Voicebot Research Facilitation Guide

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[Team: 1](#_Toc106865414)

[Background 1](#_Toc106865415)

[Key Objectives 1](#_Toc106865416)

[Facilitation Guide Introduction 2](#_Toc106865417)

[Agenda 3](#_Toc106865418)

[VBA Voicebot Interview 3](#_Toc106865419)

[Mapping Activity 4](#_Toc106865420)

[Closeout 5](#_Toc106865421)

Team:  
Department of Veteran Affairs (VA), Veteran Benefit Agency (VBA) Voicebot Team

## Background

The VBA Voicebot team seeks to use human-centered design (HCD) research methods to evaluate Veteran expectations and desired experiences for a VBA voicebot for telephony, specifically its disability compensation claims status related content and information, as well as, PACT Act claim general information.

This project will focus on the desired experience for Veterans, caregivers, and family members calling the VA National Call Center and selecting to use the Voicebot telephony option. User research will focus on the desirability and perceived usefulness of claims status and PACT Act related content and information via a notional Voicebot which will inform future product roadmaps and content.

## Key Objectives

Understand user expectations and desires around the information and interactions a telephony Voicebot assistant can provide about Veterans Benefits Administration (VBA) claims status and PACT Act related topics.

### Questions by Topics

|  |  |
| --- | --- |
| **High Priority** | |
| ***Topic*** | ***Supporting Questions*** |
| Voicebot Content Presentation Voicebot Personality Utterance Collection | 1. How consistently is information expressed? 2. What type of personality did the Voicebot have? 3. How would you ask questions of a Voicebot? |
| **Medium Priority** | |
| ***Topic*** | ***Supporting Question*** |
| Content Cognitive Load | 1. What can you recall usefully from the Voicebot’s response? |

### Pre-Session Form information

### Prior to the session, the team will send a MicroSoft Forms to internal VA test subjects to collect general demographic information to include their experience and knowledge of the VA claims process and their role at the VA.

### One-on-One Interviews

One-on-one interviews allow the team to probe into the user’s past experiences and identify significant expectations or concerns for their future service interactions.

Benefits

* One-on-one interviews are designed to aid the facilitator in conducting the interview.
* The conversational structure of the interview allows the facilitator the ability to react to a user’s response, improves a line of questioning that might result in unexpected findings, and reduces bias by gathering user responses before beginning the activity.

Limitations

* Users may withhold information from the research team.
* What the user says may not always match their real-life interactions.

# Facilitation Guide Introduction

***Observer instructions:***  
 Before the session starts, here are some guidelines:  
 1. You may change your video conference display name to be just your first or preferred name. We encourage you \*\*not\*\* to change your name to “observer.”  
2. Sign into the session with your microphone muted.  
3. If you aren’t admitted directly: Wait in the MSTeams waiting room while the moderator begins the session - If the participant approves your presence, as in the majority of cases, the moderator will soon admit observers into the session - If there are issues, the moderator should be in contact via [Slack](https://dsva.slack.com/archives/C0476EPFL65).  
4. At the moderator’s prompt, unmute your camera and microphone and briefly introduce yourself with: Your first or preferred name - Your role with [VA.gov](http://va.gov/).  
5. When that’s done: - Mute your microphone - Turn off your camera.  
6. Confine all messaging to the [Slack Voicebot\_test1\_feedbackchannel](https://dsva.slack.com/archives/C0476EPFL65) thread for the session: - Don’t message within the video conference app - Don’t expect the moderator to interact with you.  
7. Notetaker: friendly reminder to take notes that are as close to verbatim as possible.

***Introduction Script. [0-2 min]***

Thank you for taking the time to give us your feedback. My name is [*insert name*], and I will be facilitating today’s feedback session. If you would all take a turn to introduce yourself and what your role in at VA followed by muting and turning your camera’s off that would be great.

Thank you for that.

To review our goals for today - we are working with VA to improve user experience of contacting the VA about topics related to Veteran disability compensation claim status and PACT Act. Our goal is to gather feedback on a planned Voicebot for telephone interaction. What is different about this Voicebot is that is uses natural language understanding technology. This technology is similar to voice interactive technology found in smart speakers - like Amazon Alexa, Apple’s Siri and Google’s Hey Google - that analyze someone’s speech and what they are asking when it interacts with them.

With your permission, we are going to document this session using written notes, audio, and 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?

Great, thank you. I will begin the recording and then ask again for our records.  
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. **[Additional Notes]** I also wanted to let you know that your participation is entirely voluntary, and we can stop at any time. You are welcome 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 all right?

## Agenda

To give a quick **overview** of what we will run through, here is our agenda for today:

This session is set to be no more than one hour. We will have you listen to recordings which are audio mock ups of a Veteran caller interacting with a notional telephone based Voicebot when calling the National Call Center. There are three audio recordings that simulate calling into the National Call Center We will go through each twice audio recording twice. Once to hear the full experience and gather some general feedback. The second time, listening and pausing at different places in the recording to ask for specific feedback. It is important to remember that there are no right or wrong answers. We are here to learn from you and really try to understand your experience and what you would like from a Voicebot in the future. So please do not feel that you need to hold anything back. We want to hear everything!

I will close with a few follow up questions and allow some additional time for you to ask us any questions that may have come up.

Do you have any questions at this point?

## VBA Voicebot Interview

VA Information Gathering

**[3 – 8 min] First Scenario:** Dave is a Veteran calling into the National Call Center. He dials 1-800- 827-1009 to the National Call Center using the keypad on his smartphone. Dave chooses to try the new Voicebot and get some clarity on his claim status.

This audio clip will take about 4 minutes. Please just listen and then we will have a few questions.

**[Full Audio Mock Up #1 Plays]**

**[9 – 12 min]** There were two automated voices when Dave called in. The first was the NCC call line that gave prompts for number selections and then Dave, when offered, selected to use the Voicebot assistant to find out about claim status.

1.a) What were some of your overall impressions of the Voicebot’s personality when working with Dave the Veteran caller?

Did you feel the Voicebot’s language, tone and style of speaking align with your perception of the VA’s brand?

1.b) Can you list some personality traits that you would like to see in a Voicebot when calling? (ex: patient, trustworthy)

1.c) What were your impressions of the Voicebot’s rate of speech when providing information? Was it too fast, too slow or just right?

1.d) (internal VA) Considering how we want to provide world class service to our Veterans, does this bot perform as you think it should? How would you want Veterans feel about the Voicebot experience?

**Facilitator:** Thanks for those inputs. Now we are going to listen again and pause to ask for your inputs.

**[Paused Audio Mock Up #1 Begins]**

**Facilitator:** Now we are going to listen again and then pause.

*Audio 1.1: Welcome to the Department of Veteran Affair telephone assistance service.  
For VA information via the internet, please visit our website at www.VA.gov.*

*If you are having thought of suicide press seven now to be connected with the Veterans’ Crisis Line, or you may call 1800-273-8255, and then press 1. If you are calling to enroll a direct deposit, or to update your existing direct deposit information, please consider making this change at VA.gov. The VA.gov website is the fastest and most secure method to update your direct deposit information. Para espanol, apre numero dos.*

*The VA is constantly trying to improve upon their services. We have implemented a Voicebot that can help you with a variety of things.  If you would like to try it out, press seven now.   
Dave presses 7 on phone keypad.   
Voice Bot: [Welcome message. Ask me a question to get started…]*

1.1.b) After selecting 7 and hearing the Voicebot’s initial message, what did you understand the Voicebot can and can’t help you with?

**Facilitator:** Dave has just heard the Voicebot’s welcome and he is about to ask for help. Please listen and then we will pause.

*Audio 1.2: Dave: Yeah, my claims was closed as of 2022, does that mean that I have a  
decision or is it just closed? I understand you want to know about your claim status. First, let me verify some information for security purposes.*

*[Authentication – Voicebot provides claim status}*

1.2.a) Were the Voicebot’s replies what you expected or did you expect it to provide him with something else?

1.2.b) Consider how you would speak directly to a phone Voicebot. If you were unsure of why you claim - what would you say to the Voicebot in your own words?

**Facilitator:** In the next clip Dave will ask why the claim is taking long *Voice Bot and Dave asks why it is taking so long and the Voicebot gives him information and send more information via a text message.* and Now we are going to listen again and then pause.

*Audio 1.3.:* *Dave ask why it is taking so long*

*.  
Voice Bot: Sure, I am sending a text to the cell phone number on your account ending in 7654, with all of the details we have discussed. Is there anything else, I can help you with today?  
User: No, that’s it.  
Female Voice Bot: Thank you for calling the Department of Veterans Affairs. I hope you have a wonderful day. Good-bye*.

*[ min recording mark]*

1.3.a) When the Voicebot provided information on the length of the claims process, How reliable did it seem? Why?

**[21-24 min] Facilitator**: Thanks you for your inputs. We are now going to move onto **the second of the three recordings.** It will take about 2 minutes, In this clip the Veteran caller, Hank, is calling for information about PACT Act and has already pressed 7 to use the Voicebot option. Please just listen and then we will have a few questions.

**[Full Audio Mock Up #2 Plays]**

2.a) What do you recall about the information the Voicebot provided about PACT Act?

2.b) How do you feel about this type of information being provided in an audio format?

**[29 - 36 min]** **Facilitator:** Thanks for those inputs. Now we are going to listen again and pause to ask for some more questions.

*Audio 2.1: [Welcome message] Hank: I'm thinking about filing a claim since the PACT Act was passed, but I don't know what a presumptive condition is and if I have one. [Audio mark*

2.1.a) Hanks the words used were ‘PACT act’ and ‘presumptive condition’ . Are there different terms that you would use to request information on PACT Act to the Voicebot?   
  
2.1.b) Now that we have thoughts about terms, what about a question form. How would you ask this or a similar question?

**Facilitator:** Now we are going to listen again and then pause.

*Audio 2.2: Voicebot: I understand you want to know about presumptive conditions under PACT Act. For some conditions, we automatically assume that your service caused your condition, and this is what we call a "presumptive condition."*

*If you have a presumptive condition, you don’t need to prove that your service caused the condition; you only need to meet the service requirements for the presumption.*

*A list of new presumptive conditions under PACT Act is on VA.gov. Would you like me to send you a link via text?  
 Caller: Sure.[Authentication]*

*Caller: Yes That is my phone number.*

*Okay, Dave. I've sent a text to the number associated with your account, ending in 7707.*

*If you think you’re eligible for VA health care and benefits, we highly encourage you to apply now. Is there anything else I can help you with?*

*Caller :No, that's it.*

*Voicebot: Thanks for calling the Department of Veterans Affairs. Have a great day.*

2.2.a) Do you have an opinion how the Voicebot explained “presumptive condition”?

**[21-24 min] Facilitator**: Thanks you for your inputs. We are now going to move **onto last of our three recordings.** It will take about 2 minutes. In this clip the caller, Cathy, is trying to get information about her spouse’s disability claim. The caller has already pressed 7 to use the Voicebot option. Please just listen and then we will have a few questions.

**[Full Audio Mock Up #3 Plays]**

3.a) Did the Voicebot reply in consistent manner?

3.c.) Did you feel the caller could have requested a human agent at any time in this call? Why or Why not?

**[29 - 36 min]** **Facilitator:** Thanks for those inputs. Now we are going to listen again and pause to ask for your inputs.

*Audio 3.1: [Voicebot Welcome Message]*

*Hi, my husband recently started a disability claim, but he has a condition that he can't include in the form....how can I add to his claim?*

3.1.a) Consider how you would speak to the Voicebot. If you were calling for a loved one or friend with questions about a disability claim for them, What are some other ways that you could have asked this question?

**Facilitator:** Now we are going to listen again and then pause.

*Audio 3.2: I'm having some difficulty understanding what you are asking. Can you try again?: Caller: I just need some help with my husband's disability claim.  
Voicebot: Currently, I am not able to assist caregivers with a Veteran's claim, but I can transfer you to a call center agent who will be able to help. Would you like to be connected now?  
Caller: Yes.  Voicebot: One moment please...*

*[Audio mark 2:04]*

3.2.a) This call included an error in the Voicebot understanding the Cathy. How do you think the Voicebot handled that?  
  
3.2.b) This call also included a request beyond the Voicebot’s capability. How do you think the Voicebot handled that?  
  
3.2.c) What is another way in which you would you have liked for the Voicebot to respond instead?

## Closeout

Great, thank you for your feedback today. [*Optional: I’m going to take a moment now to open it up to my teammates on the line to see if they have any questions that they might like to ask*.]

Again, on behalf of our team, I would like to thank you for your time today. Your feedback and insights will play a key role in helping us build an accessible and helpful voicebot telephone experience.

## Thank you. Enjoy the rest of your day! Goodbye. After Session

After session, download recording and MSWord transcript of sessions to appropriate Teams folder.  
  
Send a thank you email to the participant and CC the test team members.

Subject Line:  
 ✨ Thank you from the Voicebot Team ✨

Body:  
First Name,  
  
Michele,   
  
Thank you for your participation in the input session today.  
   
Your feedback and insights will play a key role in helping us build an accessible and helpful Voicebot telephone experience.   
   
If you have any additional inputs or thoughts, please feel free to reach out to us.   
   
Have a great day!✨ 

First Name Last Name   
UX Strategy, Voicebot Team   
[email handler@va.gov](mailto:email%20handler@va.gov)