to receive confirmation of task completion So I can have peace of mind
Actions + Tasks	<ul style="list-style-type: none"> ▶ Seek social advice ▶ Read council letter ▶ React to letters immediately 	<ul style="list-style-type: none"> ▶ Google specific service (eg: single occupancy council tax) ▶ Google council contact 	<ul style="list-style-type: none"> ▶ Call / email Council ▶ Enquire / request a service ▶ Complain / resolve issue 	<ul style="list-style-type: none"> ▶ Contact council with relevant information / evidence ▶ Set up payments were relevant ▶ Keep logs / receipts 	<ul style="list-style-type: none"> ▶ Confirmation by email / post ▶ Call Council and Partners to check issue has been resolved - nothing outstanding
Channels + Devices	 IN PERSON  LETTER  CALL	 LAPTOP  MOBILE  GOOGLE  WEBSITE	 LAPTOP  MOBILE  EMAIL  CALL CENTRE	 MOBILE  LAPTOP  FORMS  CALL CENTRE  EMAIL  IN PERSON	 LAPTOP  MOBILE  LETTER  EMAIL  COUNCIL & PARTNERS
Emotional	<p>"Every year they don't carry over my credit!" "I'm on the wrong tax band - again!"</p>  	<p>"I wanted to know what my rights were before getting in touch"</p> 	<p>"I need to chase it up to avoid other mistakes" "I need help. What do I have to do?"</p>  	<p>"The forms are just too complicated! Its like they don't want us to understand it"</p> 	<p>"Receipts give me peace of mind. I need to have reassurance, it covers everybody's back"</p> 
Pain Points	<ul style="list-style-type: none"> ▶ Panic - I have to do something about this ▶ Frustration with mistakes ▶ Confusing bills - potential to get taken advantage of 	<ul style="list-style-type: none"> ▶ Don't understand what services are available ▶ New to this - don't know where to start 	<ul style="list-style-type: none"> ▶ Having to mediate between council and partners (HA) ▶ Having to call to correct a mistake - unnecessary stress ▶ Unable to find a direct number 	<ul style="list-style-type: none"> ▶ Forms are difficult and complex - have to trust that council is giving correct information 	<ul style="list-style-type: none"> ▶ Having to mediate between council and partners (HA) ▶ Waiting to get formal confirmation of resolution
Compelling forces	<ul style="list-style-type: none"> ▶ Push: sudden changes in personal circumstances ▶ Push: letter from Council ▶ Anxiety: fear of implications 	<ul style="list-style-type: none"> ▶ Habit: Googling for information ▶ Anxiety: fear of issue being unresolved ▶ Pull: appeal of getting help 	<ul style="list-style-type: none"> ▶ Anxiety: fear of issue being unresolved ▶ Push / pull: only one place to turn to 	<ul style="list-style-type: none"> ▶ Anxiety: don't trust council to get it right ▶ Push: have to trust council and move forward 	<ul style="list-style-type: none"> ▶ Anxiety: fear of future mistakes and extra effort required to resolve issue ▶ Anxiety: need for formal communications

Applying or switching council housing experience

User experience



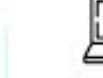
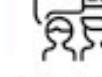
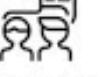
Applying or switching council housing experience

User Stories

Push - change in context	Contact council	Coordinating	Final steps	Unresolved
<p>I want to adapt to recent changes in my life So I can make things better and make ends meet</p>	<p>I want to contact the council So I can complain about a mistake and resolve the issue</p>	<p>I want to contact the council So I can ensure my issue / request is being resolved</p>	<p>I want to contact the council So I can ensure my issue / request is being resolved</p>	<p>I want to contact the council So I can ensure my issue / request is being resolved</p>
<p>I want to educate myself about my options So I can plan and act appropriately</p>	<p>I want to contact the council So I can enquire about service eligibility</p>	<p>I want to contact the council So I can follow due process to complete my task</p>		<p>I want to contact the council partners (housing association) So I can follow due process to complete my task</p>
<p>I want to search for contact details So I can get in touch with the council</p>	<p>I want to contact the council So I can arrange / change my housing benefits</p>	<p>I want to contact the council partners (housing association) So I can follow due process to complete my task</p>		<p>I want to contact the council So I can ensure I have all the information needed to resolve my issue</p>
	<p>I want to get receipts / copies of communications So I can cover my back in case things go wrong</p>	<p>I want to contact the council So I can ensure I have all the information needed to resolve my issue</p>	<p>I want to contact the council So I can be up to date on my place in the queue</p>	
			<p>I want to submit forms / evidence So I can follow due process and complete my task</p>	

Experience map - Applying or Switching Council Housing

Research Theme: **Council**

	Push: Event	Contact	Coordinate	Resolve	Unresolved
User Needs	I want to adapt to recent changes in my life So I can make ends meet and make things better	I want to contact the Council So I can arrange / change my housing benefits	I want to contact the Council So I can follow due process to complete my task	I want to contact the Council So I can ensure my issue / request is being resolved	I want to contact the Council So I can ensure my issue / request will be resolved
Actions + Tasks	<ul style="list-style-type: none"> ▶ Seek social advice ▶ Search for information online 	<ul style="list-style-type: none"> ▶ Call the council to understand and kick start process 	<ul style="list-style-type: none"> ▶ Contacting council and housing association - joining waiting lists ▶ Providing documentation and in person home assessments 	<ul style="list-style-type: none"> ▶ Contacting council and housing association - trying to finalise process 	<ul style="list-style-type: none"> ▶ Continue to contact council and housing association - trying to resolve and finalise process
Channels + Devices	 IN PERSON  LAPTOP  WEBSITE	 MOBILE  CALL CENTRE	 MOBILE  LAPTOP  FORMS  CALL CENTRE  EMAIL  IN PERSON	 MOBILE  CALL CENTRE	 MOBILE  LAPTOP  FORMS  CALL CENTRE  EMAIL  IN PERSON
Emotional	"I wasn't impressed. This was all new to me. I needed to find information so I could know what to do"	"Nobody would put me on a list cause I lived in Spain! I couldn't get back home."	"I was number 16 - it could take forever. Couldn't wait anymore."	"After a year of waiting I was told I needed an £800 deposit - I had no clue! I was really angry"	"I got a bit arsy so I let it go for a bit. Trying to find alternative solutions now."
Pain Points	<ul style="list-style-type: none"> ▶ New to system and information ▶ Complex information is hard to find and digest ▶ Need for reassurance and hand holding 	<ul style="list-style-type: none"> ▶ Unable to reach team in the afternoon ▶ Unable to get help needed ▶ Not knowing how long until problems will be resolved 	<ul style="list-style-type: none"> ▶ Confusion over housing waiting list categories ▶ Not knowing how long the wait will be > impacts on life and financial decisions 	<ul style="list-style-type: none"> ▶ Anger over critical information not communicated > and negative impact on life ▶ Council not able to help or advise on alternatives 	<ul style="list-style-type: none"> ▶ Frustration at unresolved issue ▶ Frustration at lack of hand holding and alternative support
Compelling forces	<ul style="list-style-type: none"> ▶ Anxiety: stress due to contextual hardship ▶ Anxiety: fear of not getting the help they need from only source of help available 	<ul style="list-style-type: none"> ▶ Anxiety: stress due to contextual hardship ▶ Anxiety: not being able to self help & not knowing when problems will be resolved 	<ul style="list-style-type: none"> ▶ Anxiety: not knowing when problems will be resolved ▶ Push: having to react quickly at the drop of a hat 	<ul style="list-style-type: none"> ▶ Anxiety: not knowing when problems will be resolved ▶ Anxiety: fear of not getting the help they need from only source of help available 	<ul style="list-style-type: none"> ▶ Anxiety: stress due to contextual hardship ▶ Anxiety: not being able to self help & not knowing when problems will be resolved



Highways in Surrey

Chatbot Project User Research



Key Findings

- **Eight user interviews** based in Leatherhead, Surrey. All face-to-face interviews.
- **Two key journeys identified:** 1) Reporting an issue or requesting an improvement, and 2) Complex urban planning enquiries.
- The key motivation for engaging with the council was around **safety and reducing both existing and potential negative impacts** on daily life and the community (for example: traffic, road safety, parking).
- **This is a subjective issue** - how does one classify and prioritise highways issues? Do residents agree with this?
- Users were predominantly **frustrated about not feeling heard**. Not getting a response, not getting meaningful justifications, not getting reassurance that they are not asking for the unreasonable.
- **Confusion around how councils are organised**, who is responsible for what, who should they call?
- Users expect organisations to **display joined up thinking** - particularly with complex urban planning enquiries.
- Users expect the councils to have **established processes for commonplace issues** such as potholes

User Quotes

About contacting the council...

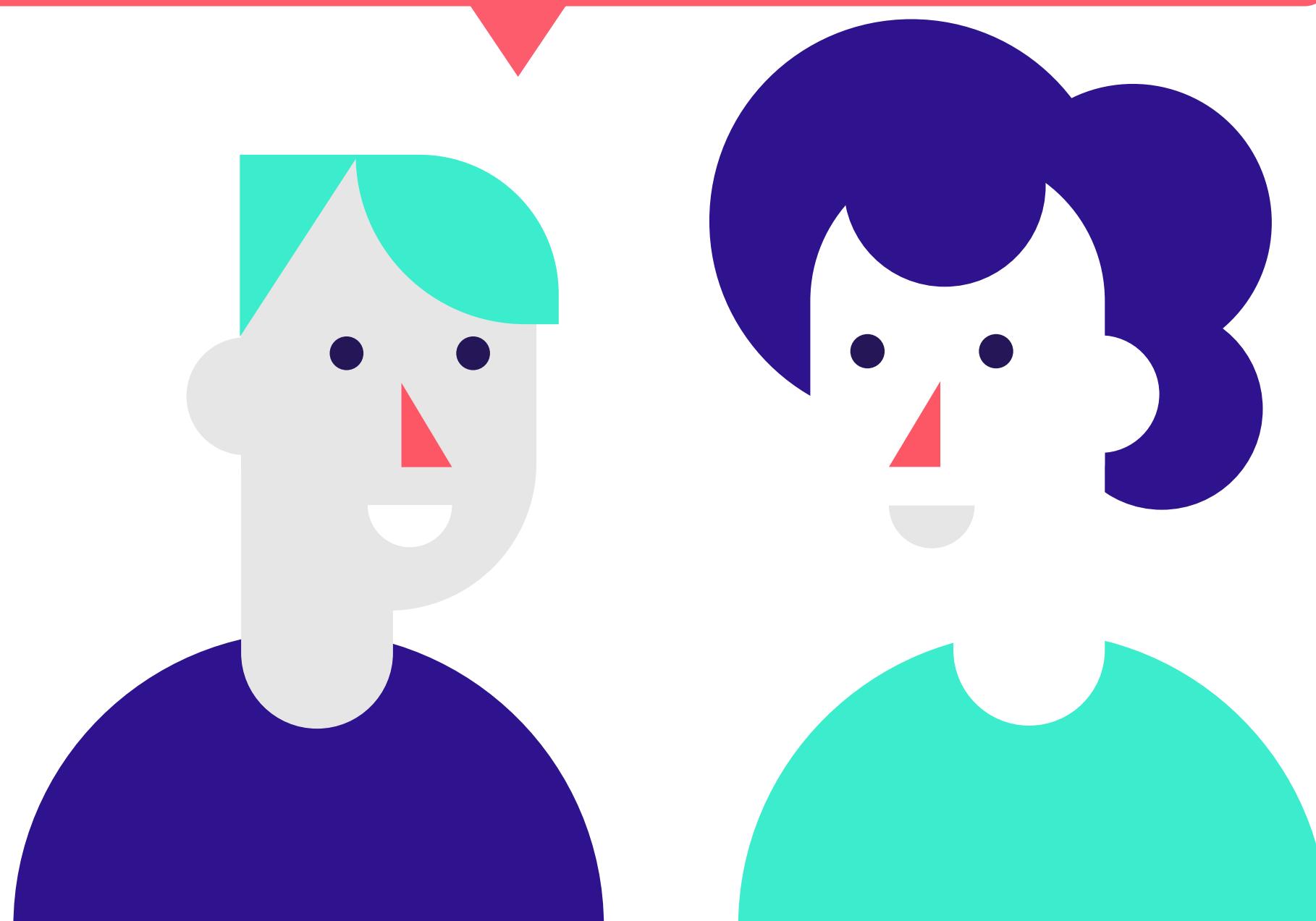
"Nowadays you'd expect to have access to things 24/7. Being able to book appointment outside of work hours is expected. But I wouldn't expect someone to talk to me about this at midnight."

"We need to take responsibility for it - we need to report issues, it is the council's responsibility to mend things."

"Hard to tell how councils are organised... its very Blancmange-y... it's not quite set."

(self help) "I've used internal search but 50 options come up - all these irrelevant documents and meeting minutes."

"I might not have agreed with it... but I expected some kind of response, some kind of answers or justification / rationalisations for plans - awareness of anticipated changes to traffic."



User Quotes

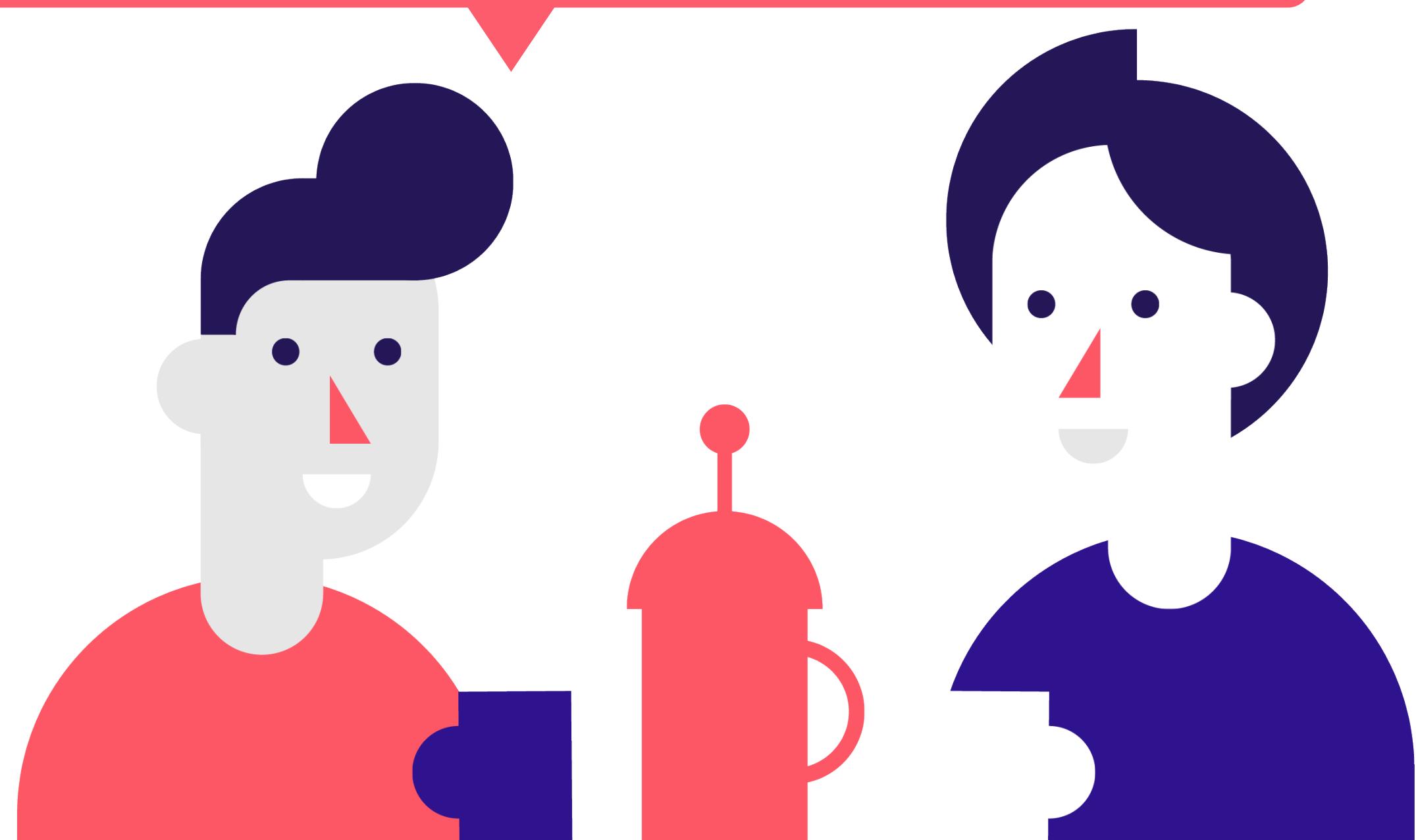
Nature of the Highways service...

"People make it sound like we are all just making a big fuss about potholes... but I once got 50 stitches on my face because of one. They are dangerous!"

"I have left notes on their car [person who parked where they shouldn't on users driveway] - I don't want to have to aggravate others about it - I wouldn't want my car scratched or having a brick through my window."

"People get abusive with my wife and daughter [regarding parking on tight driveways] . Not with me because I look like this. When I leave notes on people's cars I leave my house number on it - its not anonymous!"

"If I had tarmac or yellow paint I'd do it [fix pot holes / paint double yellow lines] myself! Its not really something I can go and do myself."



Highways in Surrey

User Quotes

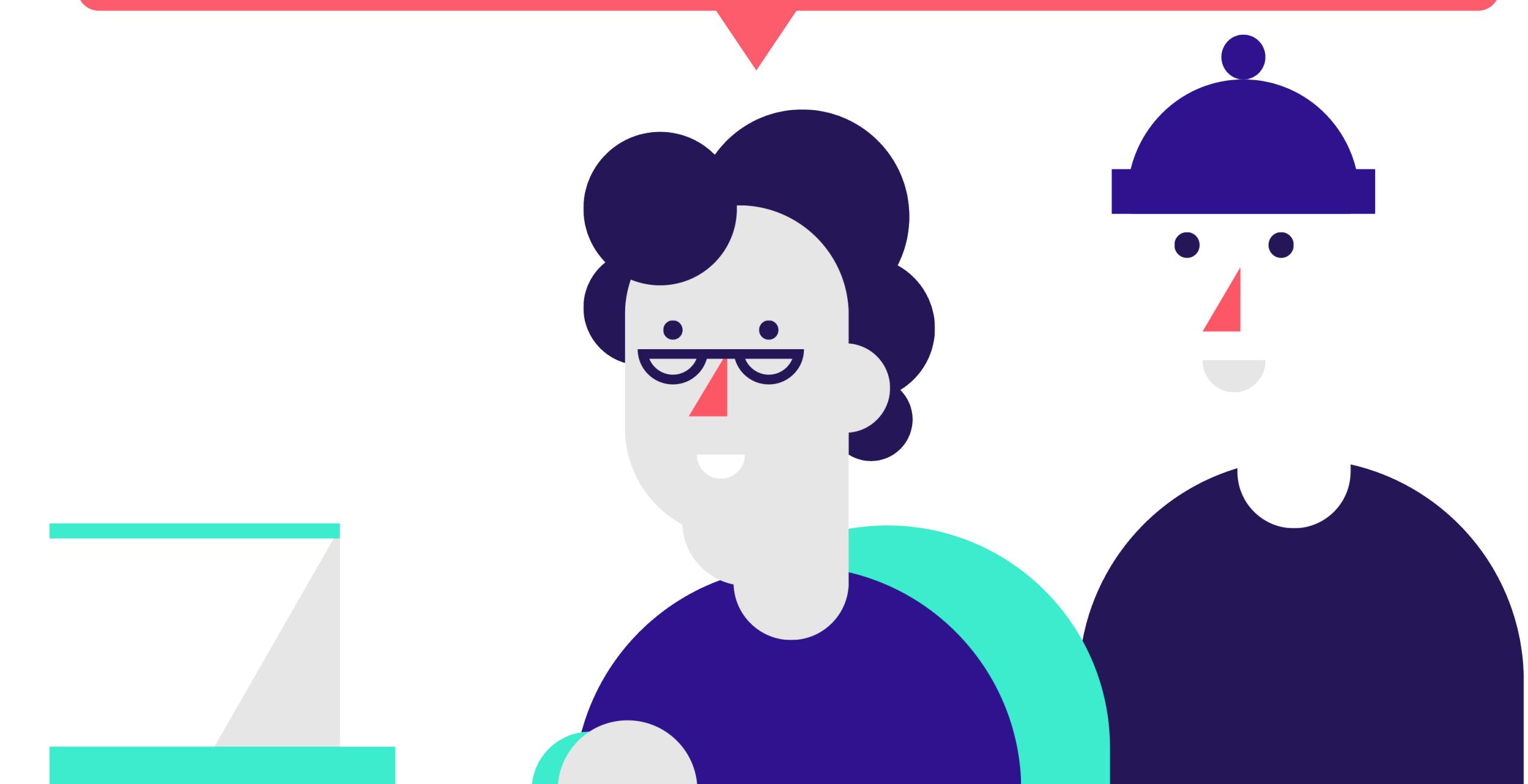
Types of communication...

“Sometimes you speak to humans and you really haven’t moved forward much...”

“If you have to wait a few hours, you might have plans... You call when it is convenient for you.”

“Difficult to speak to call centres in India - communication issues... ability to understand what we are talking about.”

“I’d take time to word an email properly and that might not reflect how I’m feeling. Sometimes it’s important to let someone know how you’re feeling.”



Complex urban planning enquiries experience

User experience



Complex urban planning enquiries experience

User Stories

Awareness / Push	Meeting	Follow up	Escalation	Response
<p>I want to aware of things happening in my community So I can respond and ensure I live in a safe place</p>	<p>I want to meet with the council So I can ask questions and express my concerns and objections in person</p>	<p>I want to be kept informed So I can know I have been heard</p>	<p>I want to contact someone with authority So I can make my voice heard</p>	<p>I want to have a considered response So I can know my voice has been heard</p>
<p>I want to be kept informed of community updates So I can respond and challenge anything I don't agree with</p>		<p>I want to be kept informed So I can understand the council's next steps</p>		<p>I want to have information and justifications for proposed plans So I can understand reasons and impacts on my community</p>
<p>I want to check if the community is already engaged in a process So I can figure out if I have to take responsibility</p>				<p>I want to have information and justifications for proposed plans So I can judge if the council has made a well informed decision</p>

Experience map - Plans, Infrastructure and Community Impact

Highways: Surrey County Council

	Push: Awareness	Community Meeting	Follow Up	Escalation	Resolution
User Needs	I want to be kept up to date with community news So I can respond and challenge plans I don't agree with	I want to meet with the council So I can express my concerns and objections	I want to be kept informed So I can know my voice has been heard & find out next steps	I want to contact someone with authority So I can make my voice heard	I want to have a considered and informed response So I can understand justifications and impacts on my community
Actions + Tasks	<ul style="list-style-type: none"> ▶ Stay engaged with community ▶ Be aware of issues ▶ Capture evidence 	<ul style="list-style-type: none"> ▶ Meet with council as a result of council comms ▶ Express concerns and objections, ask questions 	<ul style="list-style-type: none"> ▶ Read follow up communications from the council 	<ul style="list-style-type: none"> ▶ Contact councillors ▶ Contact MP's ▶ Contact Borough Councils 	<ul style="list-style-type: none"> ▶ Read follow up communications from the council ▶ Evaluate next steps
Channels + Devices	 IN PERSON  PHOTOS: PHONE  COMMUNITY HUB  RESIDENTS NEWSLETTER	 LETTER FROM COUNCIL  IN PERSON	 LAPTOP  EMAIL	 MOBILE  LAPTOP  LETTER	 LAPTOP  EMAIL
Emotional	"Parking is a nightmare in our driveway. I can't police it myself!" "It's already dangerous, this is going to make it worse"	"We left feeling like we weren't listened to and that nothing will come of it"	"It was a platitude - 'we have heard your concerns' - it wasn't meaningful"	"I would have at least expected an acknowledgement to my email. I got none from either"	"I got a curt response from the MP that infrastructure is not taken into consideration in planning"
Pain Points	<ul style="list-style-type: none"> ▶ Historical / systematic issues ▶ Issues getting progressively worse ▶ Frustration with lack of proactivity / action 	<ul style="list-style-type: none"> ▶ Speaking to a representative with no apparent authority - opinions not recorded ▶ Decisions had already been made - meeting more of a formality 	<ul style="list-style-type: none"> ▶ Feeling like voicing concerns have got me nowhere ▶ Realisation of poor inter-department communication / planning within councils 	<ul style="list-style-type: none"> ▶ Understand a need for prioritisation - but not even a reply or acknowledgement 	<ul style="list-style-type: none"> ▶ Not feeling listened to - email / letter can get lost with all the others ▶ Frustration at lack of collaboration between council departments
Compelling forces	<ul style="list-style-type: none"> ▶ Anxiety: health and safety fear ▶ Push: current practical impact and inconvenience on life and community 	<ul style="list-style-type: none"> ▶ Anxiety: my voice has not been heard / what will happen now ▶ Push: at council's mercy 	<ul style="list-style-type: none"> ▶ Anxiety: hopelessness ▶ Push: getting nowhere means I have to try alternatives to get my voice heard 	<ul style="list-style-type: none"> ▶ Anxiety: options running out to get some meaningful action ▶ Anxiety: no reassurance that decisions are well informed and considered 	<ul style="list-style-type: none"> ▶ Anxiety: fear at lack of rationalisation or information on anticipated changes to community (traffic / parking)

Reporting an issue or Requesting an improvement experience

User experience



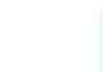
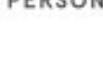
Reporting an issue or Requesting an improvement experience

User Stories

Awareness / Push	Search	Report	Response	Resolution
<p>I want to take responsibility to report issues So I can do my civic duty</p>	<p>I want to know who is responsible for different issues in the community So I can get in touch with the right person / organisation</p>	<p>I want to report an issue So I can assign responsibility to the council to get it fixed</p>	<p>I want to be kept informed So I can know I have been heard</p>	<p>I want to see that the problem is being resolved So I can have peace of mind</p>
<p>I want to be aware of things happening in my community So I can respond and ensure I live in a safe place</p>		<p>I want to report an issue So I can get the council to make my community safer / better</p>	<p>I want to be kept informed So I can understand the council's next steps</p>	<p>I want to chase up the council So I can ensure my voice is heard</p>
<p>I want to know what qualifies as an issue So I can get in touch about issues the council will / can resolve</p>		<p>I want to report an issue So I can get the council to make my personal circumstances better</p>		<p>I want to chase up the council So I can ensure the council is going to resolve the issue</p>

Experience map - Report / Request

Highways: Surrey County Council

	Push: Event	Search	Report / Request	Response	Resolution
User Needs	I want to be aware of things happening in my community So I can respond and ensure I live in a safe place	I want to know who is responsible for different issues So I can get in touch with the right person / organisation	I want to report an issue / request improvements So I can get the council to make my community safer / better	I want to be kept informed So I can know I have been heard and understand council's intended next steps	I want to see that the problem is being resolved So I can have peace of mind
Actions + Tasks	<ul style="list-style-type: none"> ▶ Be aware of issues ▶ Capture evidence 	<ul style="list-style-type: none"> ▶ Google: "How to report a pot hole?" ▶ Search local directory ▶ Connect with community 	<ul style="list-style-type: none"> ▶ Report issue on council website / third party website ▶ Write and submit report with requested changes 	<ul style="list-style-type: none"> ▶ Wait for a response by the council 	<ul style="list-style-type: none"> ▶ Check results, or, ▶ Follow up comms to try and resolve issue, or, ▶ Give up
Channels + Devices	 IN PERSON  MOBILE PHOTOS	 LAPTOP  DIRECTORY  GOOGLE  WEBSITE	 LAPTOP  REPORT  WEBSITE  CTC  POST	 MOBILE  LAPTOP  CALL CENTRE  EMAIL	 IN PERSON  MOBILE  LAPTOP  CALL CENTRE  EMAIL
Emotional	"There is an outcry on the condition of Surrey roads" "Emergency vehicles can't reach us! Its a safety issue!"	"I didn't know who was responsible for painting yellow lines. I had to call the borough council and ask"	"I wont report it on the spot because I'm driving! I'd like to do it on the laptop (bigger screen)"	"It just goes into the ether - it would be nice for the council to respond and tell me what they are going to do about it"	"Seeing that neon spray paint is reassuring" "We are not asking for anything outrageous"
Pain Points	<ul style="list-style-type: none"> ▶ Feeling that council is apathetic ▶ How resources are shared / applied across different areas 	<ul style="list-style-type: none"> ▶ Don't know who is responsible for different tasks ▶ Don't know what process to follow / how long it will take to get a resolution 	<ul style="list-style-type: none"> ▶ Common occurrence - especially for cyclists ▶ Don't know how councils are organised - who to contact to get intended result 	<ul style="list-style-type: none"> ▶ Not getting a response ▶ Not knowing if the council is aware of concern ▶ Not knowing when things will get fixed 	<ul style="list-style-type: none"> ▶ Time taken to get a response ▶ Need to re-engage if no response ▶ Feeling that a minimum safety request is de-prioritised
Compelling forces	<ul style="list-style-type: none"> ▶ Push: it is my civic duty to do something about this ▶ Anxiety: this is a safety risk to me and my community 	<ul style="list-style-type: none"> ▶ Habit: Google it / directory ▶ Anxiety: Will this get fixed? How long? 	<ul style="list-style-type: none"> ▶ Push: clear and visible online functionality 'report it' ▶ Anxiety: Will this get fixed? How long? 	<ul style="list-style-type: none"> ▶ Push: not getting a response might warrant a follow up call ▶ Anxiety: Will this get fixed? How long? 	<ul style="list-style-type: none"> ▶ Pull: ability to use road safely again ▶ Anxiety: problem still not fixed - not feeling heard or valued

Drivers for choosing communication channels

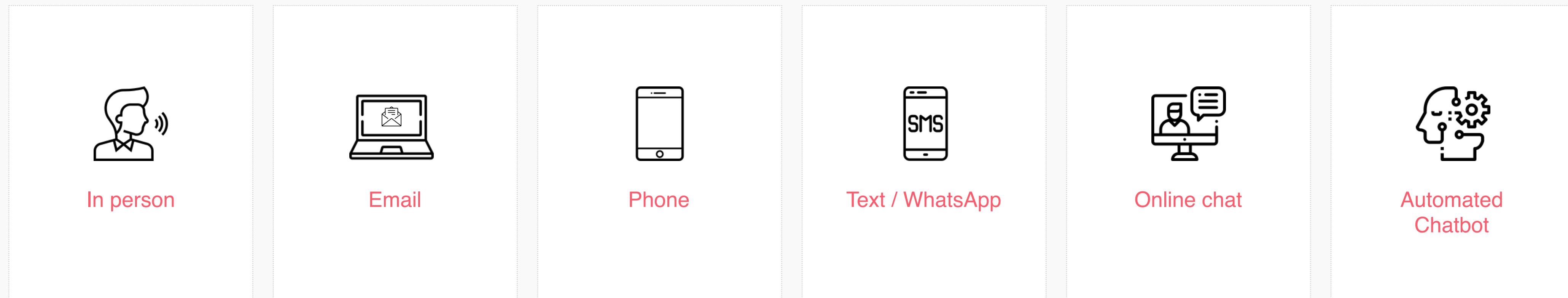
Insights were gathered across all service themes on peoples **attitudes, perceptions and preferences** for communication channels.

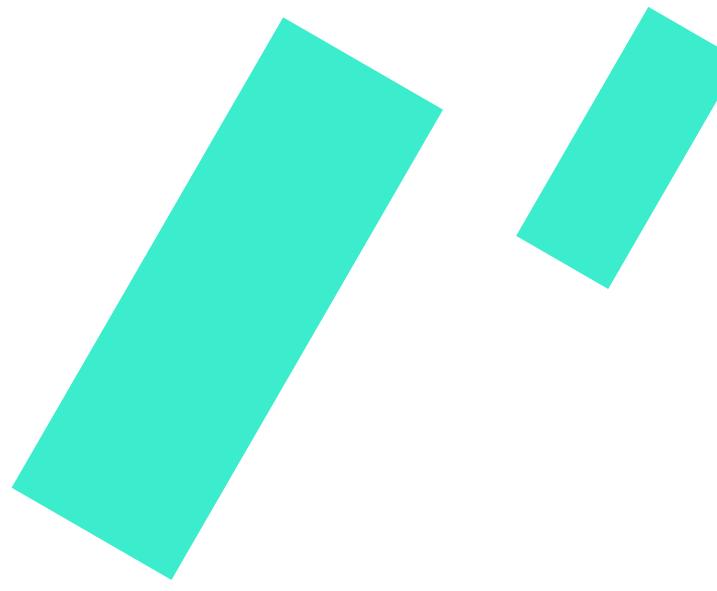


Drivers for choosing communication channels

How users perceive channels

There were some strong trends coming across the service themes. We have outlined users' preferences towards each channel based on **what it enables them to do** or **how it hinders them**. These include:

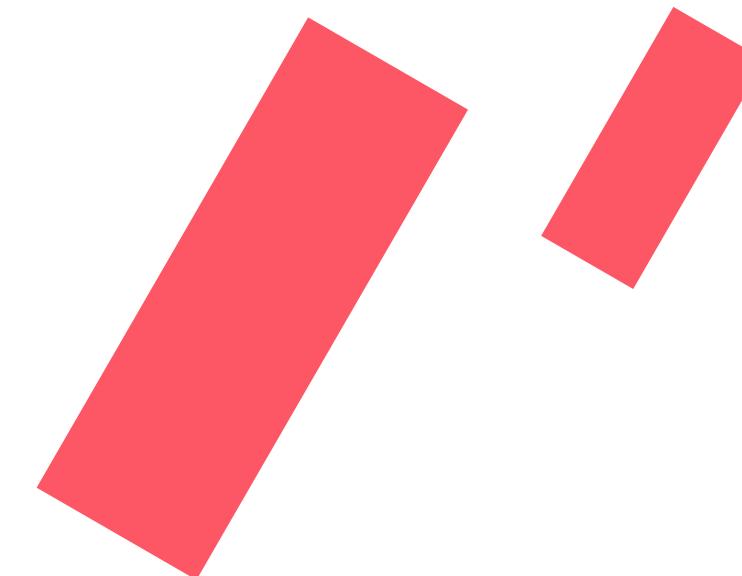




How users perceive channels

In person - Users are able to...

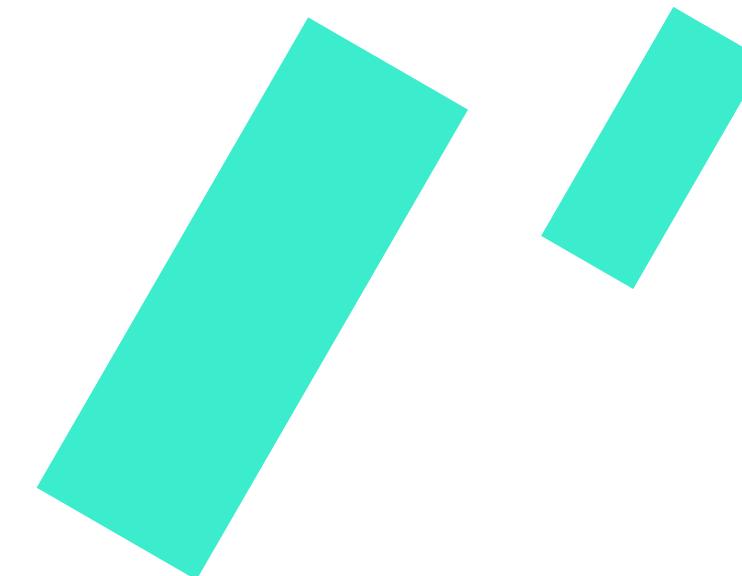
- Build a rapport and relationship with another person
- Read body language
- Communicate complex and detailed information
- Physically point out specifics in physical documents and media
- Get formal receipts when documents are handed over to the council



How users perceive channels

In person - Users are hindered by...

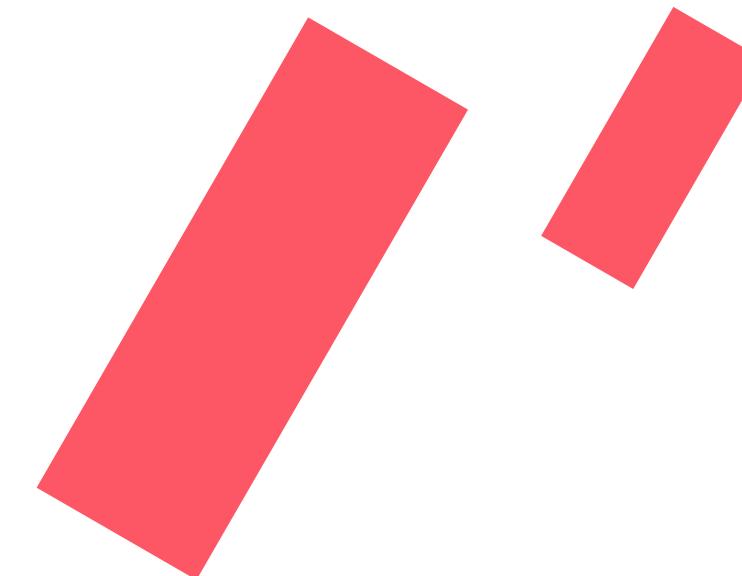
- ▶ Inconvenience - the need to do this during working hours or having to take time off work
- ▶ (Planning specific) Being unable to send documents ahead of time
- ▶ (Planning specific) Not being assigned to a specific case worker - so having to start every conversation from scratch
- ▶ Tight meetings - not being able to have prolonged periods of time with council staff



How users perceive channels

Email - Users are able to...

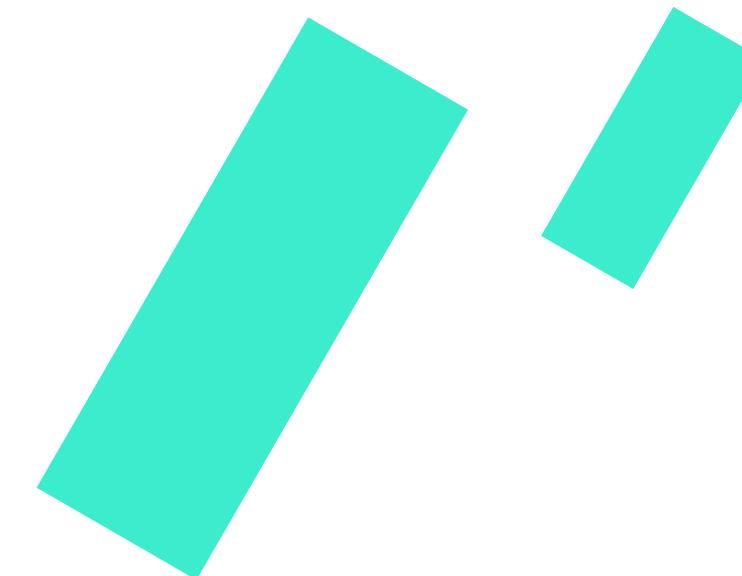
- Add more detail within the text
- Take a more considered and planned approach
- Have an accurate historical log of all conversations - enabling accountability, memory and reminders
- Attach files and documents
- Get a quick response when not in a hurry - expectations are three days, or a working week at the latest
- Read at their own convenience and pace
- Take time to find information they need to respond appropriately
- Reply in a formal format and channel



How users perceive channels

Email - Users are hindered by...

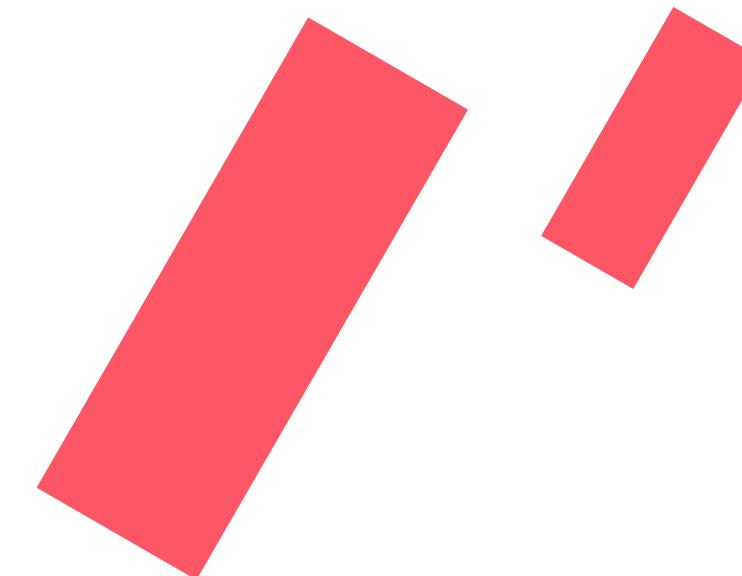
- ▶ An impersonal one way conversation
- ▶ Taking longer to get a response than a phone call
 - not a dynamic interaction
- ▶ No confirmation emails - uncertainty if email has been received / read
- ▶ Getting pushed down the queue / getting lost in a large volume of emails
- ▶ Inability to understand tone / ability to misunderstand content
- ▶ User's bad eyesight
- ▶ Not being tech savvy
- ▶ Skip-reading emails (compared to reading every word on letters which are more formal)



How users perceive channels

Phone - Users are able to...

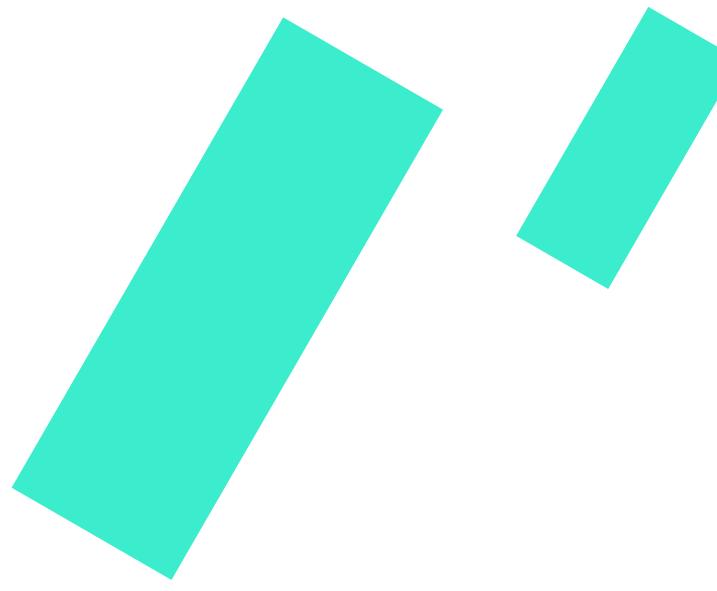
- Get a quick or immediate response
- Follow up on emails if they are not getting a response
- Have a dynamic conversation and dialogue
- Scheduled phone call to fit within a busy day
- Express and understand tonality
- Feel heard and get reassurance
- Feel like they are getting a ‘proper service’
- Handle complex queries
- Assign more accountability (get a name / tell council to expect an email)
- Clear ambiguities and articulate reasonings
- Have a personal interaction



How users perceive channels

Phone - Users are hindered by...

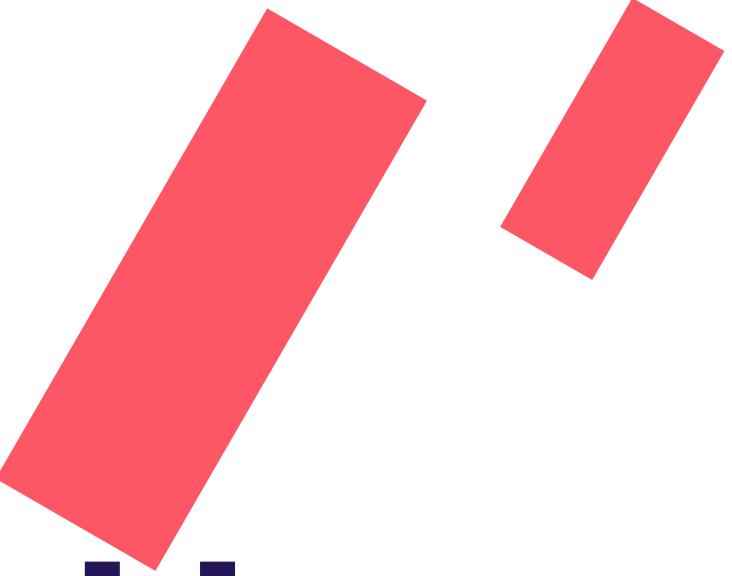
- ▶ Having to wait in queues or on hold
- ▶ Bad timing of inconvenient impromptu calls
- ▶ Forgetting to say everything you wanted to say or ask in the moment
- ▶ Anxiety of having to speak on the phone
- ▶ Wasting the council's time for simple enquiries
- ▶ Inability to see peoples faces
- ▶ Fear that councils could deny that the call happened if calls aren't recorded or followed up by an email
- ▶ Poor hearing
- ▶ Unidentified numbers - users don't like to pick up the calls from people they don't know
- ▶ Not having answers on the tip of their tongue (both the user and council staff)
- ▶ Not being able to schedule a call back due to working hours



How users perceive channels

Text / WhatsApp - Users are able to...

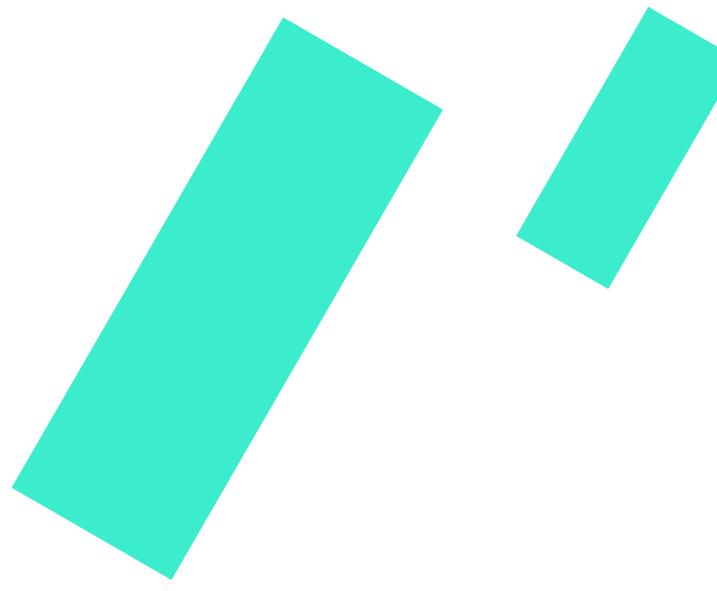
- Read and respond at their convenience
- Communicate in a quick and easy way
- Keep communication short and sweet
- Have a log of conversations
- Can share images for free (WhatsApp)
- Quietly text at work



How users perceive channels

Text / WhatsApp - Users are hindered by...

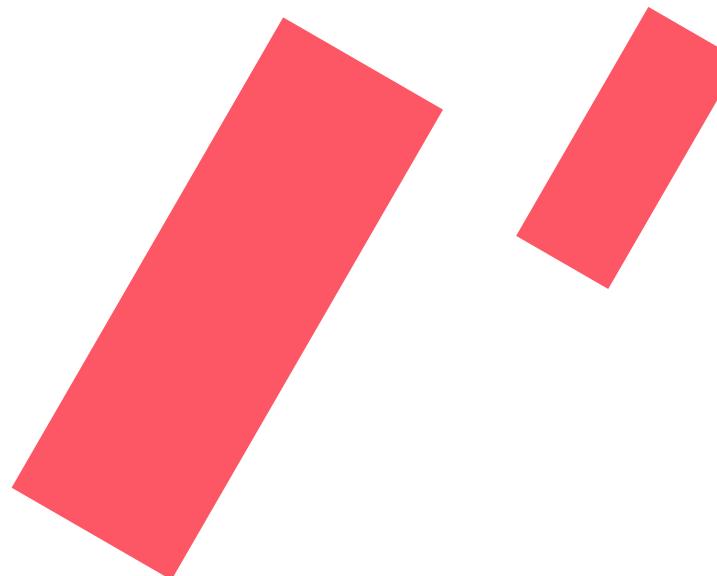
- Channel is not perceived as being professional
- Message can get misconstrued (shorter messages and writing style)
- Communication is staggered
- It costs to share images by SMS
- Lack of flexible dialogue (users don't feel like it is as reactive as speaking)



How users perceive channels

Online chat - Users are able to...

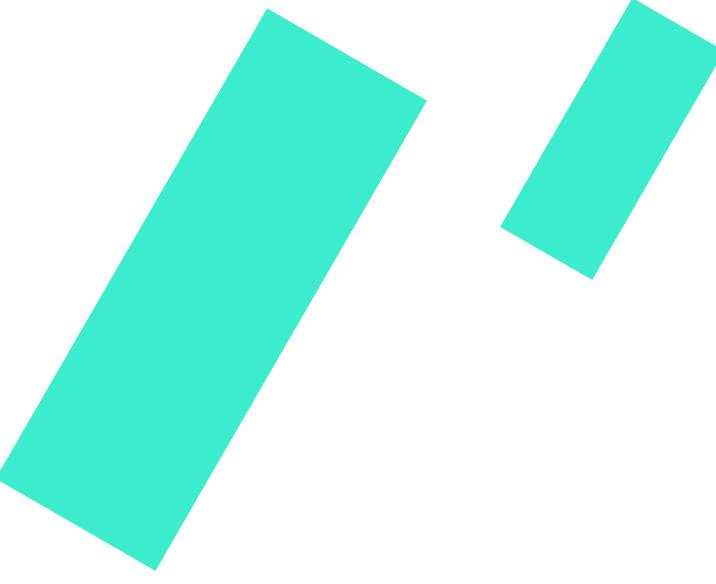
- Copy and paste excerpts from emails
- Ask questions and get a response
- Get in touch with someone who is knowledgeable and can help resolve their issue
- Have the convenience of out of hours support



How users perceive channels

Online chat - Users are hindered by...

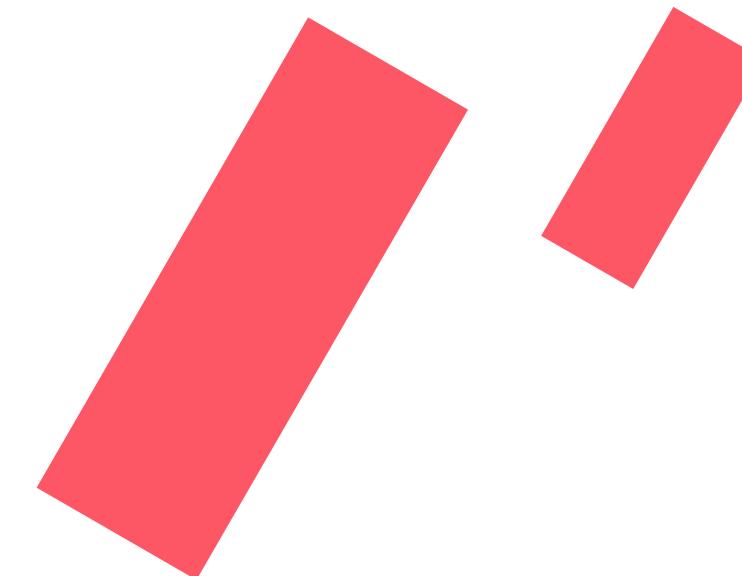
- ▶ Unresponsive interaction
- ▶ Delays in conversation or response
- ▶ Time spent typing - it could be much quicker to explain an issue by talking
- ▶ Support staff who are not knowledgeable and are just doing what the system tells them to



How users perceive channels

Automated Chat Bot - Users are able to...

- Get answers to simple questions
- Get things done more easily - have barriers removed for convenience



How users perceive channels

Automated Chat Bot - Users are hindered by...

- The fact that it doesn't always work - it could be a waste of time
- It might not be able to answer nuanced questions or solve complex issues
- It might not understand what they are saying - or have to try harder to use plain English
- Fear of not knowing how to interact with it
- It will make them feel like what they have to say is not important
- Fear that it is just going to redirect them to customer support anyway - it could be a waste of time
- Perception that they have to 'chat' - instead of just focus on getting their job done
- Fear of being 'watched' - some users do not understand how digital technologies work

Research Methodology & Findings

Trends and observations

Across the research themes we observed some key trends and patterns in our findings.



Key user needs and expectations





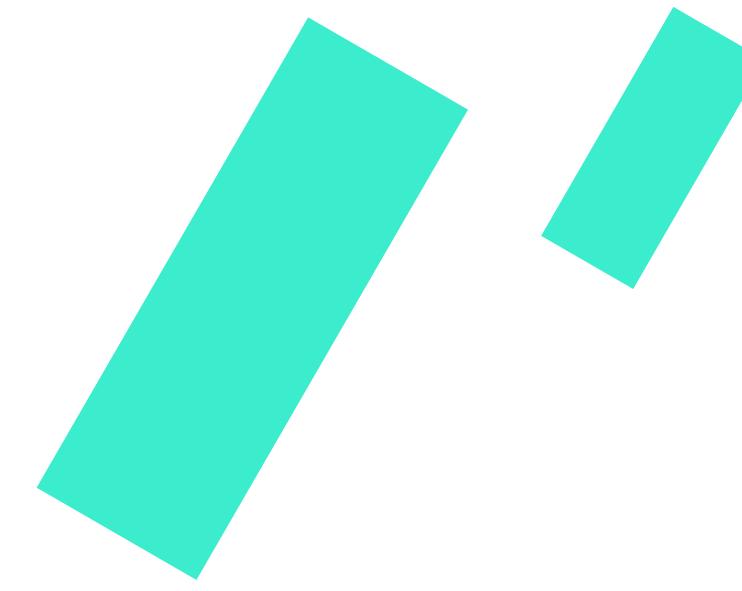
Key user needs and expectations

Users want to feel heard

Users want to feel like their voice has value. Personal interactions and timely, informed and detailed emails make people feel like they are getting ‘a proper service’.

Whilst some users expect to get support in getting their ‘job’ done, some users don’t expect to always get their way, but they do expect, at least, a response. Some users just feel the need to have their sentiments and opinions heard.

However, the vast majority of users expressed their understanding that there are limited resources. That they understand that councils are under financial pressure, and that there are greater priorities at play than their own needs.



Key user needs and expectations

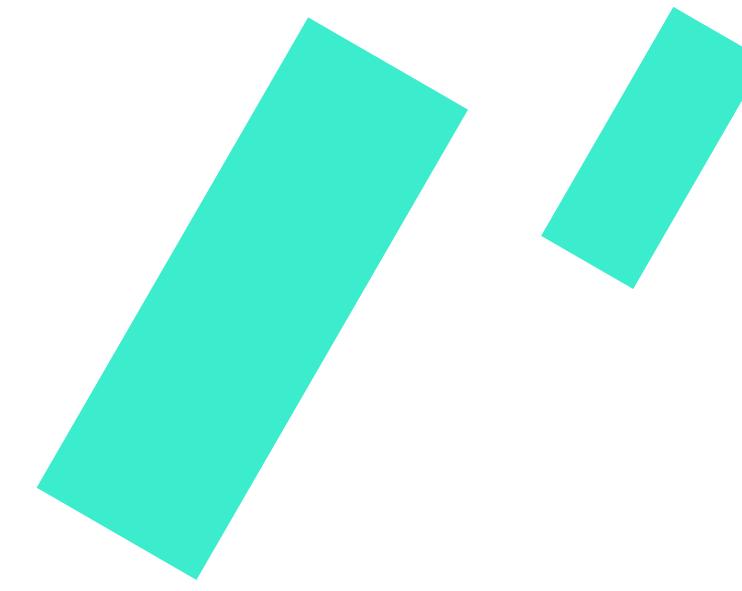
Users have high expectations

Users have high expectations led by the modern private service industry. Most people will have a good understanding of what a good service looks like, and at what point they would consider making a complaint.

They expect communication turnaround times to be short and customer support teams to be knowledgeable and caring. Whilst they understand that councils are local government services, they still expect a good standard of service as a tax payer.

Users are also stuck - they know there is no alternative. They cannot switch to a competitor - this exacerbates the frustration when services don't meet their standards or expectations.

However, users understand that local government services are limited in resources and don't expect, for example, for staff to work 24/7.



Key user needs and expectations

Users want to feel safe

Ultimately, users need to feel safe in the hands of the council. Users tend to contact councils or government services when they need to act on something important or fundamental. It is vital for users to feel reassured that their reason for contacting has been logged and that appropriate action will be taken.

The more important their reason for contacting, the more trust and reassurance they require to have peace of mind.

Users will seek ways to hold councils or individual council staff accountable for getting their ‘job’ done.

This is again particularly true as people do not have a choice. There is no competitor that they can switch to if the council does not meet their expectations.



Key user needs and expectations

Ultimately...

“To a user, a service is simple.
It’s something that helps them to do something.”

gov.uk

Best Practice

A good government service...

[gov.uk](#)

- A user can do what they need to do, from start to finish
- What the service is for and what it involves is clear
- A user has to do as few things as possible
- How decisions are made is clear
- There are no dead ends
- The service is consistent
- It's straightforward to get human assistance
- The service works in a familiar way
- Internal structures are not shown to users
- Everyone can use and understand the service
- The service is easy to find
- Users and their information are treated with care and respect

Drivers for calling the council



Drivers for calling the council



Perceived value and utility



In person

personal, formal, bureaucratic



Text

quick, simple, convenient



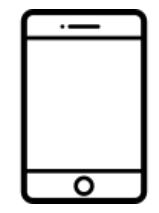
Email

considered, detailed, formal



Online chat

dynamic, convenient, expert support



Call

personal, dynamic, reassuring



Automated chat bot

convenient, simple, transactional

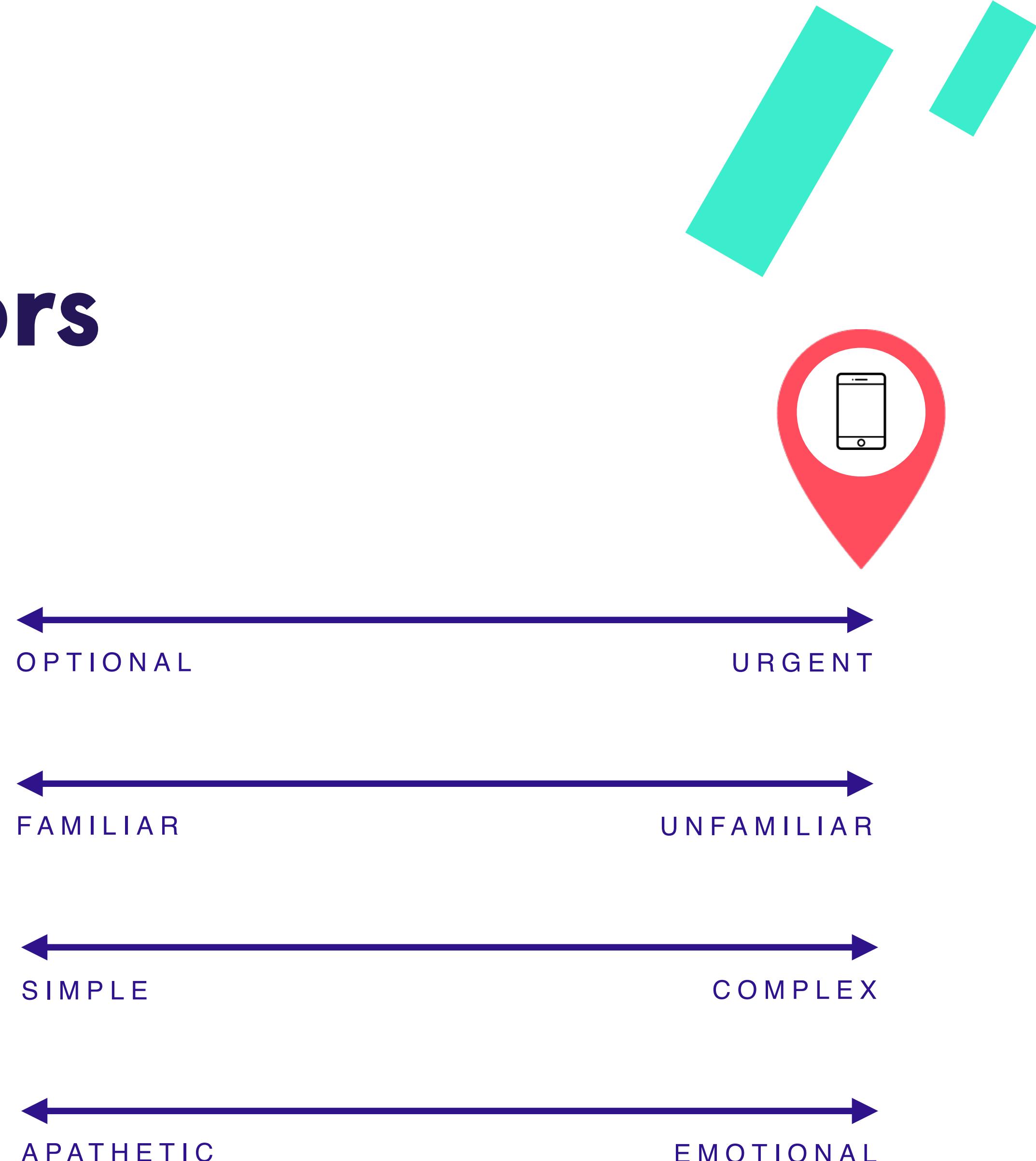
Drivers for calling the council

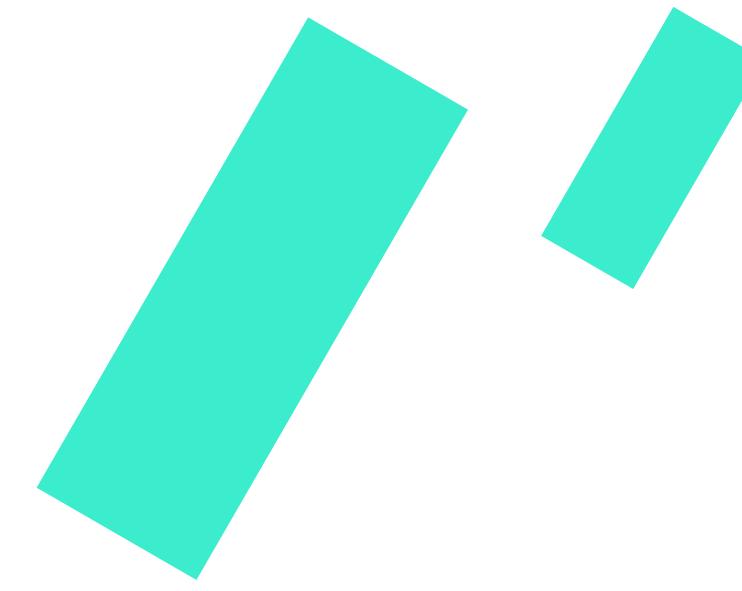
Key contributing factors

Throughout all the service themes we have identified key contributing factors to users' experiences which affect the 'first port of call' communication channel of choice.

Users with tasks which are complex, urgent, unfamiliar or of an emotional nature are more likely to opt for a phone call.

Users with tasks which are simple, familiar or optional - with users who feel generally passive - are more likely to opt for alternative channels.





Drivers for calling the council

Calling the council

Factors which contributed to calls to the council:

► **Is the task urgent?**

If a user is dealing with an urgent the task, the higher the need to speak to someone and get reassurance that it will get resolved.

► **Is the task unfamiliar?**

If dealing with a new or unfamiliar process, and if the information or ability to self-service is not available or easily accessible, then users will not hesitate to pick up the phone.

► **Is the task complex?**

If users cannot quickly or easily complete a task - if they require bureaucratic assistance, guidance or authentication - they are more likely to pick up the phone or use a blend of channels over a long period of time.

► **Is the task emotional?**

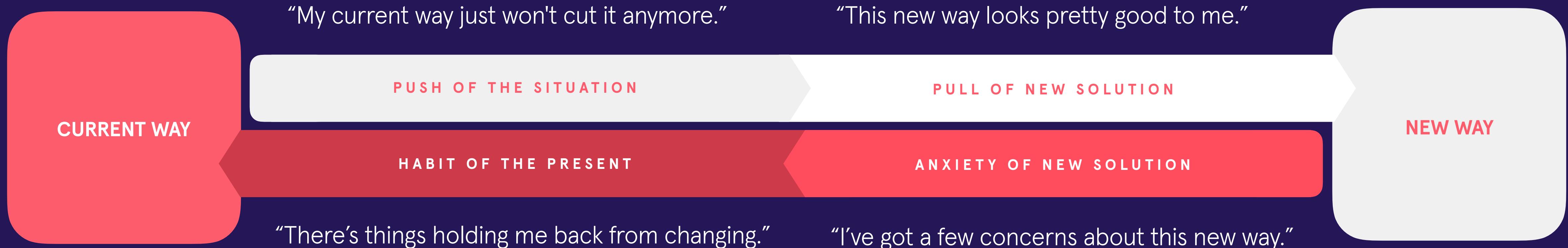
If a user is emotional or distressed - it will either be necessary to get additional assistance or reassurance over the phone. But sometimes, users just want to voice their feelings - particularly if they are angry, frustrated or resentful.

How to influence a switch in behaviour



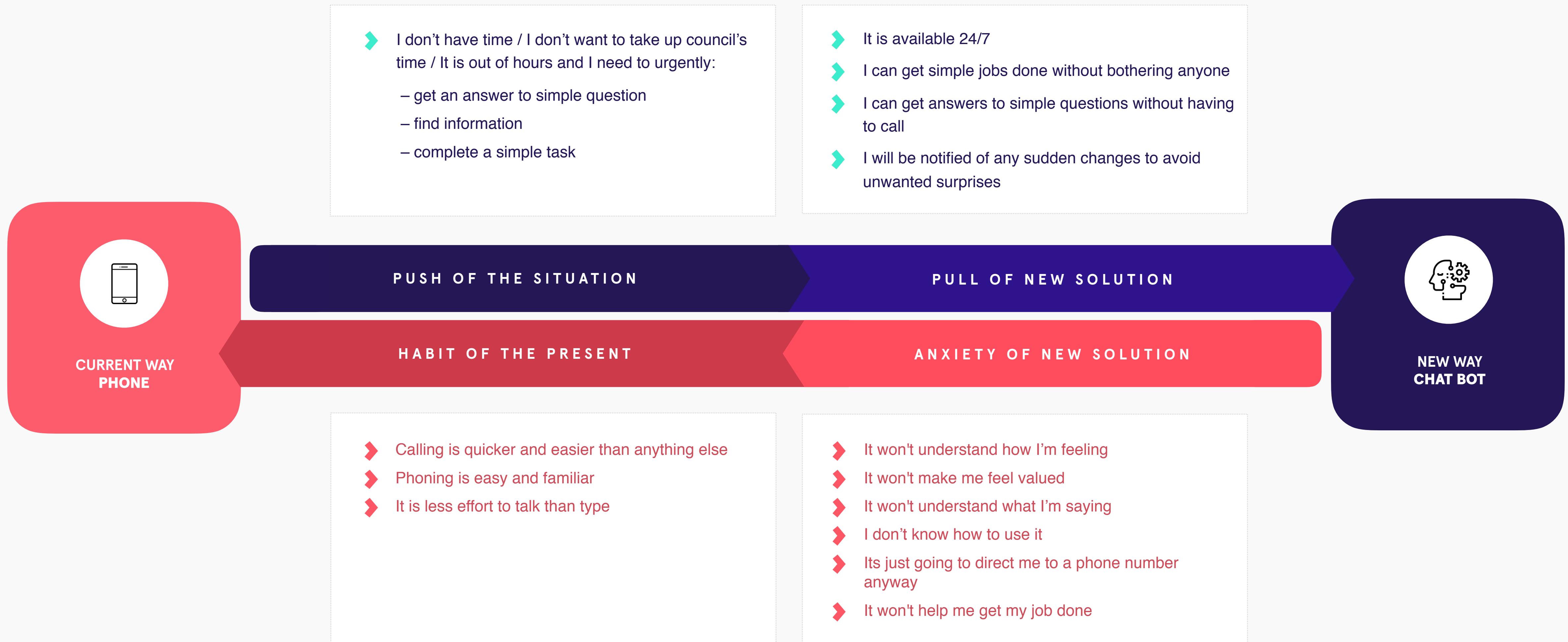
How to influence a switch in behaviour

Forces that influence customer switch



How to influence a switch in behaviour

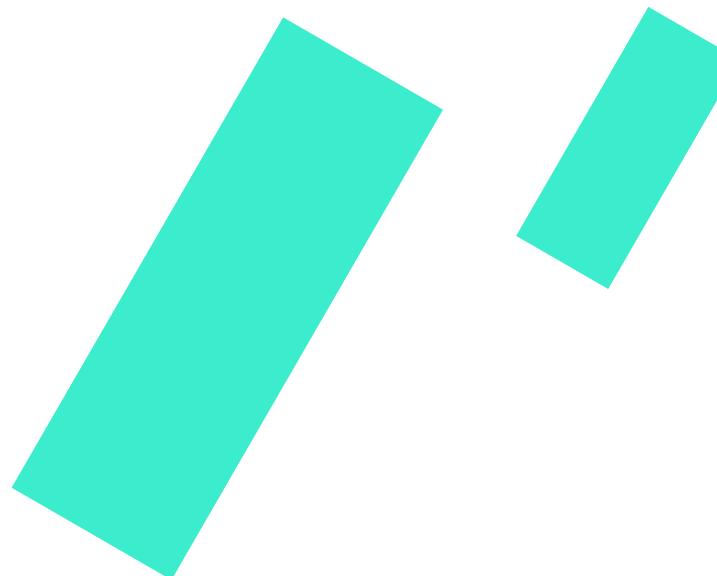
Forces that influence customer switch



User Research Summary Report

Conclusion

How user needs and current experiences should inform UX principles that guide design decisions and technology selection when considering a Chatbot solution.



Conclusion

Informing UX principles

User needs and current experiences can inform user experience (UX) principles that should guide future design decisions and technology selection when considering a Chatbot solution.

User needs:

- To get a 'job' done
- To feel heard and valued
- To have an informed answer
- To feel safe

User experiences can be:

- Urgent
- Complex
- Unfamiliar
- Emotional

UX principles:

- Ease, Speed & Responsiveness
- Self service & Accessibility (24/7)
- Proactivity, Information & Alerts
- Trust, Reassurance & Accountability

Torchbox