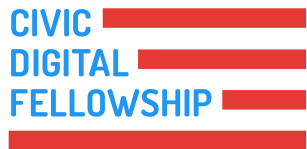


TOUCHPOINTS SURVEY TOOL

Customer Experience Cross-Agency Priority Goal

Matthew Ford — Deputy Chief Customer Officer
Feedback Analytics Team



BRITTNEY ATKINSON-MCFARLANE

New York University
Integrated Digital Media

PROBLEM SPACE

People expect government services to be **intuitive** *and* **efficient**

PROBLEM SPACE

Government service performance **fall short of expectations.**

PROBLEM SPACE

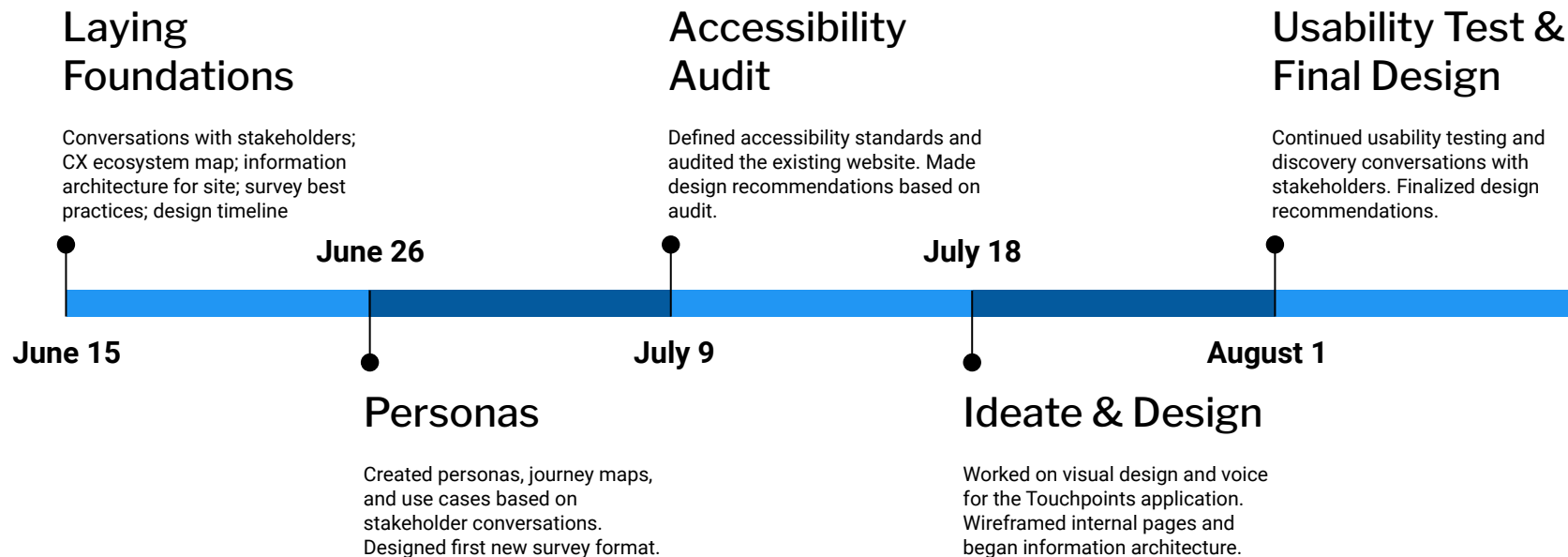
Obstacles to getting feedback from public.

SOLUTION

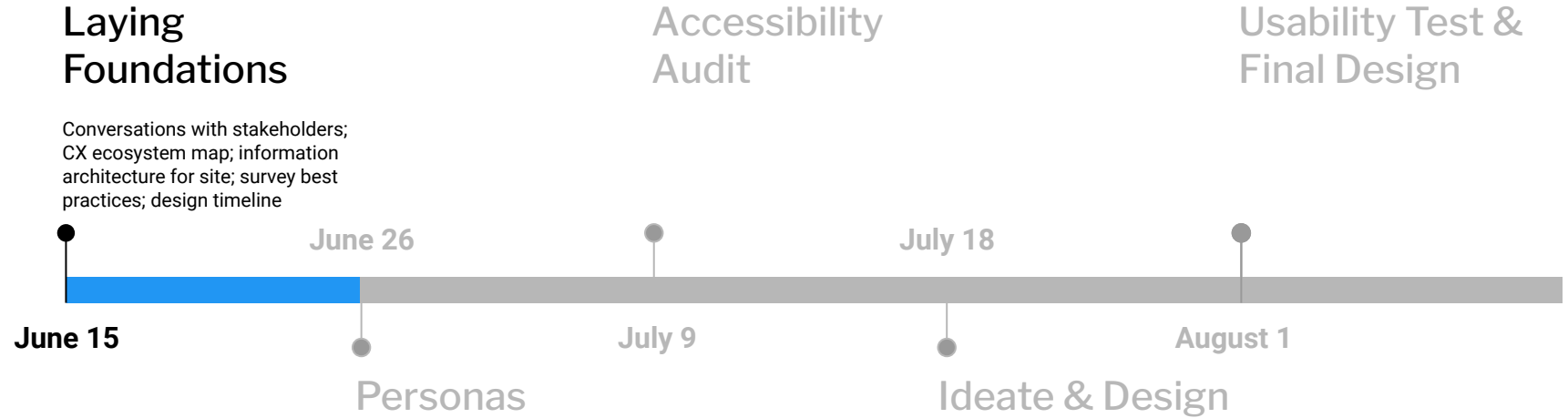
Touchpoints

A survey tool that centralizes customer feedback across services and shortens the PRA process

MY PROCESS



FOUNDATIONAL RESEARCH



LAYING FOUNDATIONS: 1 - 2 - 3 - 4

RESEARCH PLAN

Touchpoint Testing Plan

Discovery & Understanding

Timeline

6/11-6/13

Goal	Create actionable UX testing plan to forward Touchpoint launch
------	----------------------------------------------------------------

Action Items

Methodology	Objectives	Timeframe
The process I chose to collect information needed	The things I'd like to learn / things that will help the Touchpoint team	Loose timeline of processes
CX Ecosystem Mapping	- Understand stakeholder interactions with Touchpoints tool	~40 minutes to get to final map DUE 6/11
Competitive Analysis	- Understand survey tool design best practices - Answer: what's TP competitive advantage? - Outline baseline features for TP tool	6/13
Current Information Architecture	- Outline existing features of Touchpoint tool - Define the use and purpose of existing / desired pages	~15-20 minutes to draw draft map 6/13
Proposed Information Architecture	- Connect with Ryan about IA for TP tool (?)	6/13

Milestone

Milestone Name	Objectives	Due Date
Create UX Research Plan	<ul style="list-style-type: none"> ✓ Share WIP folder with TP team ✓ Pivot and refocus on likert scale best practices ✓ Add UX testing Qs for survey verbiage 	6/12/2019

Method Explanation

Competitive Analysis (source)

Comparison of features, content, visual style, and usability to understand best practice offerings

Card Sorting (source)

Develop informational/ navigational structure for touchpoints

1. Write the existing pages of touchpoints on various note cards.
2. Mix cards and present to participants.
3. Ask to rank cards from most to least important.
4. Have them explain the decision they made.
5. Have participants group cards by whatever feels appropriate to them.
6. Have them name the groups.
7. (?) Have participants place cards on a mockup website / where on the site would make the most sense.
 - a. This would include additional cards like logo, graphic, help, terms and conditions, etc.

Think Aloud

Determine user's expectations and identify what parts of the TP system are confusing

1. Explain instructions.
2. Have participants introduce themselves and their task at hand.
3. Have participants log in and explore the TP system while narrating their thoughts.
4. Provide tasks (7 - may be difficult)
 - a. Create a survey using an open-ended form template
 - b. Add a service
 - c. Define a touchpoint
5. Services → what do you expect from this page? Does it function how you expected it to?
6. Touchpoint → what do you expect from this page? Does it function how you expected it to?
7. Form Templates → what do you expect from this page? Does it function how you expected it to?

Participatory Design (toolkit)

Involve key stakeholders in design process of TP

Outline various pieces of the website on small cards or notes.
Have a blank website that participants can see and use.
Have participants name page they're working on.
Use the cards to add "content" to the pages.
Share and debrief.

Best Practices

Hi there! Today, 6/13, I did a bit of digging on likert scale best practices and service design. Since there's been a bit of pushbacks from HSPs about personalizing their A11 survey, I thought a bit deeper about what the TP experience would look like on the user/agency side. To highlight the importance and usefulness of likert scales, it may be worthwhile to include a version of the table below on the touchpoints site. I'm hoping that explaining the use of likert scales will increase HSP trust in the TP statement wording.

Importance of Likert Scales

Likert Scales leverages a bipolar scaling method to measure the extent of which a participant feels positively or negatively about a statement. The likert scale is an incredibly popular tool due to its ability to accurately measure opinions, behaviors, or perceptions. It's one of the most trusted research methods and is frequently used to gather granular feedback about a product or service.

Likert scale empower survey users by allowing them to express various degrees of their opinion through prepopulated answers.

It's a safe and easy way to gain feedback by protecting the participants identity - ensuring positive responses.

Best Practices x Likert Scale:

- It's best to group questions by topic
 - i.e. keep each series question focused on same topic
 - E.g. Dinner → Appetizer → drinks → meal → coat check
- The more specific you are, the higher the value of the question
 - e.g. What does service mean? Is it wait, waiters, or host?
- Be wary of adjectives, ensure that they're easy to understand
 - Start with extremes at either end
 - Define midpoint
 - Use very / slightly when applicable
- Use unipolar scales
 - e.g. none to the maximum; "extremely sick" to "not at all sick"

Other tips:

1. Label scales of each question.
2. Use odd scales to have midpoint.
3. Response options should be equally scaled - know what your words mean
4. Scales should include entire range of responses (e.g. NOT extremely to moderately)
5. Use skip logic when you want extra info from customers with poor experience

Sources:

Advantages of Using Likert Scale Questions

Likert Scale

Words Speak Louder Than Numbers

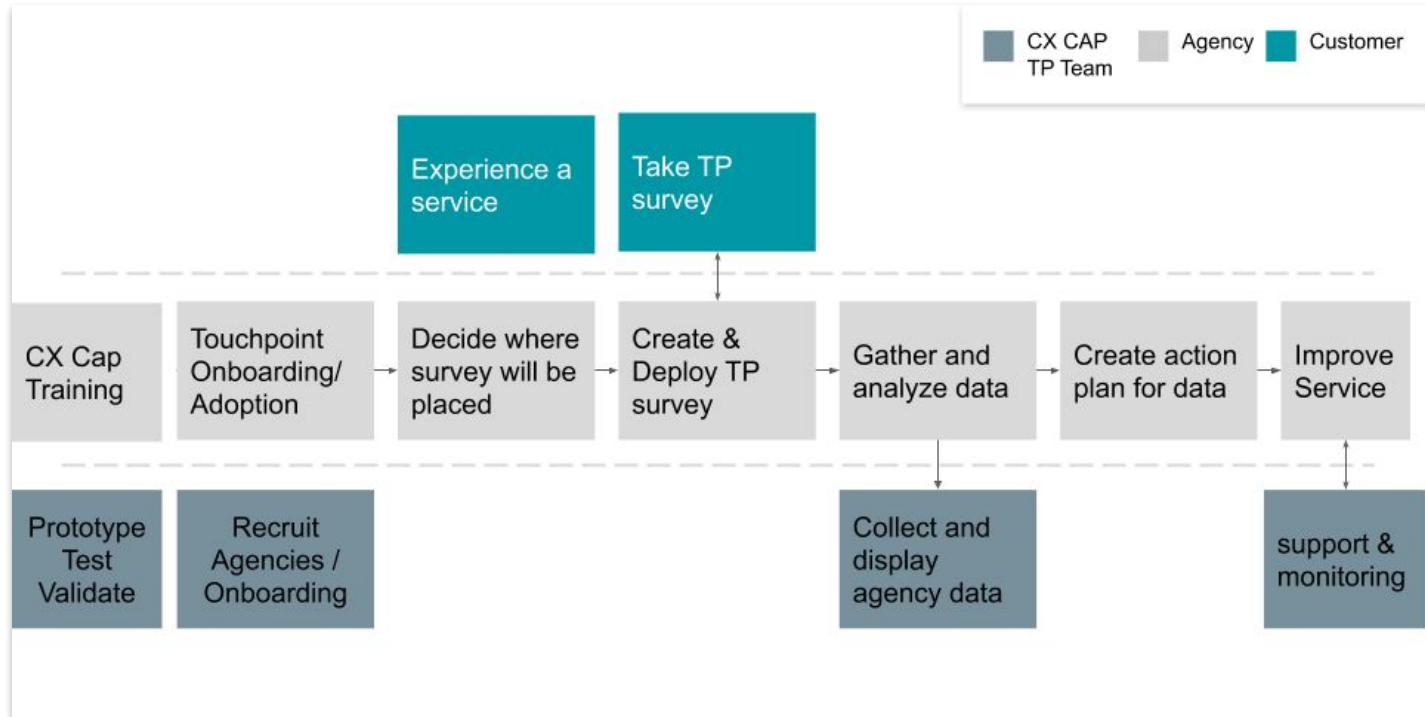
5 ways to improve your skills as a survey creator

Agree to Disagree

Writing Matrix Question / Item-by-item vs Matrix Questions

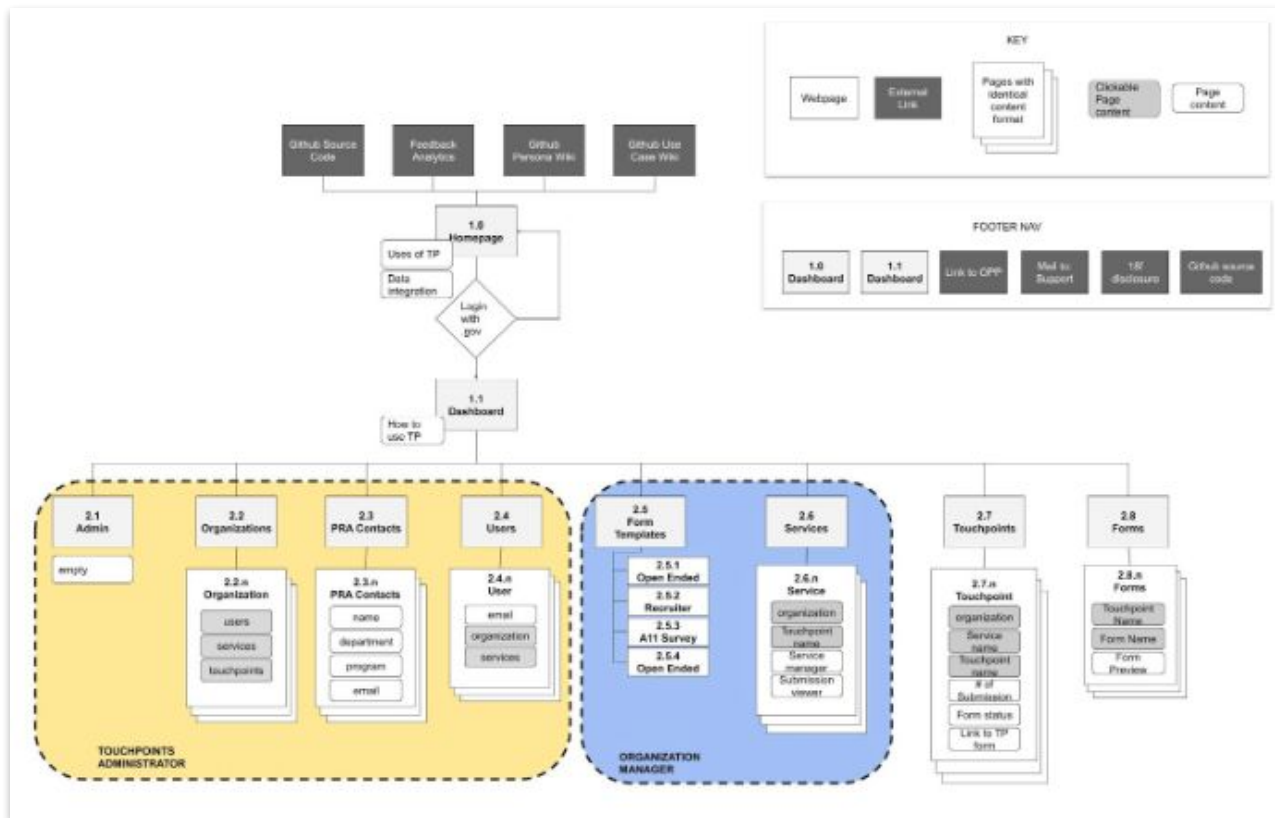
LAYING FOUNDATIONS: 1 - 2 - 3 - 4

INTERACTION MAP



LAYING FOUNDATIONS: 1 - 2 - 3 - 4

CONTENT LAYOUT

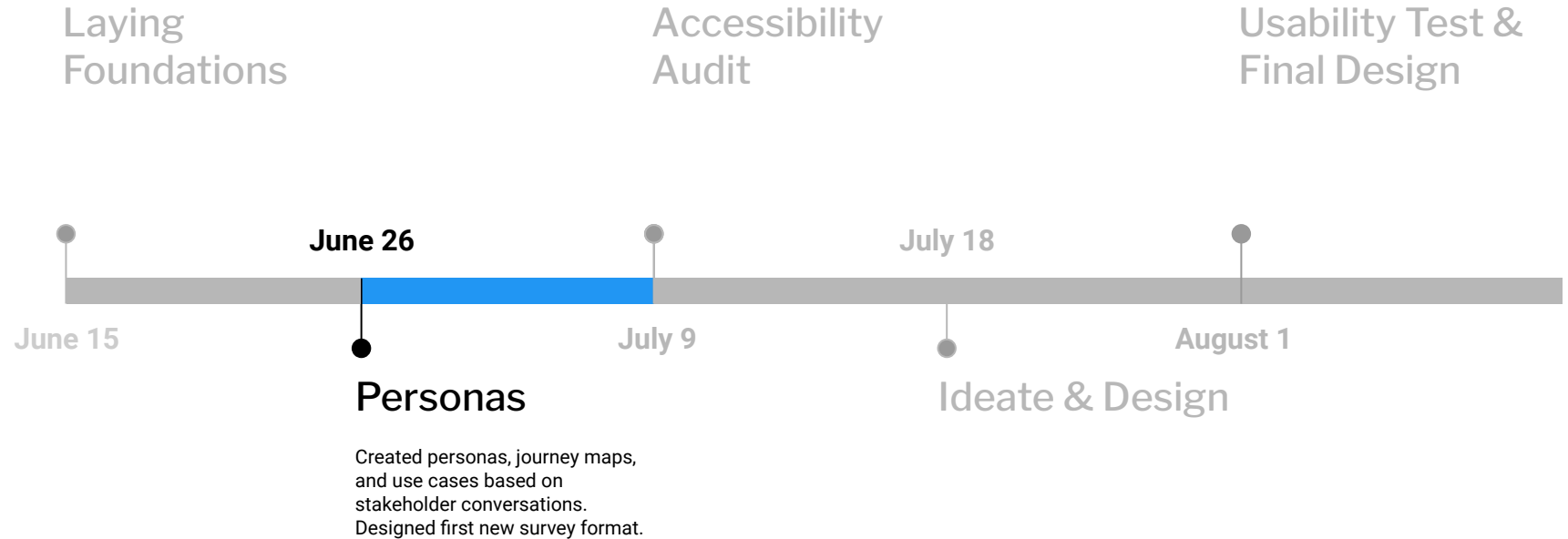


LAYING FOUNDATIONS: 1 - 2 - 3 - 4

COMPETITIVE ANALYSIS

	Touchpoints	Google Forms	Typeform	SurveyMonkey	Survey Gizmo
Overview	Touchpoints is an implementation detail of the A-11 CAP Goal. Touchpoints is a software product of the Feedback Analytics team that offers broader, consultative support around Service Design Analytics.	A part of G-suite, google forms offers quick and easy data gathering with your Gmail address	Younger surveying tool, very lightweight and lacks some features we may like	A simple but powerful survey platform for businesses. Customers can conduct event feedback and sophisticated market research on the Enterprise platform	Online survey tool that supports custom coding for tasks
Cost	free	n/a	starting at \$35/ month	starting b/wn \$25-75/month	starting at \$25/ month
Relevant Features	3 levels of admin access url email link to survey popup modal on website PRA compliant site intercept capabilities	connected to Gsuite view data in survey itself data can be exported to google sheet easy and intuitive	data analysis mobile survey question branching skip logic audio, images, video email distribution	plethora of templates customer segmentation dashboard analytics question branching skip logic *vary between enterprise and CX versions	some templates sixtabbed UI Import Microsoft Word docs
Deployment		Cloud, SaaS, Web	Cloud, SaaS, Web	Cloud, SaaS, Web	Web, JS (maybe)
Support	when needed with TP team (?)	n/a	Business hours	24/7 Live Rep	
Training	onboarding with TP team	n/a	Documentation	Documentation Webinars Live Online Tutorials	
Cons		no custom URLs no offline response collection no site intercept survey no skip logic no data analysis tools security vulnerabilities (maybe)	very lightweight compared to other survey tools	poor value at lower pricing tiers lacks display logic support no site intercept survey	limits in logic minimal support

PERSONAS



Agency user stakeholders

[illegible]



KIERRA JOHNSON
High School Senior

Status
Single

Location
Long Island, NY

Education
High School

Family
Mom, Dad,
5 siblings

I'm really worried about school. I'd love to attend NYU or Yale but I'm afraid I won't be able to afford it.

Biography

Kierra is a rising high school senior. Due to various fiscal troubles, she and her family moved around a lot for the past few years. However, they recently settled in Long Island, NY last year. Now that she's getting ready for college, Kierra is worried about affording school.

Motivation

- Kierra's main motivation is to attend a school that has a strong writing and arts program
- As the eldest of her siblings, Kierra wants to help pave the way for her siblings
- She's aiming to get a scholarship from college but definitely wants to get approved for aid

Goals

- successfully fill out the FAFSA application
- learn how to complete it for future years
- save money on formal education

Frustrations

- worried about the FAFSA application and being able to receive financial aid
- doesn't know how to navigate the language

Emotional Status

Analytical	<div></div>	Creative
Satisfied	<div></div>	Frustrated
Passive	<div></div>	Active
Content	<div></div>	Worried

Technology

Using a desktop apps	<div></div>
Using mobile apps	<div></div>
Social Media	<div></div>
Using the internet	<div></div>
Messaging	<div></div>

last updated dd/mm/yyyy

Public user stakeholders

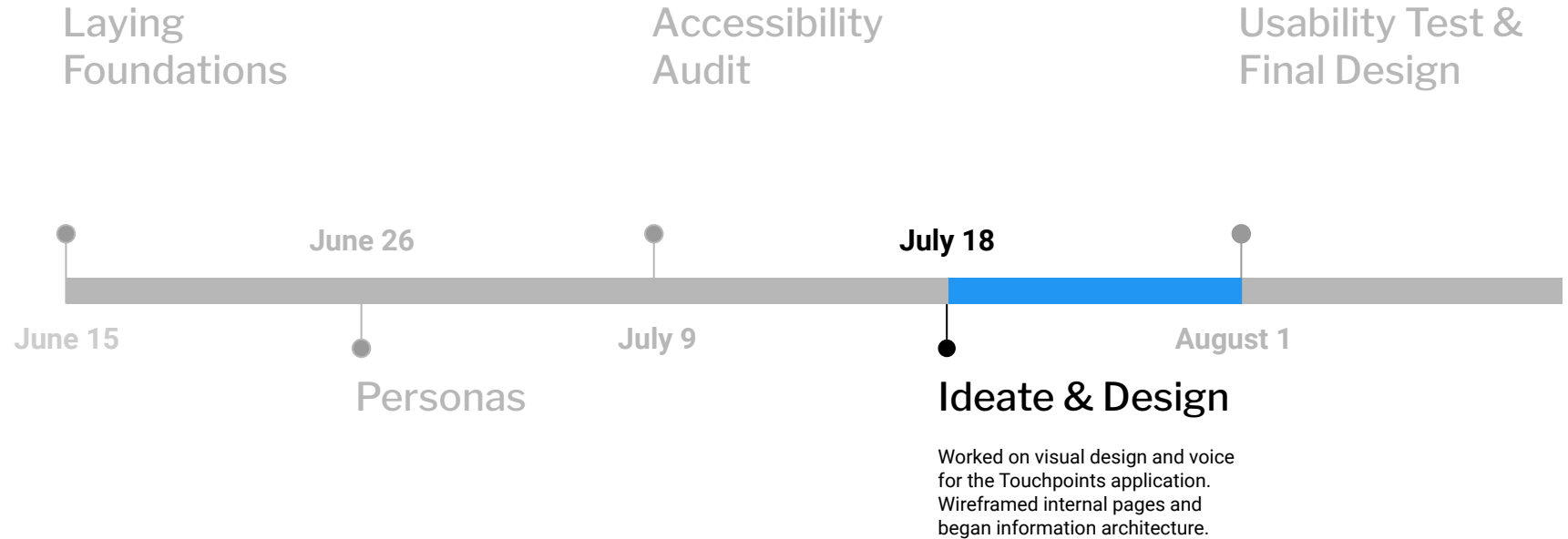
ACCESSIBILITY



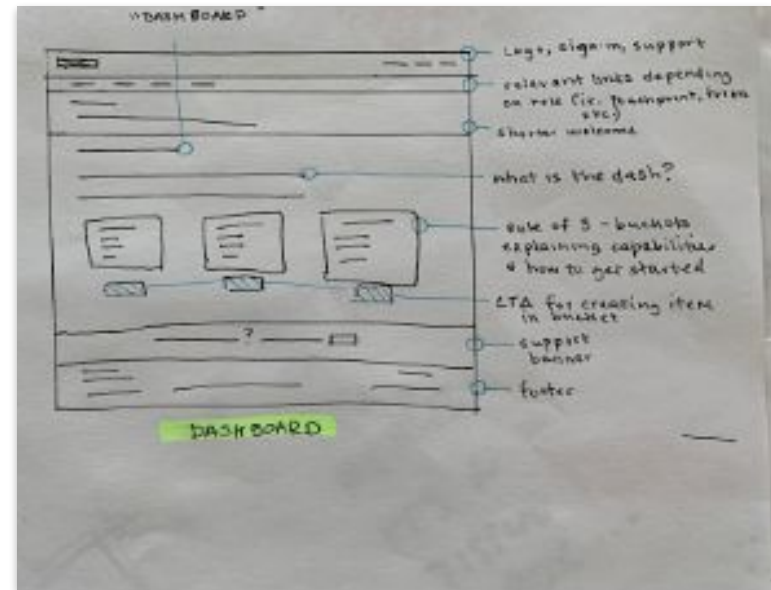
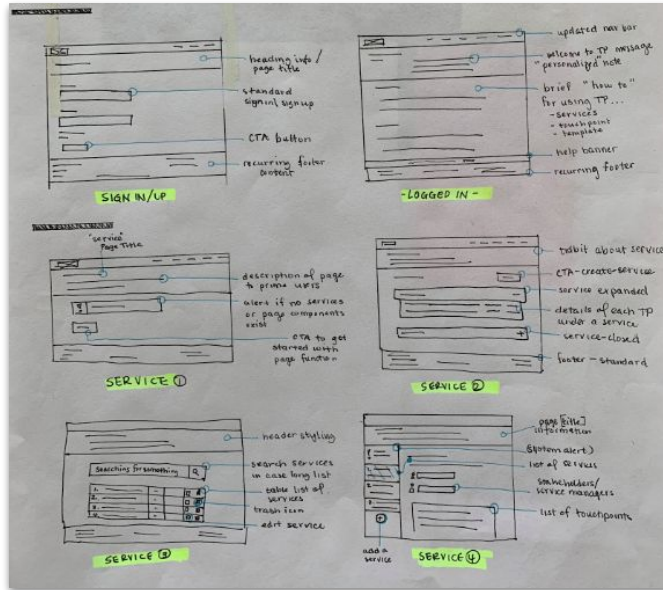
ACCESSIBILITY AUDIT

			KEY	Pass	Fall	In Progress	Not Applicable
Principles (POUR)	Guideline	Status	Criteria	Recommendations			
Perceivable	1.1 Text Alternatives	n/a	all non-text content has text alternative that serves equivalent purpose				
	1.2 Time-based Media	n/a	captions/ transcripts requires for time-based media				
	1.3 Adaptable	x	all info can be perceived by all users; spoken aloud or presented in a simpler visual layout				
	1.4 Distinguishable	x	make default presentation of information as easy to perceive as possible; color, contrast, text attributes				
Operable	2.1 Keyboard Accessible	x	all content accessible by keyboard or other accessible technologies				
	2.2. Enough Time	n/a	users have autonomy over time limits (up to 20 hours)				
	2.3 Seizures	P	web content should not contain more than 3 flashes in a second				
	2.4 Navigable	x	user can navigate, find content, and determine where they are on a page	- use ARIA landmarks - use HTML5 sectioning elements	- web pages have descriptive titles - logical tab order - more than one way to get to a page		
	2.5 Input Modalities	?					
Understandable	3.1 Readable	x	apply plain language guides and specify language in DOM				
	3.2 Predictable	P	labels and content are positioned in ways that are predictable				
	3.3 Input Assistance	n/a	increase likelihood that all errors are noticed by user; help user understand how to correct error	- identify errors inline - provide multiple error cues	- fields are properly labelled using HTML markup or ARIA tags - provide feedback after CTA / submission		
Robust	4.1 Maximize compatibility for use with assistive tech	x					

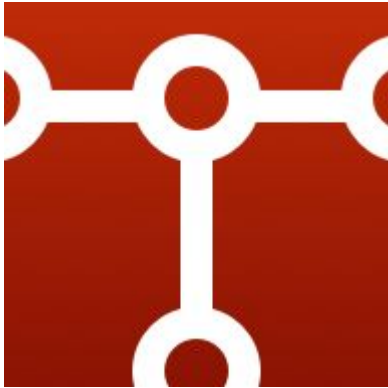
IDEATE AND DESIGN



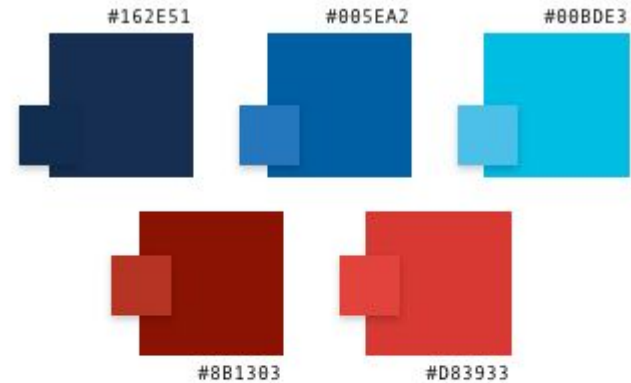
IDEATION PHASE



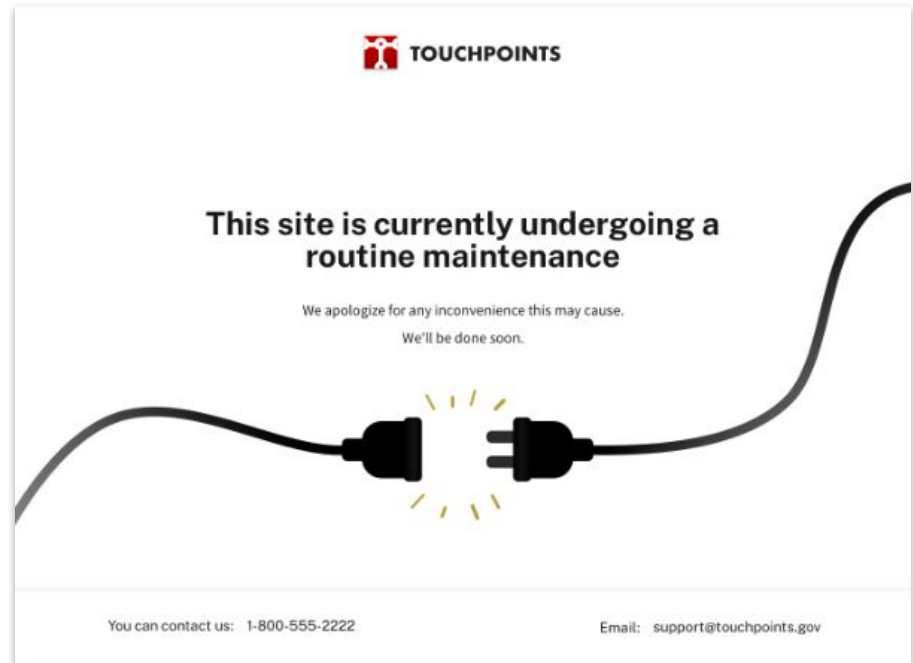
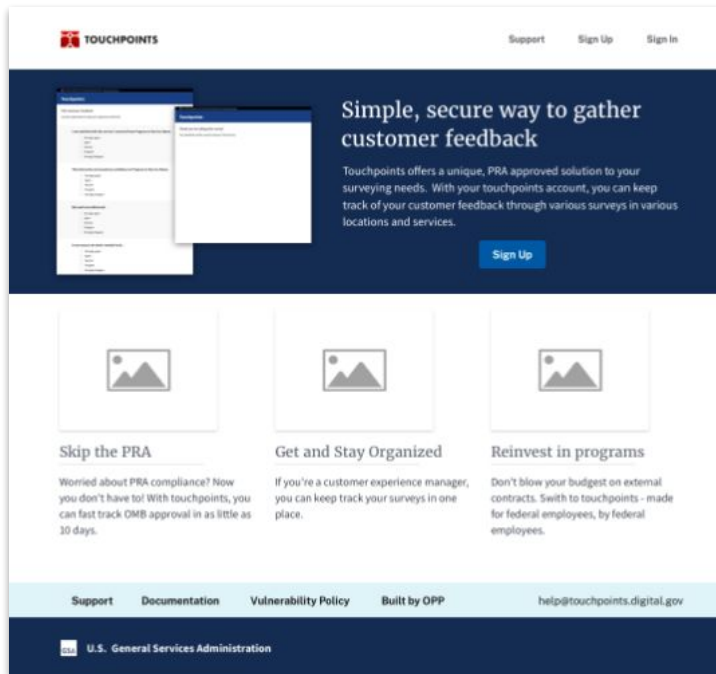
DESIGN PHASE



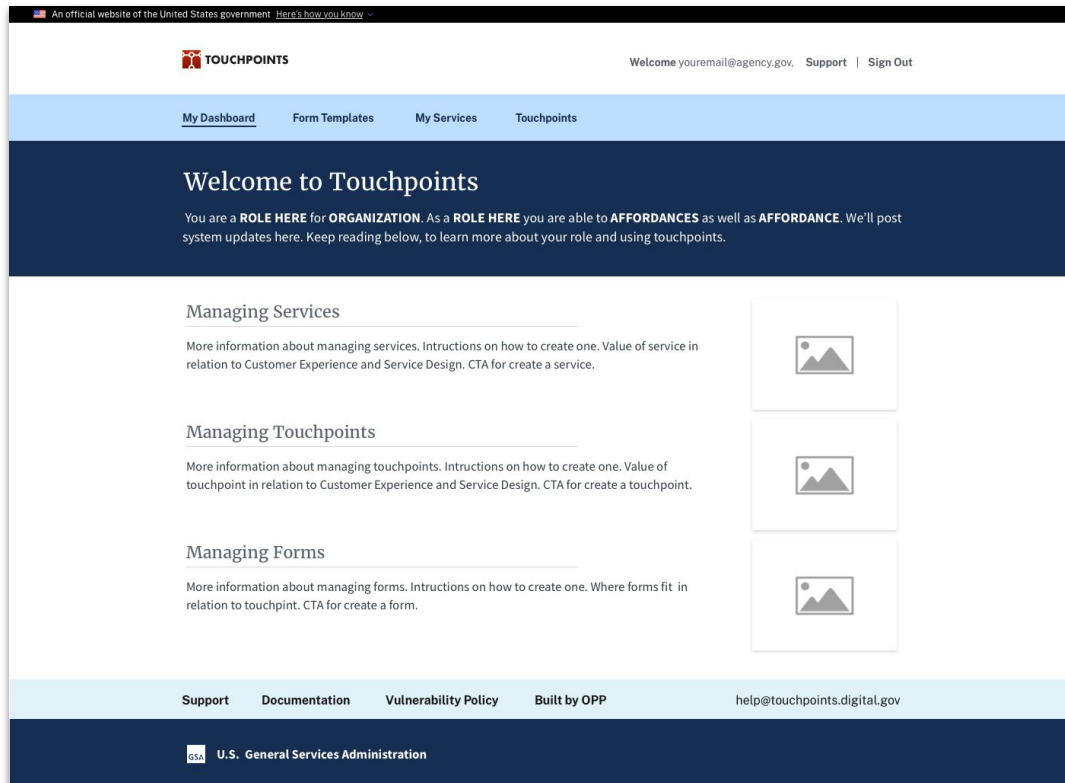
TOUCHPOINTS



DESIGN PHASE



DESIGN PHASE



TEST. VALIDATE. DESIGN.



USER RESEARCH

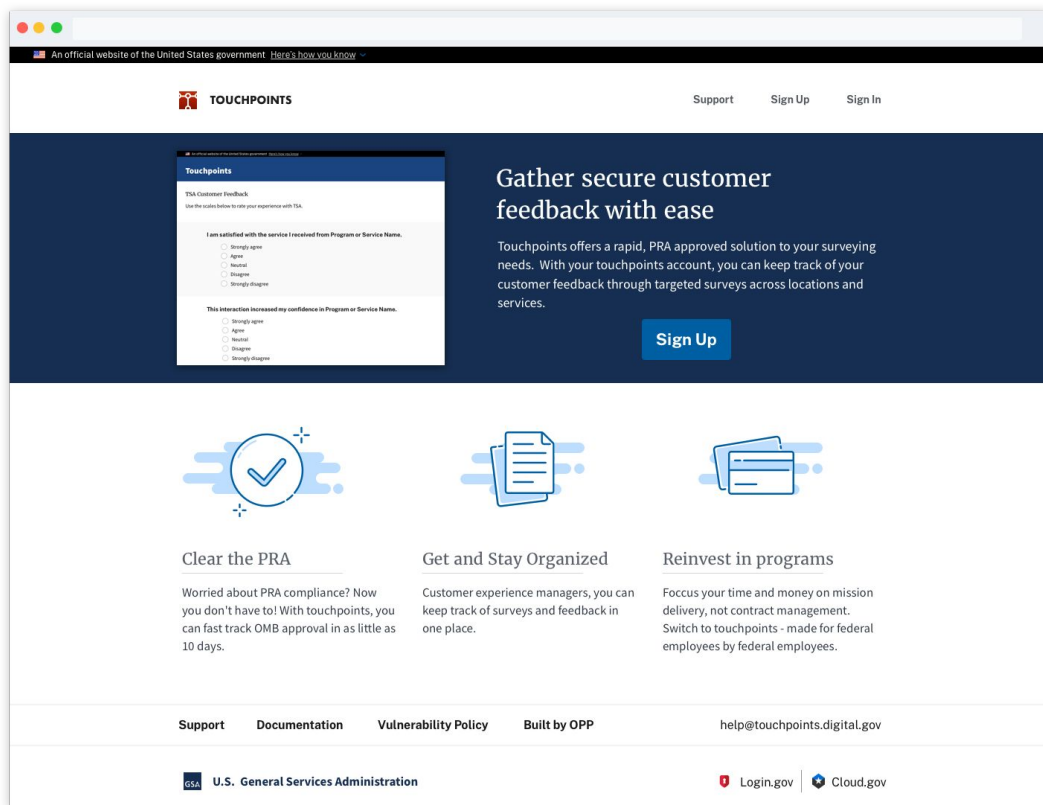
7 user research sessions with federal employees.

Key Takeaways:

- Users were confused about the **purpose of tool**
- Users struggled to **create a survey**
- Surveys were **formatted poorly**; inaccessible



FINAL LANDING PAGE DESIGN



NEXT STEPS

- Continue agile design iteration method
- Include users in feedback sessions
- Keep accessibility and user at forefronts

THANK YOU

I'd like to give a huge thanks to

- The **Office Customer Experience at GSA** for providing endless support
- My mentors **Lauren Peterson, Shane Strassberg, and Michael Boyce**
- The **Feedback Analytics team** for trusting me with Touchpoints
- The **CX CAP Goal team** for welcoming me into the fold
- And, **Coding it Forward** for providing me with this opportunity