

Chatbots research: planning show and tell

15 March 2019

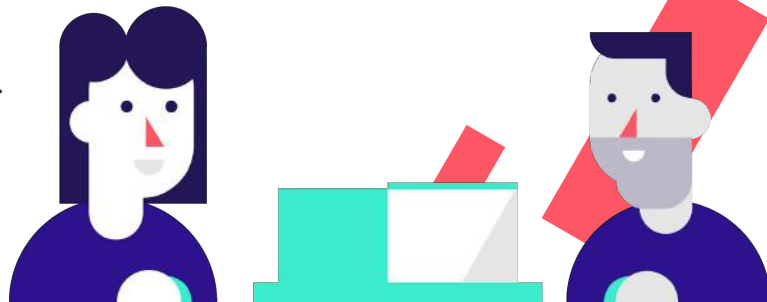
[Link to video of show and tell](#)

Key findings

Users

Here's a summary from the six users interviewed

- Two key journeys: 1) Users who are managing their own planning application, 2) Users who are checking or challenging someone else's planning application.
- Both journeys involve complex and subjective interactions and exchanges.
- In both journeys, there are high stakes and users are generally very invested. However, challenging a planning application is a more 'emotional' journey from the outset.
- Web and self help are the first port of call - however, if users are stuck, confused or need reassurance they will not hesitate to call.



Key findings

Experience maps



We created experience maps to illustrate key journeys.

- Process of managing my own planning application
- Process of checking and / or challenging someone else's planning application













Experience map – Process of managing my own planning application

Research Theme: **Council**

	Initial Contact	Ongoing contact and development	Submit Application	Council Response	Potential Appeal
User Needs	<p>I want to understand the application process</p> <p>So I can request the correct documentation and plan my time and actions accordingly</p>	<p>I want to get detailed advice regarding my application</p> <p>So I can reduce the risk of mistakes and failure</p>	<p>I want to submit my application</p> <p>So I can get legal approval from the council</p>	<p>I want to hear if I have been successful with my application</p> <p>So I can start work as soon as possible</p>	<p>I want to appeal my rejected application</p> <p>So I can get approval to start work that matters to me</p>
Actions + Tasks	<ul style="list-style-type: none"> Go on Council website Phone or email generic contact Email with further details 	<ul style="list-style-type: none"> Research online (Google / Council website / others) Phone / email support In person meetings 	<ul style="list-style-type: none"> Prepare documents and attachments Submit application online Pay for application 	<ul style="list-style-type: none"> Check emails Check post Call the council 	<ul style="list-style-type: none"> Speak to the council Check government website and do further research Amend plan / appeal
Channels + Devices	 <p>LAPTOP MOBILE LAPTOP WEBSITE CALL CENTRE EMAIL</p>	 <p>LAPTOP LAPTOP IN PERSON WEBSITE EMAIL 20 MIN</p>	 <p>LAPTOP WEBSITE</p>	 <p>MOBILE CALL CENTRE</p>	 <p>LAPTOP WEBSITE</p>
Emotional	<p>"There are so many ways to get in touch with the council - it is confusing... Its difficult to know what I can and cant ask"</p> 	<p>"After calling and emailing I was asked to come in person - if only I had known that from the beginning!"</p> 	<p>"I will have to call if I can't find what I need online!"</p> 	<p>"The council might or might not call, its unsettling. If I call them I can find out sooner."</p> 	<p>"I really don't want this to drag on! It is stressful and time consuming"</p> 
Pain Points	<ul style="list-style-type: none"> City or County Council website? Phoned council but was just told to email the details 	<ul style="list-style-type: none"> Confusion: pre / full application Can't send documents ahead of meeting - only 20 mins So much subjective information 	<ul style="list-style-type: none"> Couldn't pay for application online- had to call customer services What happens next? 	<ul style="list-style-type: none"> Want better ways to check status update Have to keep calling when they think there is news Post is too slow 	<ul style="list-style-type: none"> Additional work, time, money and stress Potential engagement with people who disagree with application
Compelling forces	<ul style="list-style-type: none"> Resident or architect contacting council? Anxious to make process as easy and painless as possible 	<ul style="list-style-type: none"> Time flexibility - ongoing research and contact (especially face to face) Anxiety - reduce errors & risk 	<ul style="list-style-type: none"> Habit of preparing documents using other software for content checks Anxiety - has it been received? 	<ul style="list-style-type: none"> Anxiety - has it been successful Anxiety - clock is ticking Habit - calling is quicker 	<ul style="list-style-type: none"> Anxiety - get it right this time Push to get things finalised quickly

Experience map - Process of checking and / or challenging someone else's planning application

Research Theme: **Council**

	Awareness	Initial search	Detailed research	Submit comments	Ongoing communication
User Needs	<p>I want to know whats happening in my community</p> <p>So I can challenge applications, protect my community</p>	<p>I want to seek details about a local planning application</p> <p>So I can understand how it can / does affect me</p>	<p>I want to seek details about policies and local plans</p> <p>So I can make a strong legal case to challenge the application</p>	<p>I want to submit my comments to the council</p> <p>So I can have them taken into legal consideration</p>	<p>I want to be kept informed</p> <p>So I can know the outcome of the application and be aware of future applications in my area</p>
Actions + Tasks	<ul style="list-style-type: none"> Keep an eye on local news Read council newsletter (if signed up) Check details 'yellow notice' 	<ul style="list-style-type: none"> Google search: specific application code Council website search Generic email / phone 	<ul style="list-style-type: none"> Research council website or planningportal.co.uk Contact experts for advice Meet community / experts 	<ul style="list-style-type: none"> Write out comments on Word Copy and paste into Council website or planningportal.co.uk Submit comments 	<ul style="list-style-type: none"> Phone and email council for updates Sign up for newsletter
Channels + Devices					
Emotional	<p>"You worry about running out of time to challenge the application!"</p> 	<p>"A generic email or phone number is frustrating - I just want to talk to someone who knows what they are talking about!"</p> 	<p>"There's no way around it - if you don't read the local guidance, you won't have a leg to stand on - it is a legal challenge"</p> 	<p>"What happens next? Will I be kept in the loop?"</p> 	<p>"I wouldn't need to phone if someone actually answered my emails!"</p> 
Pain Points	<ul style="list-style-type: none"> Council doesn't have to tell you You have to find it - but sometimes its not clear how to Surprise element - disagree with something 	<ul style="list-style-type: none"> City vs County Council? Cant find what I am looking for, feeling stuck Phoned but told to email more detailed information 	<ul style="list-style-type: none"> Complex and subjective information and jargon FAQ's are too generic Told to come in person after sending an email 	<ul style="list-style-type: none"> Unsure how comments will be used / how the process works Unsure about next steps Unsure on how to set expectations 	<ul style="list-style-type: none"> Not getting enough reassurance Waiting too long to find out whats happening Having to call for updates
Compelling forces	<ul style="list-style-type: none"> Anxiety - don't know how to challenge, how long do you have and will you succeed? Push - something is happening that I don't agree with 	<ul style="list-style-type: none"> Anxiety - need reassurance that I am doing the right thing Push - deadline means I have to act fast 	<ul style="list-style-type: none"> Anxiety - fear that I am not understanding or doing the right thing Push - following advice and instructions 	<ul style="list-style-type: none"> Push - following process set by the council Anxiety - fear that nothing will come of efforts 	<ul style="list-style-type: none"> Anxiety - no information, fear of not being in control Habit - calling means I can talk to someone and get answers

User interview quotes

“It is difficult because it is so subjective - lots of complex information you need to get your head around.”

“The council might or might not call, its unsettling. If I call them I can find out sooner.”

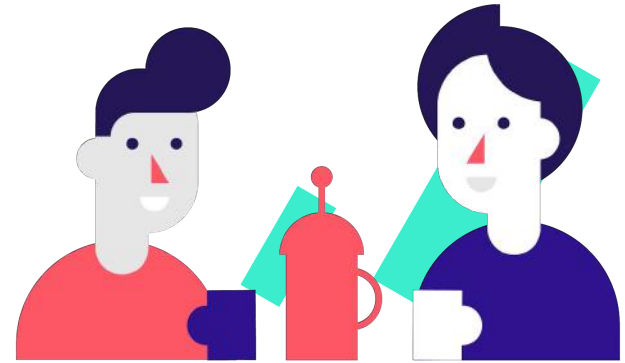


Key findings

Stakeholders

Here's a summary from the six stakeholders interviewed, across three councils


- Planning makes up a small proportion of total calls (Oxford 3.7%, Hertsmere 6.5%, Cheltenham 6.7%)
Of these, stakeholders estimate 80-90% can't be resolved by a first-line telephone agent.
- Paperlessness: the ability to query an application digitally is a prerequisite for meaningful AI
- Customers are frequently calling to check on the status of an application.
Aspiration towards an "Ocado" solution of proactive status updates
- Areas where AI could potentially add value:
 - Triaging first-line calls (albeit low volume)
 - AI-driven proactive notifications by SMS giving status updates



Stakeholder quotes

“One of the problems in Planning is that no two answers are the same. There’s no one answer fits all. There are so many variables. Interpretation is something that I don’t think you can take the human out of.”

“I’m still surprised by the volume of calls. All of the stuff is on the website, but they just want to speak to a human.”

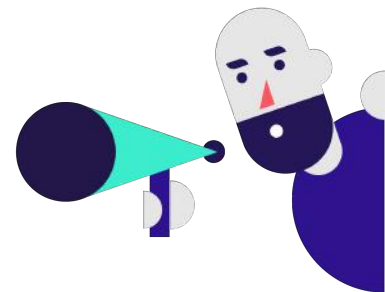
In the bottom right corner, there are several overlapping red geometric shapes, including a large triangle and several smaller rectangles and trapezoids, creating a modern, abstract design element.

Key findings

Councils

Here's a summary of the councils' experience this past week

- What were your key findings?
- Lessons learned
- What you're still not sure about



What's next?

Open floor

- **What's next?** Waste and recycling: Torchbox at Derbyshire while Bolsover, Rotherham, and Doncaster research
- **User interview analysis deadlines:** all information should reach us no later than **Thursday** each week.
- **How is recruitment going?**
- **Any questions?**

Torchbox

The logo for Torchbox features the word "Torchbox" in a bold, white, sans-serif font. A red flame icon is positioned above the final 'x' of the word.