**VA.gov CMS research**

# Author research: VAMC Pittsburgh author experience

*VAMC Pittsburgh is the model location of approximately 150 medical centers.*

*This plan covers research we aim to do onsite at VAMC Pittsburgh with authors who currently use or maintain the Teamsite content management system.*

*Related research:* [*VAMC Pittsburgh: veteran patient*](https://docs.google.com/document/d/1TCmbwafuP8dVsmiYPdgl-rTEwXe5BcM8AVqHNBjeBZU/edit#) *with veteran patients and their spouses or caregivers*

## Study goals

While onsite, we will conduct **1:1 contextual inquiry** and **host a workflow and training working session with authors** in order to:

* Define CMS roles. Who currently manages content in the CMS (E.g, SMEs, writers, business stakeholders, editors, designers, translation managers, or another type of author?)
* What kind of expertise do they have in digital content and technology (so that we assess the needs for training and assistance in creating effective digital content)?
* What are the triggers for creating and revising content and what is the process used to do so?
  + How similar or different are the processes across the various user groups and content types?
  + What are the pain points and disruptions?
  + What works well?
  + How can we streamline and standardize?
* What kind of training is expected and how do people prefer to learn?

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## Experiences to be tested

* Pittsburgh.va.gov's Teamsite author environments
* Workflow of a variety of authors who work on pittsburgh.va.gov

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## Behaviors to influence

See *Appendix: Scoring Dimensions of a Strong Author Experience*

## Methodology

**1:1 contextual inquiry** focused on author workflow (conversation guide coming soon) and training

* **Informed consent**: see above
* **Recruiting**: a range of author types will be contacted to participate by Howie Brande with the help of Jeff Barnes and Jane Newman (in progress)
* **Screening:**
  + 1-2 technical authors/users
  + 6-8 non-technical authors
  + 1-2 who use the ID Me workflow [per Jeff]
  + *Break this down further if possible, with an eye on ensuring we speak to all types of authors* (E.g. 3 benefits SMEs, 3 writers, 3 business stakeholders, 3 editors, 3 designers, 2 translation managers, etc)
* [**conversation guide**](#pij8ygbzpunc)
* **Debriefing:** The research team will debrief for 15 minutes after each session using the [debrief guide](#4nvugrllz7tj)
* **Research Artifacts**: Verbatim notes, dimension scoring, debrief notes, diagrams, informed consent forms will be organized and stored on our team's Confluence
* **Analysis**: Key findings will be presented informally. The research will feed directly into development of the content model, author experience design, governance framework, and help desk/training approach

**A working session on author experience and workflow:** we will facilitate the building of a holistic artifact that documents the current state workflows and identifies areas or improvement. Questions that will guide this activity:

* What are the triggers for creating or revising a piece of content?
  + Once trigger is identifies, what is the process for creating or revising a piece of content?
    - Who does what?
    - How do they do it?
    - What are the roadblocks or challenges?
    - What is working well?
    - What would you like to stay the same?
    - What would you like to see work differently?
    - How do roadblocks and challenges affect your ability to be successful and satisfied in your job?
* **Informed consent**: see above
* **Recruiting**: a range of author types will be contacted to participate by Howie Brande with the help of Jeff Barnes and Jane Newman (in progress)
* **Screening:**
  + 1-2 technical authors/users
  + 2-4 Teamsite power users
  + 4-6 non-technical authors, for example:
    - Communications professionals who need to update their sites with the latest brochures from Public Affairs
    - Admin Assistant who needs to update contact info
    - Benefits SME who works in Life Insurance
    - *Break this down further if possible, with an eye on ensuring we speak to all types of authors* (E.g. 3 benefits SMEs, 3 writers, 3 business stakeholders, 3 editors, 3 designers, 2 translation managers, etc)
    - *In later research, we will speak to Teamsite vendors and content designers from SO Company*
* **Research Artifacts**: Workshop notes, documentation of workflow will be stored on Confluence, attached to the study
* **Analysis**: Key findings will be presented informally. The research will feed directly into development of the content model, author experience, governance framework, and help desk/training approach.

## Related Research

* [Facilities locator research, 2016](https://github.com/department-of-veterans-affairs/vets.gov-team/tree/master/Products/Facilities_Locator/Research)
* [Stakeholder interview with Louis Scavnicky, former webmaster for pittsburgh.va.gov](https://va-gov.atlassian.net/wiki/spaces/VAGOV/pages/19365889/11-16-18+Interview+with+Louis+Scavnicky)

# Timeline

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| **When** | **Milestone** | **Who** |
| 1/4 | Ensure field logistics are in order  Book travel | Meghan Casey |
| 1/7 | Finalize stimulus (E.g. workshop materials) and conversation guides | Meghan Casey |
| 1/8-1/10 | Onsite at VAMC Pittsburgh |  |
| 1/11-1/15 | Synthesize research findings. | Meghan Casey |
| 1/16 | Share topline findings to ensure alignment prior to iteration | Meghan Casey |
|  | Design iteration | Meghan Casey |
|  | Share work-in-progress designs and roadmap with internal stakeholders | Meghan Casey |

# Research Materials

[conversation guide: Author experience](#pij8ygbzpunc)

[Debrief Guide](#4nvugrllz7tj)

## Author experience conversation guide: contextual inquiry

### Greeting

Hello, thank you for joining us today!

You have about 45 minutes to spend with us today?

### Informed constent (~2m)

[VA Consent Form](https://github.com/department-of-veterans-affairs/va.gov-team/blob/master/user-research/study-3/VA.Consent.Form.study%203.docx)

### About the study (~3m)

* As I speak to you today, I may sound like I’m asking “why” a lot. That’s because I want to make sure I capture your details correctly.
* Before I ask you a few background questions, I want to remind you that your job is really easy, you just have to be yourself and act as you naturally would.
* I did not design anything you're going to look at today, I’m just collecting feedback.
* As we talk today, please be honest with your positive and negative thoughts.
* Nothing you say will hurt my feelings.
* I will now begin recording the session (Make sure to tap record!)

### Background (~8m)

* What is your role here at VAMC Pittsburgh?
* Do you have a business card? [if not, ask what it should say]
* How long have you been here?
* Who do you work with?
  + Who is your manager and what is their title? What do they do?
  + Who do you work most closely with?
  + Do you depend upon any other person or teams to do your job?
  + Who do you contact for support?
  + Which person is most accountable for the success of content on pittsburgh.va.gov?
* Have you had other roles here?
* How long have you done this type of work?
* Were you trained to use the CMS? If so, tell me about that?
* When was the last time you used the CMS?
* Are there tasks you do regularly in the CMS?
* Are you planning on working on tasks that involve using the CMS today or soon?

Thank you for answering those!

### Interview questions (~40m)

* At any time today, did you assess what kind of work you have in store? If so, how? If not, how do you see what types of CMS work you have waiting for you?
* Earlier you mentioned you last used the CMS [insert what participant said earlier]. Would you re-enact that experience for me now?
  + Think aloud as you go.
  + Start from the very beginning, even if that requires steps completed outside of the CMS (E.g. checking email or a cheat sheet of some kind).
  + Would you tell me when you are done with this task?
  + Was there any urgency to doing this task? Was there a reason you did this task when you did it?
* [if true] Earlier you mentioned you planned on doing some work in the CMS today/soon.
  + What CMS work are you planning on doing today? A list of tasks or jobs would be great to hear or see.
  + Thank you for sharing that. Which of these is the most involved or complicated task?
  + Thank you for sharing that. Can we sit here with you while you do [the most complicated task due today, use their words from the previous question] to see and hear how you get the job done?
    - Think aloud as you go.
    - Start from the very beginning, even if that requires a step outside of the CMS (E.g. checking email or a cheat sheet of some kind).
    - How do you know when you are done?
    - About how long did it take you to do that?
* When it comes to your work, which tasks are easiest to accomplish in the CMS?
* On the flipside, which tasks are the most to difficult accomplish in the CMS?
* Can you tell us a little bit about what kind of training you received to manage content in the CMS?
  + Did the training cover what you need to know to do your work in the CMS?
  + What could have been better about the training?
* If you encounter a problem using the CMS -- for example if it’s not working properly or you have to do something you’ve never had to do before -- what do you do?

### Wrap up questions

* Why do people use the CMS here?
* What would you like to stay the same about your current experience with the CMS?
* What would you like to see work differently?
* Who else should we speak to for this research? Not a specific person, a type of person.

### Exit

* Well [participant name] that does it for us. Your input is very important to us and I want to thank you.
* Optional: May we contact you again for future research in the next few weeks? If yes, can we contact you directly?

## Debrief Guide: Post Research Sessions

Debriefing Mindset: Instigate and push the team to widen the field of association and encourage them to experience the world in novel or original ways. Provoke ideation and push the team in extreme directions, listening for wherever a person says, “it’s like...” or “it’s almost like...” and tease out insight from there.

* What did participants do? List a few activities that relate to what they were trying to accomplish.
* How did participants characterize what they did? Use their words.
* What did you see going on?
* What surprised you?
* What did you learn in that session?

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## Appendix: Scoring Dimensions of a Strong Author Experience

## Organizational maturity

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| Anyone can create/manage content |  | Writing is a skill that requires the right expertise and tools |

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| More content will solve the content problem |  | Realistic expectations have been set about what people can expect from the org's communication channels |

## Tension between developer needs and author needs

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| The CMS was designed for storing and manipulating content |  | The CMS is flexible enough to manipulate content tied to tasks and needs of the author |

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| Interface enforces info/data model on authors |  | Interface is a translation layer between the storage model and author experience |

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| The CMS reduces technical and performance risks |  | The CMS reduces content risk |

## Process challenges

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| Computer processing was the focus |  | It is clear that author actions, processes, and workflows were the focus |

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| Microcopy and terminology was written to serve information management |  | Microcopy and terminology is consistent and shows a strategy that enables successful author experience |

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## Conceptual challenges

"Content management often requires authors to add information that they understand in principle, but have no meaningful name for. Maybe they can come up with a name; maybe not. But it is unlikely such a term will be meaningful the next day."

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| Terminology is based on function and does not prioritize mapping to the author tasks |  | Consistent terminology is used throughout the system so when an author encounters a new arrangement, the layout and grouping make intuitive sense |

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| The interface and flow enforces the info/data model on authors |  | Content attributes are organized so authors can decipher the basic information (reference, file, alt text, caption), the rendering options, and references. The system was designed to help authors create, represent, and maintain associations between |

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| Content is coupled with function (an association that does not come from any natural human behavior, E.g. prompting an author to add a link by requesting <a href="…">) |  | Associations between content is created by reference metadata – attributes that establish subject affinity |

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| Systems takes for granted that labels and microcopy will be understood by all |  | Help content is available in context (E.g. to explain labels) |