**Research Plan for MCT Omnichannel, Experience Strategy Future State Design**

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Points of contact: Vidya Mantrala, Kt Gregory, Kateleigh Clark (Booz Allen HCD); Kevin Clawson (Veterans Experience Office (VEO) Multi-channel Technologies (MCT)

**Goals**

1. **What product & team are you doing this research for?**

Team: Department of Veterans Affairs (VA) Veterans Experience Office (VEO) Multi-channel Technologies (MCT)  
Product: Omnichannel Experience Strategy Future State Design

1. **Background:** The VA Multi-Channel Technology (MCT) Omnichannel Experience Strategy team seeks to build upon previous Veteran and CSR experience research to develop and present design prototypes that will inspire and inform a 2–3-year development roadmap for omnichannel contact center improvement.
2. **Research questions:**
   1. What problems will this concept help you address?
      1. How can VA ensure that the Veteran, caregiver, and beneficiary experience is represented in the prioritization and long-term strategic planning for MCT platforms and products?
      2. How might we streamline the customer experience across VA touchpoints, so they spend less time, effort, and experience fewer steps from issue to resolution?
   2. How does or doesn’t this concept fit into Veteran needs and lifestyle?
      1. Assess desirability of certain concepts in addressing and solving pain points and user needs uncovered in the initial Experience Strategy research
      2. Assess how different roles will use the concept (i.e. Veterans, Caregivers, Beneficiaries, and Transitioning Service Members)
   3. Of the key features listed, which ones are a priority? Which ones can be removed?
      1. What is dependent on technology constraints?
      2. What needs further accessibility consideration?
3. **Hypothesis:** What is your hypothesis for this research?

Our hypothesis is that giving Veterans and users a central, user-facing customer experience dashboard will address user needs for a more streamlined and transparent omnichannel customer service experience?

**Method**

1. Research Methodologies:
   1. Directed interviews; co-design session with low-fidelity prototypes
   2. All interviews and activities will be remotely moderated and tailored to meet participant needs or constraints
2. Why this method? How does this methodology help you answer your research questions?
   1. Directed interviews allow the team to gather specific, nuanced feedback regarding role-based features to the different concepts
   2. Due to the COVID-19 pandemic, these sessions will be remote
   3. Co-Design methods will help the research team collaborate with the users to create more desirable concepts that meet their contexts
3. Where are you planning to do your research?   
   The research team will use Perigean Zoom and MURAL as a remote facilitation tool. This methodology was also used in the Discovery Phase of this effort
4. What will you be testing?   
   We will be testing low fidelity MURAL concepts or storyboards
5. If remote: What tool do you plan to use?   
   Perigean Zoom

**Participants and Recruitment**  
Please list your participant criteria in two categories-

* 1. **Primary criteria / Must have** - what absolutely must be true in order to run your study? The clearer you can write this criteria, the easier it is to find matches for your study. (i.e. if your study will only work if you're talking to Veterans who have My HealtheVet premium accounts, mention that here. OR, if you are using a prototype tool that will not work well with screen readers, mention that as well.)

The pool of participants should be comprised of at least 10 individuals with the following demographic and user characteristics:

At least 5 or more Veterans to include:

* + At least 2 aged 65 or older
  + At least 2 aged less than 65
  + At least 1 Veteran of any age who identifies as a woman
  + At least 2 Caregivers: Defined as an official or unofficial provider of support necessary for Veterans to complete activities of daily living. (May also be a Veteran, but is not included as one of the 5 required)
  + At least 1 Beneficiary utilizing VA benefits as a dependent
  + 2 Transitioning Service Members or Veterans separated in the last 90 days
  + All participants should be able to join the interview using Zoom video and have a high speed internet connection, as there will be a visual, online, component to the testing. If this is not an option, a longer session (90 minutes) should be scheduled to account for time to communicate visual elements.
  + All participants need to have contacted Veterans Benefits Adminstration National Contact Center or Veteran’s Health Administration Office of Community Care, or Veteran’s Health Administration Member Services within the last 60 days. The more recently, the better. (We want to avoid participants who have only contacted VA about clinical healthcare issues.) Topics that are in scope include filing a claim, sending or receiving payments, changing or updating benefits etc.

1. **Secondary criteria / Would like to have** - what other criteria would strengthen your results?
   1. 3-5 Urban participants
   2. 1-2 Rural participants
   3. 3-5 people with recent (past 6-12 months) experience navigating VA.gov
   4. 3-5 people with no recent experience (12+ months) navigating VA.gov

*Pro tips for writing recruiting criteria:*

* If you have specific screener questions that YOU would ask a potential participant to determine eligibility for your study, list them here. For example, instead of saying "We want someone who has been to an urgent care facility recently", say "Have you been to an urgent care facility in the last 6 months? (Answer should be yes)"
* Do not assume that your recruiters or the participants know your products or requirements as well as you do. Provide links to products, clear descriptions, specifics, etc.

1. What is your recruitment strategy? (If in person, describe how you will find participants. If remote, mention if you plan to draw from the existing recruiting contract - Perigean - or if there are other places where you would like to reach out to find participants specifically for this project. If you need help, please contact Research Contract Lead.)   
     
   The team plans to use Perigean to manage participant recruitment for this project in a manner that is consistent with the previous phase of research. All research will be conducted remotely using online collaboration tools and video conferencing software, which limits the pool of participants to those who can be recruited using digital tools. This aligns with Perigean’s methods and limitations and will not require additional outreach or strategy for recruitment.

**When?**

1. Timeline: What dates do you plan to do research?
   1. Week 1 of testing: August 9-11
   2. Week 2 of testing: August 16-18
2. Prepare: When will the thing you are testing be ready? August 5th
3. Length of Sessions: 1-hour sessions with 15 minutes of Buffer time, unless extended time is needed to facilitate co-design activities for visually impaired or connection limited participants.
4. Availability: If applicable, when would you like sessions scheduled? **Please list exact dates and times in EASTERN Standard Time**.
   1. Monday – Wednesday 9-1PM or 3-6PM
   2. No more than 3 scheduled interviews per day
   3. At least 30 minutes between interviews
5. 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. August 5th, with Nathan Lucy, Kateleigh Clark, Steffanie Espat, Vidya Mantrala, and KT Gregory
6. Additional recruiting requests:
   1. Confirm in advance that each Veteran participant has access to a computer or laptop, with connection to the internet.
   2. To reduce the no-show rate, please do the following:
      1. Text or email a reminder to each participant the morning of their interview.
      2. Call the Veteran to confirm if you do not hear back, or email address is invalid.

**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**

* Moderator: Vidya Mantrala ([vidya.mantrala@va.gov](mailto:vidya.mantrala@va.gov), 573-999-7206)
* Research guide writing and task development (usually but not always same as moderator): Vidya Mantrala
* Participant recruiting & screening: Perigean team
* Project point of contact: Kateleigh Clark ([kateleigh.clark@va.gov](mailto:kateleigh.clark@va.gov); 973-271-5889)
* Participant(s) for pilot test: Steffanie Espat, KT Gregory
* Note-takers:
  + KT Gregory ([katherine.gregory@va.gov](mailto:katherine.gregory@va.gov), tel. 8284000938)
  + Tasmia Moulvi ([tasmia.moulvi@va.gov](mailto:tasmia.moulvi@va.gov))
  + Kateleigh Clark
  + Nathan Lucy ([Nathan.Lucy@va.gov](mailto:Nathan.Lucy@va.gov))
  + Kevin Clawson ([kevin.clawson@va.gov](mailto:kevin.clawson@va.gov))
* Observers: **List email addresses for those who should attend and observe the sessions: VA Stakeholders, engineering team members, design team members, any other people who might find this research relevant to their work**. Please do not invite these observers. Only 1 or 2 will **attend each session. Our team is managing a signup sheet and will forward the invitation to the correct observers.** 
  + Medha Kulkarni ([medha.kulkarni@va.gov](mailto:medha.kulkarni@va.gov))
  + Ahmed Kochaji (ahmed.kochaji@va.gov)
  + Laura Falender ([laura.falender@va.gov](mailto:laura.falender@va.gov))
  + John Rocco ([john.rocco@va.gov](mailto:john.rocco@va.gov))
  + Reginald Martin (reginald.martin@va.gov)
  + Tasmia Moulvi (tasmia.moulvi@va.gov)

**Resources**

* [Project Brief](https://teams.microsoft.com/l/file/9533087C-4FD2-4995-A5EC-DDDC5ACA6442?tenantId=e95f1b23-abaf-45ee-821d-b7ab251ab3bf&fileType=pdf&objectUrl=https%3A%2F%2Fdvagov.sharepoint.com%2Fsites%2FOmnichannelExperience%2FShared%20Documents%2FOmni%20Channel%20HCD%2F04%20Design%2FExperience%20Strategy%20Phase%20II%2FMCT%20OC%20Experience%20Strategy%20Project%20Charter%20Phase%202.pdf&baseUrl=https%3A%2F%2Fdvagov.sharepoint.com%2Fsites%2FOmnichannelExperience&serviceName=teams&threadId=19:75a11abf78274b2bb1c5032000076acd@thread.skype&groupId=575bb298-dac9-4256-82cc-2598f3298ecc)
* Convo Guide *Discussion guide should live in the appropriate va.gov-team product folder, simply paste a link to it here*
* Synthesis *Link to any documents used for synthesis (Mural or RealTIME board boards, excel sheets, other data outputs, etc.)*
* Lessons Learned *Did you have any takeaways from the process of this research round that you want the team to remember for the future? Document them here.*
* Read-Out/Results
  + *Read-out presentation should live in the appropriate product repo and folder; paste a link to it here.*
  + \*\* Don't forget to add a link to your research folder to the research tracker! <https://github.com/department-of-veterans-affairs/va.gov-team/blob/master/platform/research/research-history.md>