U.S. Department of Veterans Affairs

Veterans Experience Office

Multi-Channel Technologies Digital Customer Conversations

Content Playbook

September 2022

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Introduction

This playbook is a final product of the Human-centered Design (HCD) process. The HCD team and Veterans Affairs (VA) Veterans Experience Office (VEO) worked in tandem to complete four phases: Scoping, Pre-discovery, Research, and Design. The first three phases established the foundation for the Design phase, which resulted in this playbook. This effort 's research was confirmatory, not generative, and its findings are broadly applicable across all channel types.

This playbook presents these findings in an actionable format for VA content creators and reviewers to assist them in creating a cohesive experience.

Recommendations in this playbook are guided by four key content pillars: Welcome, Inform, Interact, and Confirm.

What is HCD?

Human-centered design is a methodology that focuses on understanding and designing for the people most affected by a topic or issue. It seeks to identify unmet needs, understand diverse perspectives, and inspire ideas to improve people's experiences.

For more information about HCD, visit methods.18f.gov.
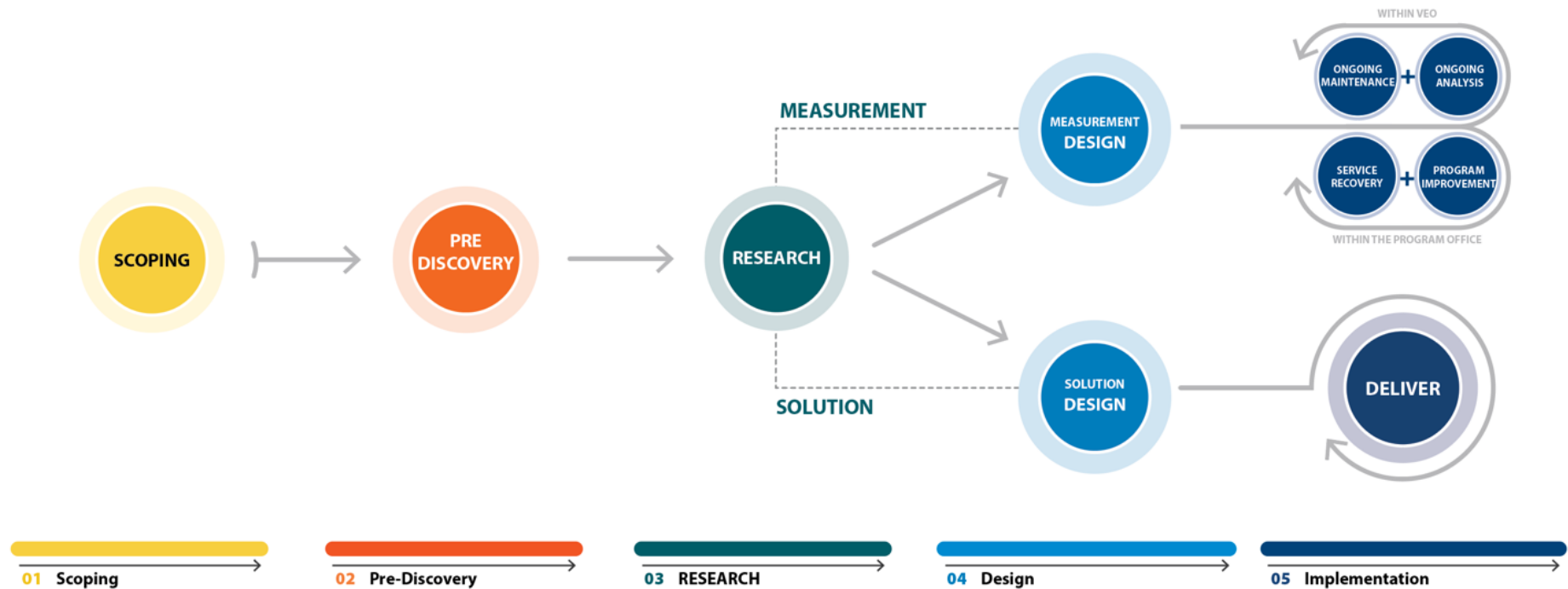
Channels Reviewed

Building off previous research at VEO, the HCD team identified the primary types of digital methods Veterans use to contact VA: interactive voice response (IVR), messaging, and chatbot. The HCD team selected MyVA411 for IVR, Ask VA (AVA) for messaging, and the beta VA chatbot to represent each type of digital communication method. To test each of these channels, Veterans and family caregivers selected one of two scenarios; then, they described how they would attempt to resolve their selected issue in response to static images of AVA and VA chatbot, and they interacted directly with IVR.

Regardless of the type of channel, Veterans expected the same kinds of information to shape and guide their experience. However, they expected different depth and organization of content for different channel types. Ensuring that each kind of content is present and obvious in every channel will help Veterans effectively engage with the right part of VA for any need.

Factors in How Users Choose Channels

It should be no surprise that different people have different channel preferences. These preferences are shaped on many factors including:

- Familiarity with a channel type and anticipated ease of use
- Level of record keeping
- Response time
- Total time to reach resolution
- Communication style preferences or limitations
- Past experiences with VA

The weight individual users place on these factors varies by person. One participant reported that his preferences for communication with VA were the exact opposite of his preferences for personal communications. For personal and work communications, he chose text or chat, then email or messaging, and lastly phone. However, with VA, he chose to call first, message second, and chat last. This user noted that he prioritizes the time to reach a resolution above all, which is why he prefers to call VA, even though phone is typically his last approach to communicating. He chose messaging through AVA next because it provides time for him to think through his wording and make sure he captures everything he wants to say.

Due to the phenomenon of users opting to contact VA via channels that may not match their preferences for everyday communications, VA should develop content that is guiding, non-intrusive, and pleasant for users.

Users who begin their journeys with a tool that is not the same type as their personal preference may be more likely to encounter disappointment. Coupled with the possibility that a user may already be frustrated by the issue causing them to contact VA, it becomes even more important that all communication channels prioritize ease of use through improved content.

When users know what they can accomplish engaging with any channel, they can choose the most effective channel(s) for their situation. Clear boundaries for engagement within and across VA channels empower users to plan how they communicate with VA and understand if they will need to use multiple channels. Additionally, regular assurance throughout their experience that they engaged with the right part of VA further empowers users to find solutions to any issue they encounter.
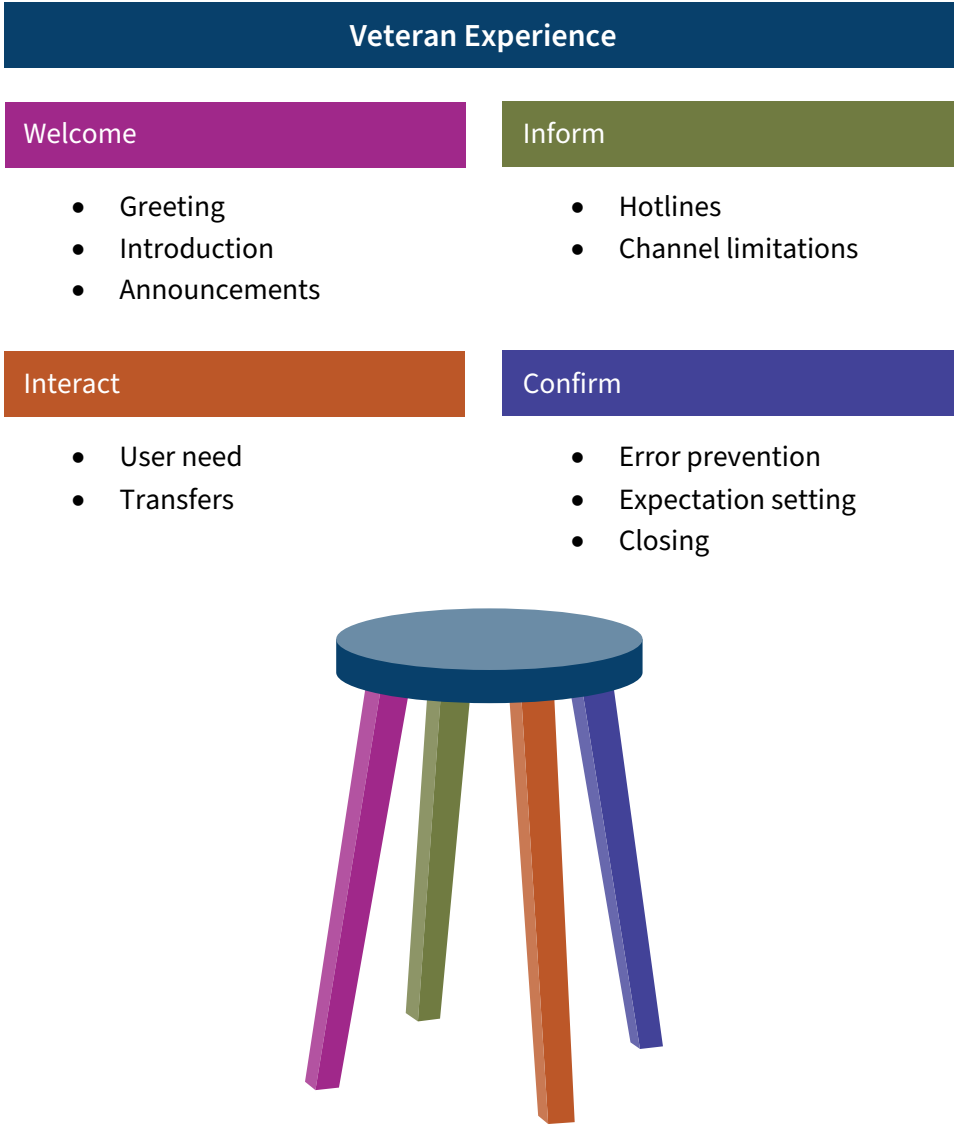
Content Pillars

User testing during the Research and Design phases uncovered and reinforced users' needs for four types of content while using a digital communications channel: Welcome, Inform, Interact, and Confirm. Each content pillar is fundamental to a user's success and perception of success as they use a digital communications channel.

There is no prescribed order for the content pillars. Typically, content appears in the order of Welcome, Inform, Interact, and Confirm; however, this order is overarching, and there are moments throughout the experience where content from different pillars is appropriate. For example, a form field displaying an error message showing "Phone numbers must include 10 digits" when a user enters nine digits for a phone number is an example of Confirm content before the end of an experience.

Content Pillars as a Stool

Imagine the content in a digital communication channel as a four-legged stool. Each leg represents a content pillar, which all support the seat, which represents the Veteran experience. The legs have no rank or order; they are all equally important in supporting the seat. If you remove one leg, the stool fails. Likewise, the content pillars have no rank or prescribed order, and removing one pillar results in a poor Veteran experience.

Veteran Experience

Welcome	Inform
• Greeting • Introduction • Announcements	• Hotlines • Channel limitations

Interact	Confirm
• User need • Transfers	• Error prevention • Expectation setting • Closing

Welcome

Welcome content provides the user with understanding and a sense of place. It affirms that the channel is VA owned and operated and that the user can resolve their issue(s) using the channel. The primary attributes of Welcome content are:

- Confirming engagement with an official VA service
- Providing purpose and intended use

What Content Must Do

Effective Welcome content does not have to be effusive or wordy; instead, it includes subtleties like the VA logo to assure users they are using a real VA tool.

Be Concise

User research findings indicate that users need brief Welcome content. They do not read long descriptions, and they skip over content that does not directly pertain to them or their current issue. Unfortunately, this means that they sometimes skip over relevant content because it gets visually or aurally lost in the irrelevant content. Where appropriate, content should include brief descriptive headings to break up Welcome content into scannable pieces.

Consider All User Types

Content irrelevant to some users may be relevant to other users. Preference testing for Ask VA (AVA) tested two types of Welcome content: benefits of logging in and topics AVA can support. Test participants were split on what type of content was more helpful (all participants tested both types and the order in which they saw each type was randomized). Two test participants in the design phase specifically mentioned that both types of content would be helpful depending on the user's level of proficiency with VA channels.

Present Consistent Descriptions

The description of the channel should be action oriented and should include VA's standards for response, both timeline and methods. If users do not know what they *can* do, they will try anything and will have implicit expectations that channels cannot meet. Action-oriented descriptions and clear expectations for VA responses prevent frustration and may redirect the user to a different channel before they begin the process with a tool that does not meet their expectations.

Appear Persistently but Be Unobtrusive

Time-sensitive channel-specific announcements and access to priority hotlines should be unobtrusive but always available. VA.gov provides a good example of persistent but unobtrusive content. The Veteran Crisis Line is always linked in the header, resources for Homeless Veterans are the second link in the footer, and the website template supports an alert banner to appear on all pages.

How Content Differs between Channel Types

Channels within the VA.gov Website Template

A channel housed within the VA.gov website template, like VA chatbot, does not require as much Welcome content because the logo and header communicate to users that the channel is operated by VA. VA chatbot will gain further credibility when it is accessible to all users and becomes part of the website template because its persistence in the VA.gov experience will prime users to know the VA chatbot is legitimate.

For chatbots in particular, the Welcome content should consider the space available and should prioritize brevity.

❌ Instead of
Welcome to the VA chatbot.
This bot can help you find general information on VA.gov.
To get started, you can ask questions such as:
- What's the PACT Act?
- What is my claim status?
- How do I apply for disability benefits?
- Is there an update on my appeal?

✅ Try
Welcome to the VA chatbot.
This bot uses artificial intelligence to help you find general information on VA.gov. It cannot connect you with a human agent, but it can help you find answers to questions like:
- What's the PACT Act?
- How do I apply for disability benefits?
- And much more

This approach clarifies that VA chatbot is not human and cannot connect users with a human. It also adds a bullet to indicate the listed questions are samples, not limits. In testing during the Research phase, Veterans repeatedly inferred that a bulleted list of capabilities were exhaustive, not suggestive.

Channels Using a COTS Product

Some channels use a commercial off-the-shelf (COTS) product and have less design flexibility. AVA, for example, currently uses Microsoft Dynamics, and cannot use VA.gov templates to communicate where the user is.

In these cases, Welcome content should include the VA logo and the same channel description used on VA.gov webpages to communicate to users they are using a legitimate VA channel. For AVA, the descriptive content should be updated on VA.gov to provide a more specific description that can be reflected on AVA's landing page.

As previously noted, both versions of AVA Welcome content tested in the Design phase were valuable to users. However, also previously noted, users skip over content that does not immediately seem useful to them. VA should use headings to break up content so users do not inadvertently skip content that would improve their experience.

✅ Try
Ask VA—or AVA—is an online tool that all Veterans and members of the Veteran community can use to submit questions, requests for information, concerns, and recommendations to VA. With Ask VA, you will receive an initial response within two business days. Depending on the complexity of your issue, resolution may require more than one message through Ask VA.

AVA's landing page currently provides no details on what it can do, what users should expect, or how users should use AVA. Likewise, the Contact VA and VA

chatbot pages currently provide no information on the timeline for response when using AVA. This approach can be used to provide detailed, but brief, information in all three places.

Audio-only Channels

Unlike channels with a visual component, audio-only channels like IVR require explicit confirmation that users have connected to a VA channel. This modality also requires hotline information and announcements to be spoken aloud, rather than included in the header or footer, or included after the actionable content.

Similar to how channels with a visual component allow users to skim over or completely ignore hotline information and announcements, VA should consider implementing the option to skip this content on audio-only channels. In the research phase, many users noted this content takes too much time or it upsets them to hear.

As a result, the HCD team tested the skip feature during the Design phase, and 10 out of 14 users chose to skip "priority announcements." While most (8 of 10) users still want the option to skip this content after listening to it, some users defined "priority announcements" as system outages, business hours, and related logistical information. As such any option to skip content should be specific.

✗ **Instead of**
To skip priority announcements and hear options for benefits press 9.

✓ **Try**
To skip crisis, homelessness, and COVID-19 information and proceed to the benefits and services menu, press 9.

Specificity in this approach only adds six words but also mitigates the risk of callers skipping content that is critical to them.

Summary

Welcome content must:

- Be brief
- Provide a sense of place
- Include a channel description that is consistent across VA.gov and all other channels and platforms
- Make any channel-specific announcements
- Include contact information for priority hotlines

Inform

Once users feel confident they are using a VA channel and know what that channel's capabilities are, the next information the user will need is Inform content. The primary attributes of Inform content are:

- Clarifying changes to or limits of channel interactions
- Providing alternatives for those who cannot use the channel or need other assistance

Notably, Inform content also tells users what a channel *cannot* do. Communicating a tool's limitations early in a user's experience prevents confusion and frustration stemming from using the wrong tool.

What Content Must Do

Describe Recent Updates

If a channel has had recent updates, Inform content alerts users and can prevent mistakes. However, this content should be unobtrusive. The VA.gov Design System has informational alert design treatments, which should, of course, be used for channels within the VA.gov website template, and should also serve as the starting point for content development for other channels.

Clarify Limitations

Inform content tells users how a channel should not be used and what it cannot do. Communicating this information early prevents frustration. For example, VA chatbot cannot provide users any medical test results. The VA chatbot would tell a user where to go to access this information but would not provide the information directly. Inform content for the VA chatbot would make it clear they will not receive their personal information through the chat.

Redirect Users When Necessary

Inform content directs users to the most appropriate channel(s). For example, after stating the response timeframe of two business days, AVA should note that MyVA411 and VA chatbot may provide faster responses for simple, non-emergency inquiries.

How Content Differs between Channel Types

Channels within the VA.gov Website Template

Inform content should appear early in the experience, and it may reappear throughout the experience to remind users of limitations and redirect users if they hit a dead end. Where possible, Inform content in channels within the VA.gov website template should follow the follow the VA.gov Design System.

Channels Using a COTS Product

Channels outside of the VA.gov website template should mimic the design in the VA.gov Design System as much as possible. For example, AVA has limited design flexibility and cannot incorporate the informational alert design treatment, but using the same hue of yellow to highlight alert text would provide users with some visual tie to VA.gov.

Audio-only Channels

Describing changes to an audio-only channel like IVR is the most significant Inform content. Typically, channels communicate recent updates with language like, "please listen closely as our menu options have changed." Because audio-only channels cannot perfectly reflect other VA channels, they should instead reflect the approach to Inform content users are likely to have encountered.

Inform

Summary

Inform content must

- Describe recent updates
- Clarify channel limitations
- Redirect users to more appropriate channels when necessary

Interact

Interact content is a versatile instrument for engaging users throughout the digital interaction. This content group is set apart from Inform content by its more tactical nature. While Inform content provides general and informative overview, Interact content calls users to action and decisively instructs them to interact with the channel. Some notable hallmarks of Interact content are:

- Providing directions for interaction
- Segmenting inputs logically

What Content Must Do

Interact content serves as the main structure to many user tasks in VA's digital communications. The content that users see after being welcomed and oriented to a channel is critical to maintaining user confidence as they transact with VA's communications modalities. Interact content can take many forms; however, it generally always directs a user through the completion of one or multiple tasks in the user journey.

Provide Brief Tasks and Group Tasks Logically

While Interact content varies across channels, research suggested that brief and well-grouped language was most useful to users. In testing sessions for AVA prototypes, users resonated with language models that grouped like-thoughts together. Concise task outlines, reiteration of core concepts, and logical segmentation of ideas allowed users to better distinguish the tasks at hand. Similarly, IVR prototypes that were modified to group key organizational concepts together in novel ways allowed for more intuitive system navigation

Furthermore, in Chatbot research, users reported a higher preference for a tool that restated its abilities in error handling, providing users with consistency throughout their journeys

❌ Instead of
I couldn't understand that. Please try again.

✓ Try
The bot couldn't understand that. As a reminder, ask this bot about claims, benefits, and more.

This approach reminds users that VA chatbot interactions are with a computer, not a human, and reiterates specific information to direct interactions.

Prioritize Relevance

In addition to being concise, Interact content in its best form is immediately relevant and practicable. Findings from user research and prototype modeling both underscored the need for only providing the user with the most pertinent language required for a task.

Users that interfaced with AVA prototypes described how unnecessary form fields could influence their perceptions of the tool. Users reported dissatisfaction when presented with required fields that they believed were not immediately relevant to their inquiry. Similarly, the simulated IVR presented in user testing validated the approach of skipping irrelevant announcements and ushering users toward selection prompts.

Interact

Summary

Interact content must

- Provide tasks that are brief to support feelings of accomplishment
- Group tasks logically
- Deliver timely instructions to reduce cognitive load on users and increase successful experiences

Confirm

Confirm content serves as a conversational bookend, providing users moments of closure and clarity. This content type can appear in multiple places throughout a digital interaction as a checkpoint or validation at the beginning, middle, or end of dialogue. Some main attributes of Confirm content are:

- Confirming user inputs
- Providing options for corrections

What Content Must Do

Confirm content serves as an intermittent break in conversation where a user is meant to engage and assess their selections. This type of content can often be both declarative and interrogative depending on the channel.

Redirect Users

When a user requires additional assistance, Confirm content serves as a method for presenting additional options. These checkpoints and endpoints are opportunities to redirect users to complementary channels that handle user inquiries. User viewpoints in research suggested that the option to redirect inquiries toward other channels was viewed as favorable, allowing users the freedom to seek assistance via multiple avenues at VA. Typically offered after multiple attempts or at the end of dialogue, this Confirm offramp can divert user inquiries to a better equipped or more capable channel.

Measure Success

Another unique attribute of Confirm content is the opportunity to gauge how the tool met or resolved users' needs. Research into this aspect of Confirm content revealed that users expected VA channels to circle back after a proposed solution and ask if the tool had resolved their inquiry or if the user had any additional questions. This content moment provided users with the confidence and assurance that VA was invested in resolving the inquiry, a powerful closing impression of the organization.

Re-start the User Journey

The Confirm content type also provides a natural launching point for restarting an inquiry in a digital interaction. Insights from user research indicate that leveraging Confirm content for transporting users to earlier spots in their journey is a favorable maneuver. In some cases, Confirm content moments can allow a user to catch and error and go back a step to correct it. In other uses, Confirm content can present a cloverleaf to the beginning of their journey to completely restart their interaction from a clean slate.

How Content Differs between Channel Types

User research found that in some cases, different Confirm content moments were inappropriate for a modality. While AVA and Chatbot confirm moments largely followed convention, IVR testing revealed that users did not appreciate additional or repetitive checkpoints in their journeys; users expressed frustration at how long IVR resolution would take. Instead of verifying all selections, it is recommended that IVR Confirm content be presented in the form of the resulting auditory feedback from selecting followed by promptly beginning the next voice response.

In the example below, simply acknowledging that a selection has been made and stating that the user has arrived at a new list of topic options is in line with the results of research and testing.

Confirm

Instead of
❌ *You've selected Health. If that's correct, press 1. If not, press 2.*

Try
✓ *Okay, Health. For Health Benefits, press 1. For Prescription Refills, press 2.*

Additionally, while AVA and Chatbot feature natural pauses and breaks for Confirm checkpoints and endpoints, some IVRs, like the MISSION Act, do not allow the user to rejoin their journey at an earlier pre-transfer point. Instead, the observed IVR allows users to backtrack to only the most recent menu. Due to this, users in some cases might not realize their selection error until being transferred to a CSR.

Instead of
❌ *To return to the previous menu, press 8.*

Try
✓ *To return to the previous menu, press 8. To return to the main menu, press 9.*

Summary

Confirm content must

- Redirect Users
- Measure success or progress
- Allow the user to restart their journey from multiple points in the interaction
- Adapt to the modality for appropriate usage

Conclusion

The broad pillars developed for this research ensure that content presented to users facilitates their engagement across VA channels but does not ensure that these touchpoints are practically navigable. Seamless navigation requires an understanding of individual engagement, user needs, channel limitations, and overall experiences. VA will need a holistic view of how channels are connected, and where system overlaps should be strengthened. As VA continues modernizing and improving the user experience, it is critical that product teams examine additional factors, like intent, that affect content presentation across channels.

Unconnected journeys lower confidence in all channels

An integrated approach that understands how, why, and when users engage is of great need for VA. This approach must consider how varied the user population of VA is, how access or use of channels is limited, and the potential harms or burdens created by a lack of response. When users seek assistance, they encounter siloed touchpoints that do not recognize their identity,
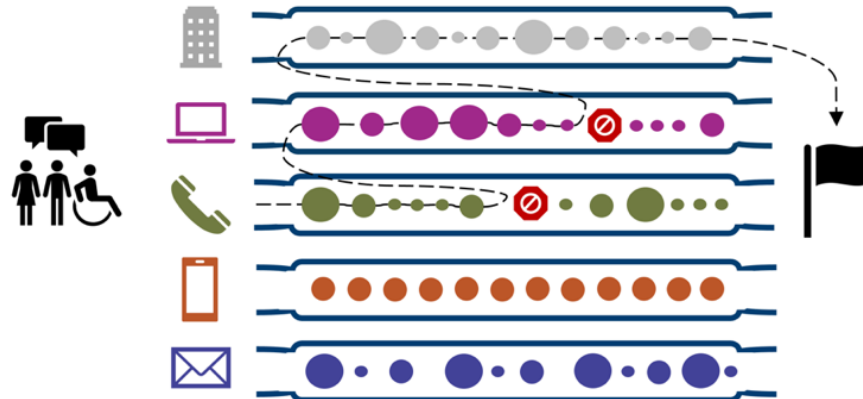
engagements, open requests, or efforts to reach resolution across channels. Users quickly realize that VA cannot assure them that they will reach a timely resolution because of the lack of integration and tracking between systems. User confidence is thereby diminished, and they have to take on the burden of managing VA, ultimately resulting in a poor experience and decreased trust.

In addition, false linear journeys fragment across siloed products and contact centers. Instead, VA ought to promote integrated journeys which interact with multiple touchpoints in the Omnichannel Ecosystem.
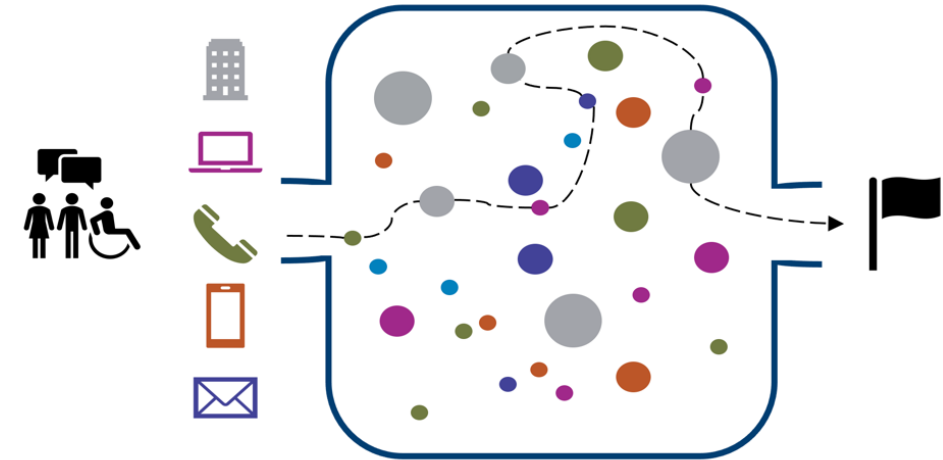
As a future step, VA may consider creating an ecosystem map, locating the different touchpoints between channels in a service design blueprint for omnichannel experience. Doing so would identify connection types, where they intersect, and where handoffs are not set up (i.e. the users have to start over).