MCT Omnichannel Experience: Phase III Chatbot User Testing Facilitation Guide

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# Overview

### Key Objectives

1. Validate Veteran reactions to chatbot error handling when understanding user intent.
2. Observe Veteran reactions and gather their impressions of a chatbot-to-live agent handoff within the same conversation.
3. Test Veteran perceptions of screener methods when escalating from chatbot-to-live agent.

### Questions by Topics

|  |  |
| --- | --- |
| **High Priority** | |
| ***Topic*** | ***Supporting Questions*** |
| Error handling | 1. How do users react after being presented with limited options to help guide them towards a resolution? 2. Does this level of error handling and clarification of intent help users in achieving their goals? |
| Chatbot-to-live agent handoff / escalation | 1. At which points in this experience did users encounter friction or become confused? 2. For what amount of time did users project they would be willing to wait to be connected with a live agent in this experience? 3. What negative aspects of the live agent experience might be addressed with either design or content? What aspects might be helpful to include as recommendations for contact centers to incorporate into their training? |
| **Medium Priority** | |
| ***Topic*** | ***Supporting Question*** |
| Screener | 1. Do users prefer being asked if they want to provide additional information if it helps expediate their ability to get to a resolution? |
| User utterances | 1. How do users ask the questions in the given scenarios? What does this mean for mapping utterances to intent in future chatbot design and content creation? |
| **Low Priority** |  |
| ***Topic*** | ***Supporting Questions*** |
| Post-chat survey experience | 1. Do users click on a hyperlinked post-chat survey? |

### Testing Method

The objective of this phase is to expand on research findings from the usability tests conducted during phase II, specifically related to chatbot error handling and escalation to a live chat experience. Below are a few testing methods for collecting qualitative data on (1) chatbot design and (2) the desirability of certain functions.

### Research Activities

#### Level of Fidelity

* **Low, Content –** The focus of the prototype is less visual and more content-oriented; words and symbols are accurate, but the final look and feel is not represented.
* **Medium, Visual –** The focus of the prototype is on content, as well as look and feel; however, buttons and interactions are not built out.
* **High, Interaction –** The focus on the prototype is comprehensive; content, visual look and feel, and all interactions are developed but the prototype is not live.

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| Activity / Fidelity | Definition - *What is this method?* | Rationale – *Why did we choose this method?* | Benefit | Limitations |
| 1:1 Interviews  *High, Content* | A series of questions will be asked of the interviewee to understand desirability, participant sentiment on design features, and usability. | Individual interviews allow researchers to probe into the user’s past experiences and identify significant expectations or concerns for their future service interactions. | **Simplicity:**  Facilitator can ask direct  questions to the user.  **Natural flow of conversation:**  The conversation is structured, but flexible and may uncover unique stories/ unexpected insights. | **Withholding Information:**  Users may fear hurting the teams’ feelings or feel embarrassed  and withhold complete judgment and honesty.  **User perception:**  What the user says may not always match their real-life interactions. |
| Digital Prototypes  *High, Interaction* | Digital prototypes will simulate a user story scenario so the team can make observations on how the user interacts intentionally and unintentionally within a chat experience. | Digital prototypes help inform the usability of certain chatbot features by simulating an interactive experience. The intent is to immerse the user in a realistic scenario and give the design and development team a chance to pivot before development begins. | **Genuine observations:**  The facilitator can observe the habits and behaviors that a user may not realize themselves.  **Realistic Simulation:**  Closely simulates what would occur within a chatbot and chat experience.  **Quick/low effort:**  Designers can quickly mockup a chat or chatbot environment without the complications of coding and development. | **Platform limitations:**  The HCD team is confined to Microsoft Dynamiics365 capabilities.  **Technical constraints:**  The HCD team is reliant on the user’s access to the internet and their ability to navigate remote conferencing platforms such as Zoom. |

# Facilitation Guide

## Introduction

***\*Note to Facilitator to turn on Camera.***

***Introduction Script.***

Thank you for taking the time to give us your feedback. My name is [*insert name*], and I will be facilitating today’s testing session. [*Optional: Introduce government observer, notetaker, and others present.*]

We are working with VA to improve the VA contact center experience. Our goal is to gather feedback on a VA.gov chatbot and understand how it might help Veterans, Caregivers, and their beneficiaries in accomplishing their goals.

With your permission, we are going to document this session using written notes, screenshots, audio, and/or video recording. We will only use the information you share with us for research and analysis, and we will not share it with anyone outside of our project team at VA. Do you understand these guidelines and consent to this interview being documented via written notes, screenshots, audio and/or video recording?

[ ] Yes, consent provided

[ ] No, do not record

Great, thank you. Before I go over the agenda for today’s session, I have two other things to note:

1. **[Observers]** My colleague will be observing and taking notes on the call. This helps me to stay involved and focus on our conversation. Is that ok with you?
2. **[Stopping & Aggregation]** I also wanted to let you know that your participation is entirely voluntary, and we can stop at any time. You are also welcomed to decline or skip any question. In our notes, we will remove any personally identifying information such as your name or benefit eligibility status, and combine them with other participants’ information, so no feedback will be directly tied to you. Is that alright?

***\* Note to Facilitator to notify the participant once the recording has started.***

### Agenda

To give a quick **overview** of what we’ll run through, here’s our agenda for today:

This session is set to be no more than one hour. In a moment I’m going to ask you to share your screen while we are testing the product and turn on your camera if you feel comfortable doing so. Let me know if you need help sharing your screen.

[*For users on mobile only, note that there are additional confirmation modals that the user may have to go through. Also, they may have to change access permissions in their Settings if they do not automatically allow Zoom to share their screen.*]

We will ask you to use a chatbot using a couple of tasks that we will share in just a moment. It’s important to remember that we are not testing you, we are testing this chatbot. You can’t do anything wrong here, and you cannot break this chatbot. ***\*\*Note for Facilitator\*\* (If needed) Provide additional context that the user is just testing the chatbot and not the website.***   
  
As you go through today’s session, please think out loud as much as possible. Describe what you are looking at, what you’re trying to do, and what you’re thinking. We especially want to know if there’s anything you like or don’t like, or if there’s anything you find confusing. We want your complete honesty.  
  
In order for this simulation to feel as natural as possible, I will not be providing assistance, but may ask the occasional follow up question to understand your thoughts. Please let me know if you get frustrated and would like to stop or skip ahead to the next question. Following each task, I will ask a few follow up questions before moving on to the next.

***\*\*Note for facilitator and note taker\*\* These quick chats are specific to instances that are outside of the planned scenario. This is a way for us to capture the engagements in which the user might “break the bot”.***

After we complete all the tasks, I'll ask you about your overall impressions of the experience and take note of any general comments you have. I can’t stress enough your honest feedback will help us make a better chatbot. Please don’t hold back. Even small or nitpicky things are helpful. You will not hurt our feelings if you are brutally honest!

Do you have any questions at this point?

## Background Questions

Before we begin, I have just a few background questions. Please note you have the option to skip or decline any of these questions.

### VA Engagement Questions

1. In the last month, how often have you used VA.gov to find information or learn about VA programs?
   1. None
   2. 1-2 times
   3. 3-5 times
   4. More than 5 times
2. Would you say that’s typical of the amount of time you spend on VA.gov in an average month?
   1. Yes
   2. No
3. Do you have an online account on VA.gov?
   1. Yes
   2. No
4. [If yes] in the last 30 days, how often have you signed into your online account?
   1. None
   2. 1-2 times
   3. 3-5 times
   4. More than 5 times
5. Would you say that’s typical of the number of times you use your VA online account in an average month?
   1. Yes
   2. No

## Wave L

Thank you for your answers so far. Now we can move on to the testing activity. To get started, please open your web browser, Chrome seems to work best, and share your screen. Then I’ll send over the link to the instructions in the chat window.

**Disclaimer- Do NOT Skip**

As a reminder, this is a test chatbot, and none of your information will be saved or sent to VA. None of the questions will ask for your name or identifying information.

**However, it is VERY important that you do not type and send ANY personal information through the chat. Please do not type in your Social Security number, email, home address, last name, or any other personally identifiable information.**

Any questions, comments, or concerns so far? Great! Let’s begin…

**Scenario 1:** ‌You are a user that is looking to find out how long it will take for retroactive payments will post for a claim that you have submitted.

Step 1. Please have the user read the scenario **1** on the right out loud. When they are ready instruct them to type “Hi” in the chat box.

* Note: if there is an issue, have the user either refresh the page or type “Hi” again.

|  |  |  |  |
| --- | --- | --- | --- |
| Chatbot L – 2B | | | |
| **Testing Feature** | **Pertinent Notes – Utterances and Actions** | **Solution — desired user action** | |
| **Disclaimer: Tool Tips & Instructional Information**  “This tool can answer general questions about Claims, Benefits, and can also provide information on how to reach a Live Agent depending on the request.  Please type your question to get started.”  **Testing Category:** Greeting | *Note user utterances and actions. Did the user read through the disclaimer/instructions?*  Did the user gravitate towards reaching a live agent? If so, ask why they chose to escalate. | N/A | |
|  |
|  |
| **Interaction:**  “It appears that you’re inquiring about your VA claims. I can assist you with claim reimbursements, dispute a claim decision, or checking claim status.  **Testing Category:**  Intent Recognition | *[Observe] How does the user react to how the chatbot communicates comprehension of the user’s intent?* | N/A | |
| **Interaction: “**Select the option that you would like to explore.”  **Testing Category:** Guided Buttons | *[Observe] How does the user interact with the selections provided?* | The user clicks the button most associated with the scenario. | |
| *[Observe]How does the user examine the possible options that are provided to them? Did they seem confused by the options?* |
| **Graceful Failure**  *“We seem to be experiencing technical difficulties. Let me transfer you to an agent that can help assist you.”*  **Testing Category:** Graceful failure | [*observe] How does the user react to the bot’s response to a technical error?*  [Insert Notes] | N/A | |
| ***[Possibility] Error Handling***  *“*You are second in the queue. An agent will be with you soon.”  **Testing Category:**  Escalation | *[Observe] Did the user comment on the length of how long they would have to wait to speak to an agent?* | N/A | |
| **Live Agent:**  **Testing Category:**  Live Engagement & Agent Clairvoyance | *[Observe] how did the user response to the agent being aware of their inquiry?*  *How did the user act to the solution provided by the agent?*  [Insert Notes] | N/A | |
| **Post Chat Survey**  **"***Would you be willing to take a quick survey on how we did?”*  **Testing Category:** Post-Chat Survey | [Observe] *Does the user participate in the PCS?*  *Note user utterances, hesitation, and/or actions to post chat survey.* | N/A | |
| **Agent Chat Closing Message**  **Testing Category:**  Non-Personified Bot Tone | *How does the user react to the tone of the closing message?*  **[Insert Notes]** | N/A | |
| **User Evaluation of Chatbot**  [Completed with user, Likert 1-5] | **Quality -** I felt that this tool was able to help me accomplish my task that was asked of me today. | |  |
| **Efficiency/Speed -** I felt that this tool was quick in finding me a resolution. | |  |
| **Simplicity/Ease -** I felt the chat was simple and easy to understand/figure out. | |  |
| **Helpfulness –** I felt that this tool would be helpful to Veterans like myself. | |  |
| **Satisfaction -** I felt satisfied with the overall functionality of this chat prototype. | |  |
| **Trust –** I felt confident and secure when talking the chatbot and live agent. | |  |

### Wave L – 2B: Follow-Up Questions

1. How did you feel about your interaction with this chat?
2. Is there anything that you would like to tell us about why you chose the ratings above?
3. Was there anything that frustrated you?
4. Was there anything you were pleasantly surprised about?
5. Why did you decide to or against participating in a post chat survey?

**Scenario 2:** ‌You are a user that is looking for more information on how to apply for VA health care benefits and have already escalated to a live agent.

Step 3. Have the user read scenario **2** out loud. When they are ready, instruct them to type “Test 2” in the chat box.

* Note: if there is an issue, have the user either refresh the page or type “Test 2” again.

|  |  |  |  |
| --- | --- | --- | --- |
| Chatbot L - 1B | | | |
| **Testing Feature** | **Pertinent Notes – Utterances and Actions** | **Solution — desired user action** | |
| **Screener:**  Transferring you to a live agent.  Before we transfer you, can you tell us the reason for your visit today?  **Testing Category:**  Cold Screener | *[Observe] how did the user react to having to provide context?* | N/A | |
| **Handoff:** *"The wait time to speak to an agent is X mins. Please do not close this window and an agent will be with you soon*  **Testing Category:** Wait Time & Instructions | *[Observe] what was the user’s reaction to being provided an estimated time that they would have to wait for an agent?*  *[Observe] Did the users mention anything about the instructions?* | N/A | |
| **Handoff:**  Wait time  **Testing Category:**  Wait time | *[observe] was there a length of time that the users felt uncomfortable?* | N/A | |
|  |
|  |
|  |
| **Agent:**  **Testing Category:**  Live Engagement & Agent Clairvoyance | [Observe] how did the user response to the agent being aware of their inquiry?  How did the user act to the solution provided by the agent? | N/A | |
| **Post Chat Survey:**  **"***Would you be willing to take a quick survey on how we did?”*  **Testing Category:** Post-Chat Survey | [Observe] *Does the user participate in the PCS?*  *Note user utterances, hesitation, and/or actions to post chat survey.* | N/A | |
| **Agent Closing Message:**    **Testing Category:**  Closing Message | [Observe] *How does the user react to the tone of the closing message?*  **[Insert Notes]** | N/A | |
| **User Evaluation of Chatbot**  [Completed with user, Likert 1-5] | **Quality -** I felt that this tool was able to help me accomplish my task that was asked of me today. | |  |
| **Efficiency/Speed -** I felt that this tool was quick in finding me a resolution. | |  |
| **Simplicity/Ease -** I felt the chat was simple and easy to understand/figure out. | |  |
| **Helpfulness –** I felt that this tool would be helpful to Veterans like myself. | |  |
| **Satisfaction -** I felt satisfied with the overall functionality of this chat prototype. | |  |
| **Trust –** I felt confident and secure when talking the chatbot and live agent. | |  |

### Wave L – 1B: Follow-Up Questions

1. How did you feel about your interaction with this chat?
2. Is there anything in particular you would like to tell us about your ratings above?
3. Is there anything that frustrated you?
4. Was there anything you were pleasantly surprised about?
5. Why did you decide to or against participating in a post chat survey?
6. When asked about your experience in the post chat survey, what part of the experience would you be rating?

## Wave M

Thank you for your answers so far. Now we can move on to the testing activity. To get started, please open your web browser, Chrome seems to work best, and share your screen. Then I’ll send over the link to the instructions in the chat window.

**Disclaimer- Do NOT Skip**

As a reminder, this is a test chatbot, and none of your information will be saved or sent to VA. None of the questions will ask for your name or identifying information.

**However, it is VERY important that you do not type and send ANY personal information through the chat. Please do not type in your Social Security number, email, home address, last name, or any other personally identifiable information.**

Any questions, comments, or concerns so far? Great! Let’s begin…

**Scenario M - 1A:** As a VA.com user that has not had the experience of filing for benefits, you are looking for a resource to help you through the application process to secure health care benefits.

* Direct the user to the scenario 1A on the left to help orient them to the scenario. When they are ready instruct them to type “Test” in the type your message box.
* Note: if there is an issue, have the user either refresh the page or type “Test” again.

|  |  |  |  |
| --- | --- | --- | --- |
| Chatbot M - 1A | | | |
| **Testing Feature** | **Pertinent Notes – Utterances and Actions** | **Solution — desired user action** | |
| **Disclaimer: Tool Tips & Instructional Information**  “This tool can answer general questions about Claims, Benefits, and can also provide information on how to reach a Live Agent depending on the request.  Please type your question to get started.”  **Testing Category:** Greeting | *Note user utterances and actions. Did the user read through the disclaimer/instructions?*  Did the user gravitate towards reaching a live agent? If so, ask why they chose to escalate. | **N/A** | |
| **Interaction:**  “I see you're talking about health benefits.I can help you Claims, eligibly, and surfacing necessary forms.”  **Testing Category:**  Intent Recognition | *[Observe] How does the user react to how the chatbot communicates comprehension of the user’s intent?* | N/A | |
| **Interaction:**  **“**Please select an option you would like to explore.”  **Testing Category:**  Guided Buttons | *[Observe] How does the user interact with the selections provided?*  *[Observe]How does the user examine the possible options that are provided to them? Did they seem confused by the options?* | The user clicks the button most associated with the scenario. | |
| **Graceful Failure**  "It looks like you're looking for help on <selection >. Unfortunately, I don't have the ability to help with that. I will transfer you to a live agent who is better equip to help, thank you."  **Testing Category:**  Graceful failure | [*observe] How does the user react to the bot’s response to a technical error?*  [Insert Notes] | N/A | |
| ***[Possibility] Error Handling:***  "I am now transferring you to a live agent. You are second in the queue. Please do not close this window and an agent will be with you shortly."  **Testing Category:**  Escalation | *[Observe] Did the user comment on the length of how long they would have to wait to speak to an agent?* | N/A | |
| **Live Agent:**  **Testing Category:**  Live Engagement & Agent Clairvoyance | *[Observe] how did the user response to the agent being aware of their inquiry?*  *How did the user act to the solution provided by the agent?*  [Insert Notes] | N/A | |
| **Post Chat Survey:**  **"***Would you be willing to take a quick survey on how we did?”*  **Testing Category:**  **Post-Chat Survey** | [Observe] *Does the user participate in the PCS?*  *Note user utterances, hesitation, and/or actions to post chat survey.* | N/A | |
| **Agent Chat Closing Message**  **Testing Category:**  **Non-Personified Bot Tone** | *How does the user react to the tone of the closing message?*  **[Insert Notes]** | N/A | |
| **User Evaluation of Chatbot**  [Completed with user, Likert 1-5] | **Quality -** I felt that the chatbot was able to help me accomplish my task. | |  |
| **Efficiency/Speed -** I felt the chatbot was quick in finding me a resolution. | |  |
| **Simplicity/Ease -** I felt the chatbot was simple and easy to understand/figure out. | |  |
| **Helpfulness –** I felt the chatbot was helpful. | |  |
| **Satisfaction -** I felt satisfied with the overall functionality of the chatbot. | |  |
| **Trust –** I felt confident and secure when talking the chatbot. | |  |
| **Confidence –** I feel confident that a chatbot will help Veterans like myself when interacting with VA. | |  |

### Wave M – 1A: Follow-Up Questions

1. How did you feel about your interaction with this chat?
2. Is there anything in particular you would like to tell us about your ratings above?
3. Is there anything that frustrated you?
4. Was there anything you were pleasantly surprised about?
5. Why did you decide to or against participating in a post chat survey?

**Scenario 2A:** You have recently filed a successful claim to VA and would like to know when your retroactive payments will be made available. As a user that is familiar with VA.gov, you have exhausted your search and are seeking immediate help.

* Have the user read scenario 2 out loud.
* When they are ready, instruct them to type “Hi” in the type your message box.
  + Note: if there is an issue, have the user either refresh the page or type “Hi” again.

|  |  |  |  |
| --- | --- | --- | --- |
| Chatbot M - 2A | | | |
| **Testing Feature** | **Pertinent Notes – Utterances and Actions** | **Solution — desired user action** | |
| **Screener:**  "I can transfer you to a live agent. Beforehand, please tell me the reason for your visit."  **Testing Category:**  Warm Screener | *[Observe] How did the user react to having to provide context?* | N/A | |
| **Screener:**  "You are now being transferred to a live agent. While you wait, please answer few questions to gather some background information on your inquiry. "  **Testing Category:**  Warm Screener | *[Observe] How does the user react to being asked to fill out screener questions?*  *Note user utterances and actions.* | N/A | |
| **Handoff:** "The wait time to speak to an agent is X mins. An agent will be with you soon.”  **Testing Category:**  Wait Time & Instructions | *[Observe] what was the user’s reaction to being provided an estimated time that they would have to wait for an agent?* | N/A | |
| **Handoff:**  Wait time  **Testing Category:**  Wait time | *[Observe] was there a length of time that the users felt uncomfortable?* | N/A | |
| **Agent:**  **Testing Category:**  Live Engagement & Agent Clairvoyance | [Observe] how did the user response to the agent being aware of their inquiry?  How did the user act to the solution provided by the agent? | N/A | |
| **Post Chat Survey:**  **"***Would you be willing to take a quick survey on how we did?”*  **Testing Category:** Post-Chat Survey | [Observe] *Does the user participate in the PCS?*  *Note user utterances, hesitation, and/or actions to post chat survey.* | N/A | |
| **Agent Closing Message:**    **Testing Category:**  Closing Message | [Observe] *How does the user react to the tone of the closing message?*  **[Insert Notes]** | N/A | |
| **User Evaluation of Chatbot**  [Completed with user, Likert 1-5] | **Quality -** I felt that the chatbot was able to help me accomplish my task. | |  |
| **Efficiency/Speed -** I felt the chatbot was quick in finding me a resolution. | |  |
| **Simplicity/Ease -** I felt the chatbot was simple and easy to understand/figure out. | |  |
| **Helpfulness –** I felt the chatbot was helpful. | |  |
| **Satisfaction -** I felt satisfied with the overall functionality of the chatbot. | |  |
| **Trust –** I felt confident and secure when talking the chatbot. | |  |
| **Confidence –** I feel confident that a chatbot will help Veterans like myself when interacting with VA. | |  |

### Wave M – 2A: Follow-Up Questions

1. How did you feel about your interaction with this chatbot?
2. Is there anything that you would like to tell us about why you chose the ratings above?
3. Was there anything that frustrated you?
4. Was there anything you were pleasantly surprised about?
5. Why did you decide to or against participating in a post chat survey?
6. When asked about your experience in the post chat survey, what part of the experience would you be rating?

## User Preference Feedback Questions

That was the last chat simulation, thank you for your feedback so far. We are almost done! Before we close out, I want to ask just a few questions on specific areas we are trying to get your preferences and feedback on.

Are you okay to continue? Great!

### Warm vs. Cold Screener Handoff

|  |  |
| --- | --- |
| **Warm vs. Cold Screener** | **Selection (place X)** |
| Group L | |
| On the last prototype, it opened up with transferring you to a live agent and wanting to know more about the reason for your visit. Tell me what were you thinking in that moment?  How did you feel about having to be required to give additional information? |  |
| Group M | |
| On the last prototype, it opened up with transferring you to a live agent and asked if you wanted to provide more information for the agent. Tell me what were you thinking in that moment?  Tell me why you thought it was or was not necessary for the chatbot to ask if you wanted to provide additional information? |  |

### Queue Position vs. Wait Time

1. I want you to think back on the prototypes that we tested today, what difference if any was there in how they transferred you to a live agent?
2. Is there one that you preferred more? Why?

|  |  |
| --- | --- |
| **Queue Response** | **Selection (place X)** |
| Group L | |
| *“*You are second in the queue. An agent will be with you soon.”  Vs  *"The wait time to speak to an agent is X mins. Please do not close this window and an agent will be with you soon”* |  |
|  |
| Group M | |
| *"The wait time to speak to an agent is X mins. Please do not close this window and an agent will be with you soon”*  VS  *“*You are second in the queue. An agent will be with you soon.” |  |
|  |

### PCS Link vs. In-chat Likert Scale

1. At the end of each chat experience, you were asked if you would be willing to take a post chat survey to rate your experience. Would you have responded differently if those questions were presented within the chat window, with the option to rate each question on a scale of 1-5?

|  |  |
| --- | --- |
| **PSC Response** | **Selection (place X)** |
| Group L | |
| *“*Please help us improve our services by taking a short survey at [dummy link]”  Vs  *"Would you be willing to take a quick survey on how we did? Please rate the following questions on a scale of 1-5.”* |  |
|  |
| Group M | |
| *“*Please help us improve our services by taking a short survey at [dummy link]”  Vs  *"Would you be willing to take a quick survey on how we did? Please rate the following questions on a scale of 1-5.”* |  |
|  |

## Conclusion

1. Any other comments you'd like to mention before we wrap up?

## Close Out

Great, thank you for your feedback today. [*optional: I’d like to open it up to my teammates on the line to see if they have any questions that they might like to ask*.]

Well, again, on behalf of our team, I’d like to thank you for your time today. Your feedback and insights will play an important role in helping us build an accessible and helpful chatbot experience.

Thank you. Enjoy the rest of your day! Goodbye J