Omnichannel HCD Chatbot User Testing Plan – Phase III

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Client: VEO Multi-channel Technologies (MCT)

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# Overview

Team:  
Department of Veteran Affairs (VA)

VEO Multi-Channel Technologies (MCT)

## Product

MS Virtual Agent (Chatbot)

MS Dynamics Omnichannel for Customer Service (Agent CRM)

## Background

VA contact centers are working to create an omnichannel experience by implementing Microsoft Dynamics365 across lines of business (LOBs). While the technological aspects are researched and understood by both stakeholders and the Office of Information Technology (OIT), Human-Centered Design is required to understand the different user segments who contact VA contact centers and their preferred channel preferences for communication.

The human-centered design (HCD) team will use an HCD approach to test past insights and prioritized use cases for VA’s pilot omnichannel chatbot and chat experience. User testing validates insights and helps better understand user needs so that the HCD team can refine prototypes and provide recommendations that are both functional and intuitive.

This effort is related to the current Omnichannel Experience study with 90-minute sessions conducted 2/8–4/9, and the same DSVA (Digital Service at VA) Slack channel may be used.

# Method

1. What method of research are you planning?
   * Remotely moderated interviews with Veterans where they have a link to an interactive chatbot prototype that will guide them through specified scenarios.

1. Why this method? How does this methodology help you answer your research questions?
   * This approach will allow us to understand the desirability of certain key chatbot capabilities to inform feature design and development.

1. Where are you planning to do your research?
   * Remote
2. What will you be testing? \*(Design mocks, card sort, prototype, page, content, etc.) \*

* VA chatbot & live chat prototypes

1. Remote: What tool do you plan to use?

* Perigean: Zoom video conferencing, screen sharing, and dial-in number.

## Research questions

What question(s) do you hope to be able to answer after completing this research?

We will test chatbot capabilities with Veterans to understand Veteran preference and help guide design recommendations for chatbot and chat development.

User Testing Objectives

1. Validate Veteran reactions to chatbot error handing 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 perception of screener methods to escalate from chatbot-to-live agent.

## Hypothesis

What is your hypothesis for this research?

* Providing users visual guidance through buttons and proactive engagement, as well as a smooth escalation from chatbot to live chat agents, will give Veterans a positive experience when engaging with a VA omnichannel chat platform.

# Participants and Recruitment

## Participant criteria

What are you looking for in a participant?

* 10 user testing sessions
* Recruits need to reflect the following VA.gov user types:
  + 4 New VA.gov user type
    - New VA.gov users include participants who do not have much previous experience using VA.gov to find information or navigating their online content. They may either not have a VA.gov online account or have recently set up their account.
  + 3 Non VA.gov user type
    - Non VA.gov users include participants who do not use VA.gov to find information and do not have an online account.
  + 3 Active VA.gov user type
    - Active VA.gov users include participants who frequently use VA.gov to find information and/or actively use their VA.gov online account.
* Recruits need to reflect the following geographic area types that aligns with the U.S. Census Bureau documented in [Defining Rural at the U.S. Census Bureau.](https://www2.census.gov/geo/pdfs/reference/ua/Defining_Rural.pdf)
  + 5 Rural Users
    - Population density areas with a population of 49,000 or less.
  + 5 Urban Users
    - Population density areas with a population of 50,000 or more.

## Screening Questions

* Can you access a laptop or desktop computer with an internet connection? (If not, then do not recruit.)
  + If yes, then continue.
* If not, then do not recruit.  Do you have access to an internet browser on a mobile device, either smartphone or tablet?
  + If yes, then continue.
  + If not, then do not recruit.
* Language: Must be fluent in spoken English so the researchers can communicate with them.

## Demographics

* Rationale:
  + Mirror general Veteran population and over-sample largest minority groups based on the national Veteran population model: <https://www.va.gov/vetdata/docs/Demographics/New_Vetpop_Model/Vetpop_Infographic_Final31.pdf> and <https://www.va.gov/VETDATA/docs/SurveysAndStudies/VETPOP.pdf>
* Gender
* 5 or more women
* 5 or more men
* Race and Ethnicity
* 3 or more Black or African American
* 1 or more Hispanic
* 5 or more White
* 1 or more other racial/ethnic groups
  + Age
    - 2 or more 18-24 (U)
    - 1 or more 25-34 (W)
    - 1 or more 35-44 (X1)
    - 2 or more 45-54 (X2)
    - 2 or more 55-64 (Y1)
    - 1 or more 65-74 (Y2)
    - 1 or more 75 and older (Z)
* Please track the same demographic information as the Omnichannel Experience Strategy study so this team can compile an aggregate report on all participants throughout this project.

## Recruitment Strategy

Please recruit via the existing recruiting contract.

# Testing Details & Timeline

## Notional Timeline

|  |  |
| --- | --- |
| Design Plan Submission | May 17 |
| Design Concepts | May 21 |
| Facilitation Guide Completed | May 28 |
| Design Prototypes and Test Plan | June 11 |
| Test Sessions Completed | June 25 |
| Testing Results Evaluation | July 9 |
| Design Recommendations | July 12 |

## Testing Timeline

1. Timeline: What dates do you plan to do research?
   1. June 14th – June 25th
2. Prepare: When will the thing you are testing be ready? (Goes without saying but should be a few days before testing will begin.)
   1. June 9th

1. Length of Sessions: How long do you estimate each session will be? (This helps with scheduling & thank you gifts.) e.g., 30 minutes, < 1 hour, up to 2 hours, up to 4 hours)
   1. 1 hour
2. Availability: If applicable, when would you like sessions scheduled? \*\*Please list exact dates and times in EASTERN Standard Time\*\*. Please request enough dates and time slots (e.g., Monday 9-1, 3-6; Tuesday 9-6, etc.). Be as flexible as possible, cognizant that many Veterans are only available before and after working times, and live across the U.S.
   1. Our goal is to speak to 10 Veterans.
   2. Please allow at least 15 minutes between each 60-minute session.

* Monday, June 14th:
* Tuesday, June 15th:
* Wednesday, June 16th:
* Thursday, June 17th:
* Friday, June 18th:
* Monday, June 21st:
* Tuesday, June 22nd:
* Wednesday, June 23rd:
* Thursday, June 24th:

1. Pilot: Please indicate a date before your sessions begin for piloting your research. Which member of the design team will you pilot your research with?
   1. Wednesday, June 9th, 2021 (preferably between 12pm and 5pm ET)
   2. Chris Beard, Melody Laishram, and Kateleigh Clark can serve as the POCs for the pilot: [Christopher.beard1@va.gov](mailto:Emily.Muller@va.gov) ; [Melody.Laishram@va.gov](mailto:Melody.Laishram@va.gov) ; [Kateleigh.Clark@va.gov](mailto:Kateleigh.Clark@va.gov)
2. Additional recruiting requests:
   1. Confirm in advance that each Veteran participant has access to a computer or laptop, and tablet or smartphone with connection to the internet.
   2. To reduce the no-show rate, please do the following:
      1. Confirm each interview with the participant in advance.
      2. Text or email a reminder to each participant the morning of their interview.
      3. Call the Veteran to confirm if you do not hear back.

## Team Roles

Please list the people who will be serving in each role. \*\*Include the primary phone number for moderator and the emails for moderator, notetaker, and observers. If you need Perigean to take notes for you, indicate that next to Notetaker\*\*

* Moderators:
  + Kateleigh Clark
    - 973-271-5889
    - [Kateleigh.Clark@va.gov](mailto:Kateleigh.Clark@va.gov)
  + Christopher Beard
    - 850-864-4300
    - [Christopher.Beard1@va.gov](mailto:Christopher.Beard@va.gov)
  + Melody Laishram
    - 408-315-5481
    - [Melody.Laishram@va.gov](mailto:Melody.Laishram@va.gov)
* Research guide writing and task development (usually but not always same as moderator): Kateleigh Clark, Melody Laishram, Christopher Beard
* Participant recruiting & screening: Perigean.
* Project point of contact: Kevin Clawson and Medha Kulkarni (VEO Project Managers); Chris Beard, Kateleigh Clark, and Nathan Lucy (VEO HCD Team)
* Participant(s) for pilot test: Moderators, Observers, and TBD
  + Names of pilot test users will be updated once participants are identified.
* Note-takers: Moderators.
* Observers:
  + Kevin Clawson: [kevin.clawson@va.gov](mailto:kevin.clawson@va.gov)
  + Medha Kulkarni: [medha.kulkarni@va.gov](mailto:medha.kulkarni@va.gov)
  + Luciana Morais: [luciana.morais@va.gov](mailto:luciana.morais@va.gov)
  + Ahmed Kochaji: [ahmed.kochaji@va.gov](mailto:ahmed.kochaji@va.gov)
  + Chase Collins: [chase.collins@va.gov](mailto:chase.collins@va.gov)
  + Charles Tubbs: [charles.tubbs@va.gov](mailto:charles.tubbs@va.gov)
  + Steve Gabris: [steve.gabris@va.gov](mailto:steve.gabris@va.gov)
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  + Chad Gerstman: [chad.gerstman@va.gov](mailto:chad.gerstman@va.gov)
  + Laura Falendar: [laura.falender@va.gov](mailto:laura.falender@va.gov)
  + Nathan Lucy: [nathan.lucy@va.gov](mailto:nathan.lucy@va.gov)
  + Tasmia Moulvi: [Tasmia.moulvi@va.gov](mailto:Tasmia.moulvi@va.gov)
* Confirmed participants:

**Several team members are contractors with Booz Allen and Aptive Resources. Please ONLY use VA.gov email addresses to protect Veteran PII. Thank you!**