# registrations project: USABILITY testing – Housing Officers

## Research Plan

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| Time | Session / Exercise | Objective | Script | Resps. | Equipment |
| 13:00-13:05 | Introduction | * To introduce the project and today’s objectives * To answer any initial questions * To ‘warm up’ the participants, ahead of the session | Thank you for joining us for today’s session. We are from Social Finance, a team that is helping Worcestershire County Council look at ways that they can better use the data available to them.  We have been exploring some potential solutions for how we could make the housing process easier. The purpose of today is to understand a little more about your needs and to have you test this Alpha (very early stage) version we have created.  We have asked you along to help us because we believe that your role and experience means that your thoughts will be really valuable so please answer with YOUR thoughts, not with what you think we should hear or how you think others might use it.  Please note, there are no right or wrong answers – we are just keen to hear your thoughts and see how you use it.  With your permission, we would like to record this session to help us document the process and remember what happened during the session'. If you are happy for this to happen, could you please read this consent form and sign it. If you have any questions about this, just let me know. [present form].  Do you have any questions at this stage?  Some initial questions to start us off:  What is your role?  How long have you been doing the role?  What’s something that you are looking forward to doing in 2020? [this is to make it more relaxed and get them used to speaking aloud]. | RA to read | N/A |
| 13:05 – 13:10 | Diary Study | * To understand the current way of doing things and spot any additional needs / pain points / processes that weren’t picked up in the Discovery phase * To get the participant to reflect on the current way of doing things, e.g. the benefits and pain points * To have a benchmark for how long things take, advantages and disadvantages with the current process so that we can compare with the Alpha version | We asked you to complete a diary study ahead of today so that we could get an idea for the current way of being notified about a death of a tenant. The purpose was also for you to reflect on this.  It’s ok if you don’t have this today but please email Rachelle with [your completed data entries / the data she has requested] as so as you can.  We’d like to go through a few a questions with you to find out a bit more:   1. How did you find the diary study? 2. Did you manage to record any deaths? 3. How typical was the time period of the diary study for: 4. Number of deaths (e.g. was it unusually high) 5. Process, (e.g. the way you were notified) 6. Time taken to ‘complete’ 7. Were there any questions that you found particularly difficult? 8. [Look through the diary study and if there is anything else that you think is striking or any patterns that you want to know more about, probe]   *[IF NO DIARY ENTRY:]*  Please talk me through the last time you had to deal with a deceased tenant.   * 1. How were you first notified of the death of a tenant?   2. Was it the lead tenant? i.e. the tenant whose name was on the tenancy   3. What information were you given when you first heard about the tenancy?   4. How helpful did you find the information you have received and why?   5. What did you do next and why?   6. What information did you need to complete the tenancy?   7. How quickly do you need this information?   8. Roughly how long did it take you to close the tenancy in total?   9. Were there any challenges or barriers that you faced?   10. What was the most challenging part of the process?   *[WRITE KEY NOTES ON POST-IT NOTES, THEN PLAY BACK TO THEM TO CONFIRM KEY ACTIONS AND PAINPOINTS IN THE PROCESS]* | MH to lead, RA to support | Diary Entries printed out (we need to read them beforehand)  OR POST-IT NOTES |
| 13:10 – 13:30 | Card Sort | * To verify the data fields and discover if there are any that we are missing / need to add / can drop * To understand which data fields are most crucial and the implications of not having these | Now, thinking about a typical example of when you have had to deal with a deceased tenant, I would like you to think about the process that you go through and the information that you need in order to either update the contract with a new lead tenant or close the tenancy.  I’m going to give you a pack of cards and on each card, I’d like you to write down a piece of information / data that you need as part of this process, for instance, ‘Name’.  We will give you 5 minutes to write everything down, but it might not take that long.  *[PARTICIPANT WRITES EVERYTHING DOWN]*  Now, I’d like you to talk me through each of the things that you’ve written on the cards, one by one.  *[PARTICIPANT TALKS THROUGH, MODERATOR PROBES, E.G. ‘WHY?’, ‘WHAT ABOUT DOCUMENTATION?’ PROBE AROUND DATA VS. DOCUMENTATION, WHAT PART OF THE PROCESS DOES THIS, E.G. DEATH CERTIFICATE, COME INTO PLAY, KEY PROBE IS TO FIND OUT INFORMATION YOU* ***MUST*** *HAVE IN ORDER TO CLOSE TENANCY, E.G. WHAT WOULD HAPPEN IN IF YOU DIDN’T HAVE THIS INFORMATION?]*  Now, I’d like you to order the cards, with your most important on the left and your least important on the right.   1. Why did you select this order? 2. Why is this [e.g. one at the beginning / middle / end] most important? 3. What is a typical timescale for needing this kind of information? How quickly do you need it? 4. What next of kin info do you need, and why?   Now, I’d like you to shortlist the 5 most important ones you need to complete the process.  *[PARTICIPANT TALKS THROUGH, MODERATOR PROBES, E.G. ‘WHY?’]* | MH to lead | Sharpies Artefact cards |
| 13:30 – 13:40 | Use Cases | * To understand what the process of getting the data is like in particularly tricky situations * To validate that missing ‘next of kin’ information is also the main issue / barrier in organisations with larger volumes (we hope to find this out via Hackney) * Getting them to think about scenarios where it’s been tricky (to put them in the headspace) | We’d like to understand a bit more about when it hasn’t been that straightforward to get the information that you need.  *[ONLY ASK Q To HACKNEY]* Tell me about a situation when it was particularly difficult to get the information you needed?   1. What happened? 2. What was particularly tricky about it/ what was the biggest barrier? 3. How was it resolved?   *[ASK ALL LOCAL AUTHORITIES]* Tell me about a situation when it was particularly difficult to get information on next of kin   1. What happened? 2. What was particularly tricky about it/ what was the biggest barrier? 3. How was it resolved?   Tell me about a situation when the only information you had was the name of the deceased.  A) What happened?  B) What was particularly tricky about it/ what was the biggest barrier?  C) How was it resolved?  Tell me about a situation when the only information had was just the name of the next of kin and no other information.  A) What happened?  B) What was particularly tricky about it/ what was the biggest barrier?  C) How was it resolved? | RA to lead | Post-it notes  Sharpies |
| 13:40-14:00 | Usability Testing | * To understand / verify what it’s like to use Tell Us Once, i.e. the general process (so that we can benchmark) * Share the Alpha and get direct feedback * Observe the participant using it (without interruption or probing) * Get usability metrics on: time on task; clicks in error; task success | Let’s talk a bit more about when you use the Tell Us Once PDF.   1. Do you use it? Does someone in your team use it? 2. What’s the trigger / routine for using it? E.g. a time every week or it just comes as-and-when? 3. How do you receive them? E.g. frequency / volume? 4. What’s your process? 5. What’s the volume and frequency? 6. How often do you receive the TUO after you have already been notified of the death? 7. What’s the typical time between date of death and contacting the next of kin listed on the TUO form?   We would now like to share with you a potential alternative to getting information of deceased tenants with you. It is in its early stages but we would be interested to get your thoughts on it.  You usually get the information that will help you contact the next of kin, via [the TUO]. We are now going to send you information on the deceased tenants in a different way. These will be a mix of council and non-council people. We would like you to show us the process you would go through to check the records and find the relveant next of kin contact details. The end of the taks is you finding a way to contact the next of kin for all of the relevant council tenants we send you.  Please feel free to complete the activity as if you were at your desk and we weren’t here with you. I’m interested in seeing how this works for you, so don’t worry about a ‘right’ or ‘wrong’ way of doing it. As you go through, could you please think out loud; let me know what you’re looking at, what you’re trying to do, what makes sense and what doesn’t make sense. If something is difficult or confusing, it’s helpful for us to know this, because we know that we need to make something better. After we’ve finished the activity, or if we get to a natural stop before then, I’ll ask you some questions and we’ll have a chat about your experience of doing the activity. If you have any questions as we go through, I may not be able to answer them as I’m interested in seeing how you do this without anyone here. If you still have questions at the end, I’ll be able to answer them for you then.  *[TASK BEGINS WITH EMAIL ACCOUNT OPEN AND ON SCREEN. PARTICPANT RECEIVES REAL-TIME EMAIL WITH THE PDF TABLE. TASK WILL STILL BE TIMED EVEN THOUGH IT’S OUT LOUD, JUST TO GIVE A ROUGH INDICATION OF TIMING.]*  *[OBSERVER TO LOOK FOR THINGS LIKE]:*  How easy to open; how easy to navigate; click errors; task success; wider usability issues (locating the correct tenant’s contract on the CMS)   1. I noticed you did [xxx], why was that? 2. How did you find the task overall? 3. How did you find navigating the information? 4. How did you feel about the information offered to you? 5. What did you think of the data fields? (e.g. sufficient or needing any more) 6. What filters, if any, would you like to see? 7. How helpful would it be to have filters? 8. On a scale of Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree, how would you respond to the following statement: Overall, I am satisfied with the ease of completing the tasks in this scenario? 9. On scale of Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree, how would you respond to the following statement: Overall, I am satisfied with the amount of time it took to complete the tasks in this scenario? 10. How do you think this compares to the process you currently do? [LEAVE THIS OPEN TO SEE HOW THEY INTERPRET IT BUT THEN PROBE AROUND THIS METHOD VS. TUO; PROBE IN PARTICULAR AROUND TIME, EASE, LEVEL OF DETAIL OF INFORMATION] | MH to lead | Email copy, inc. dummy data (that will be sent)  ‘Research in Progress’ sign  Participant laptop (ideally at their desk) |
| 14:00 -14:05 | Wrap Ups | * To thank the participant * To give them the opportunity to raise anything else that they think could be relevant or any questions | Thank you for taking the time to test this with us this afternoon. Your input has been very valuable. Do you have any other questions or inputs you’d like to add? Is there anything you want to raise that you think we have missed?  Please feel free to contact me if there is anything else you would like to add or ask after this session. My email address is: Rachelle.angeline@socialfinance.org.uk | RA to lead | N/A |