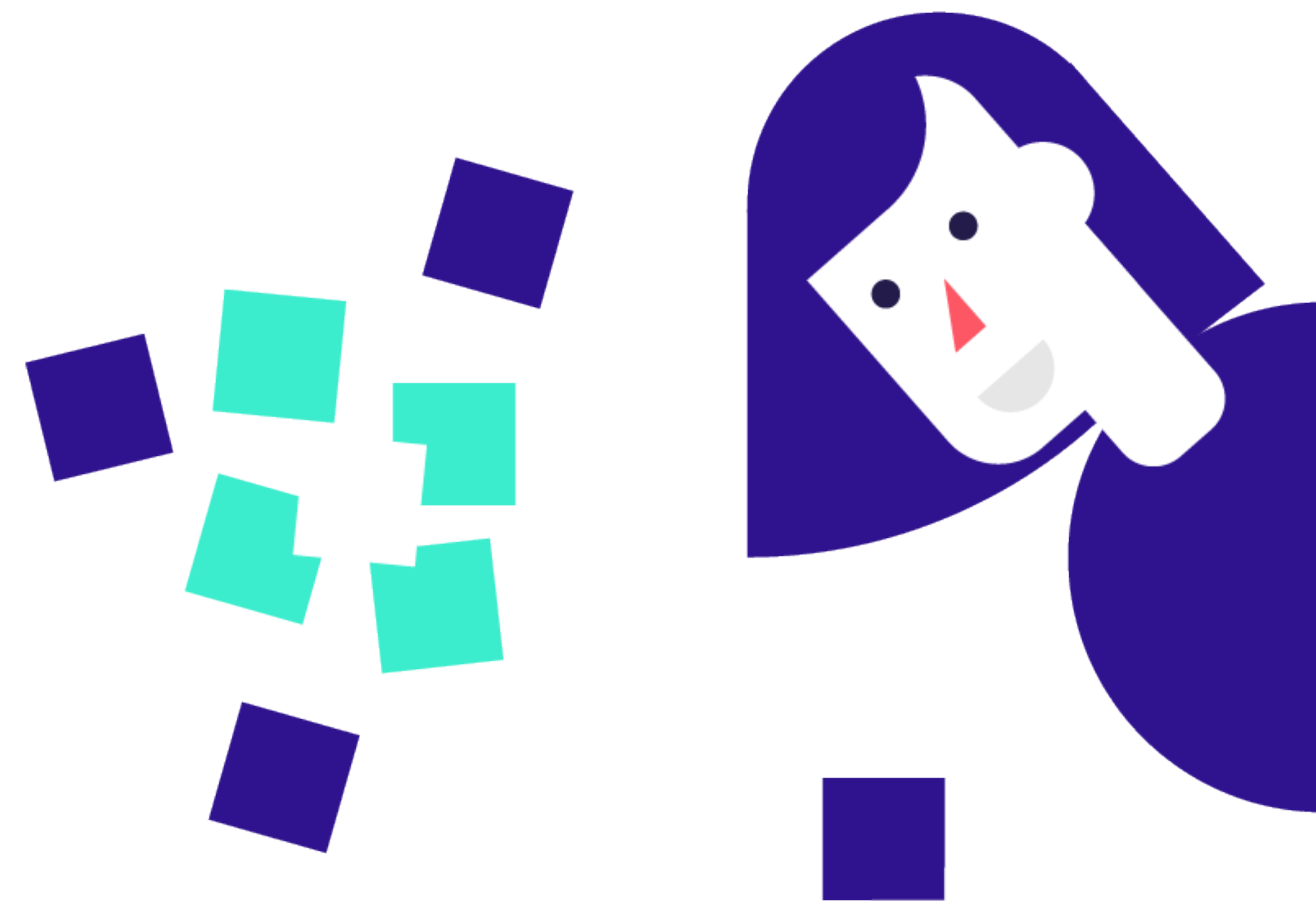


User Research Training

March 2019

Torchbox 



Housekeeping

- › Slides will be shared at the end
- › Please put your phones away
- › Toilets and fire exits
- › Ask questions throughout



Contents

- Introduction to the Chatbot project
- Introduction to user research
- User interviews
 - Prepare and recruit
 - Conduct interview and capture data
 - Analyse and synthesise
- User Interview - practice run!

Chatbot Project

What are we aiming to achieve?

Project aims

- To run a technical and user needs investigation.
- To develop a framework and robust business case for local councils to evaluate the potential value and relevance of chatbot applications for their services.



Our deliverables

- To work with local councils to deliver user research, providing an appropriate framework to collect and document findings.
- To supply onboarding and training to staff supporting research efforts along with discussion guides and templates for capturing insights.
- Use knowledge sharing sessions to reflect on processes and findings.



Foundations

18/02/2019	25/02/2019	04/03/2019
Kick off	Prep	Training

Research

11/03/2019	18/03/2019	25/03/2019	01/04/2019
Planning Oxford	Waste & Recycling NE Derbyshire & Bolsover	Revenues & Benefits Redditch & Bromsgrove	Highways Surrey

Synthesis

08/04/2019	15/04/2019
Reporting	Final Report

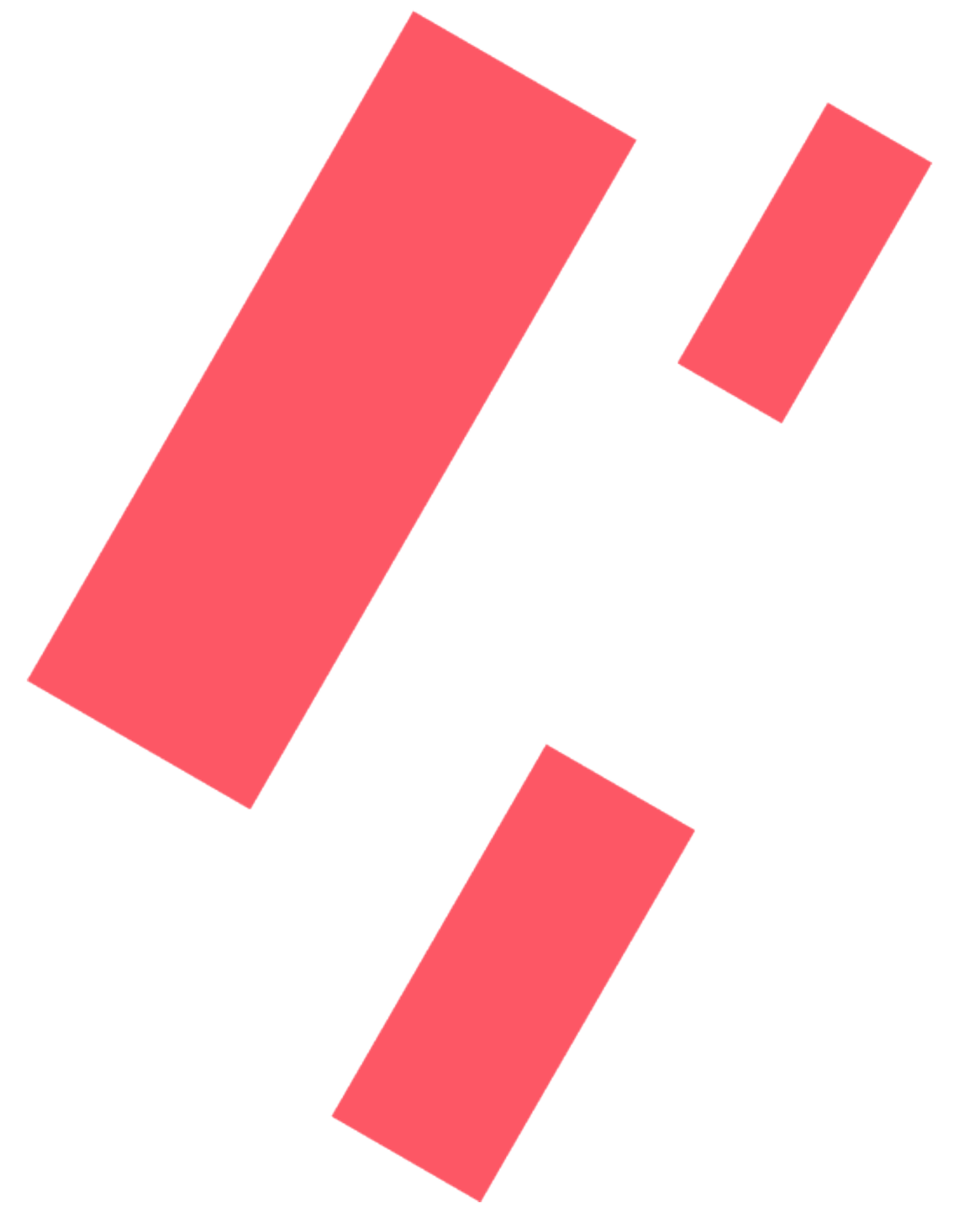
Final sharing session:

18th April



Project Hopes

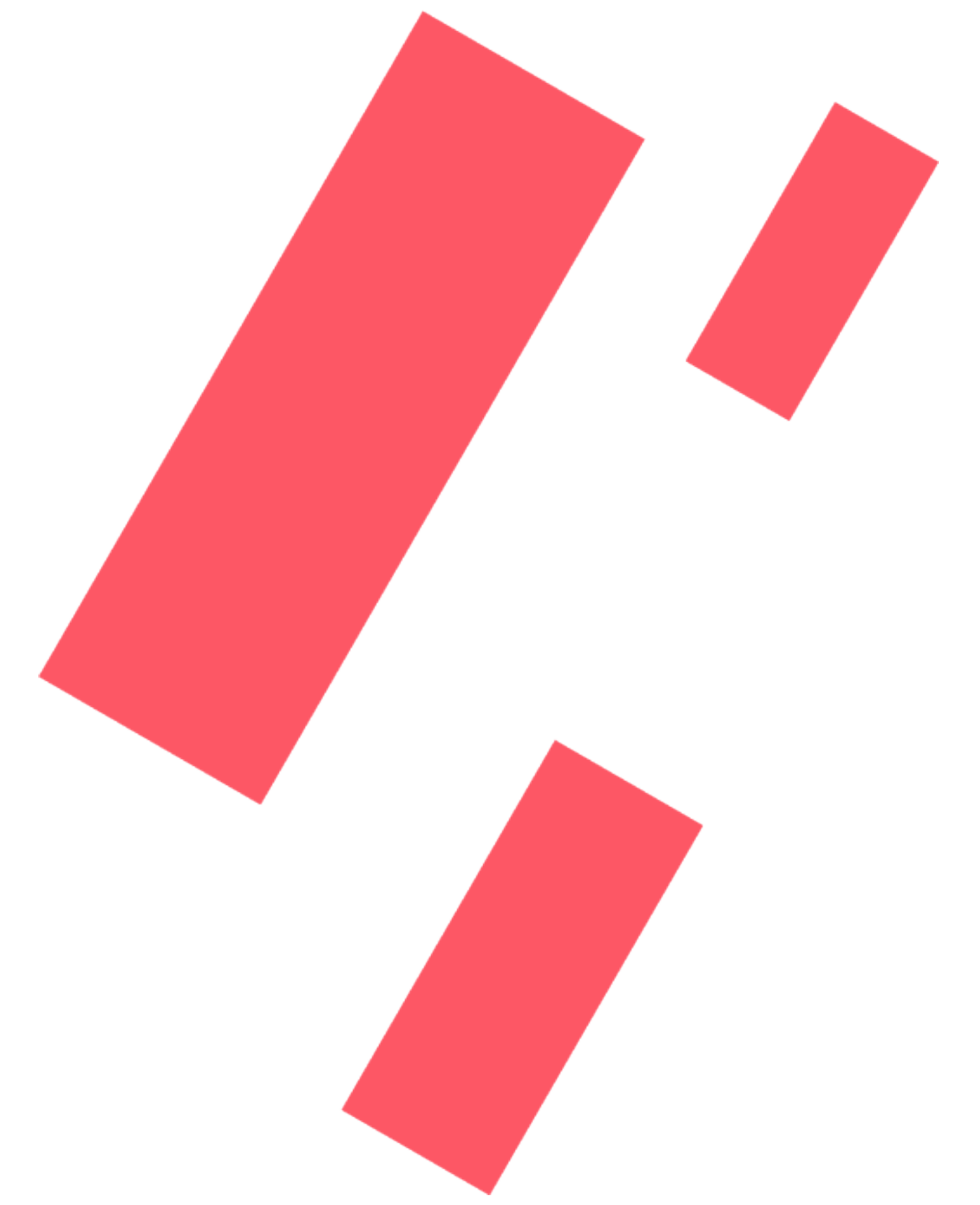
- Work together collaboratively
- Learn lessons
- Make connections and form great partnerships
- Deliver something worthwhile
- Take away some personal learning
- Develop new skills



User Research

An introduction to user research, methods and useful resources.

Learning about users and their needs



“When designing a government service, always start by learning about the people who will use it. If you don’t understand who they are or what they need from your service, you can’t build the right thing.”

BETA Complete our quick 5-question survey to [help us improve our content](#).

[Service manual](#) > User research

User research

Understand user needs: plan research, prepare for sessions, share and analyse findings.

[Open all](#)

Understanding user research

Introduction, user needs, users who need help online.



User research in the different design phases

Discovery, alpha, beta, live.



Preparing for user research

Planning, participants, locations, recruitment.



User research methods

Common methods and techniques.



Analysing and sharing findings

Doing analysis, sharing what you've learned.




Join the community

Find out what the cross-government community does and how to get involved.

[User research community](#)

[Accessibility community](#)

Get notifications

When any guidance within this topic is updated  [email](#)

How to research



You can learn about users and their needs by:

- Reviewing existing evidence
- Interviewing and observing actual or likely users
- Talking to people inside and outside your organisation who work with actual or likely users



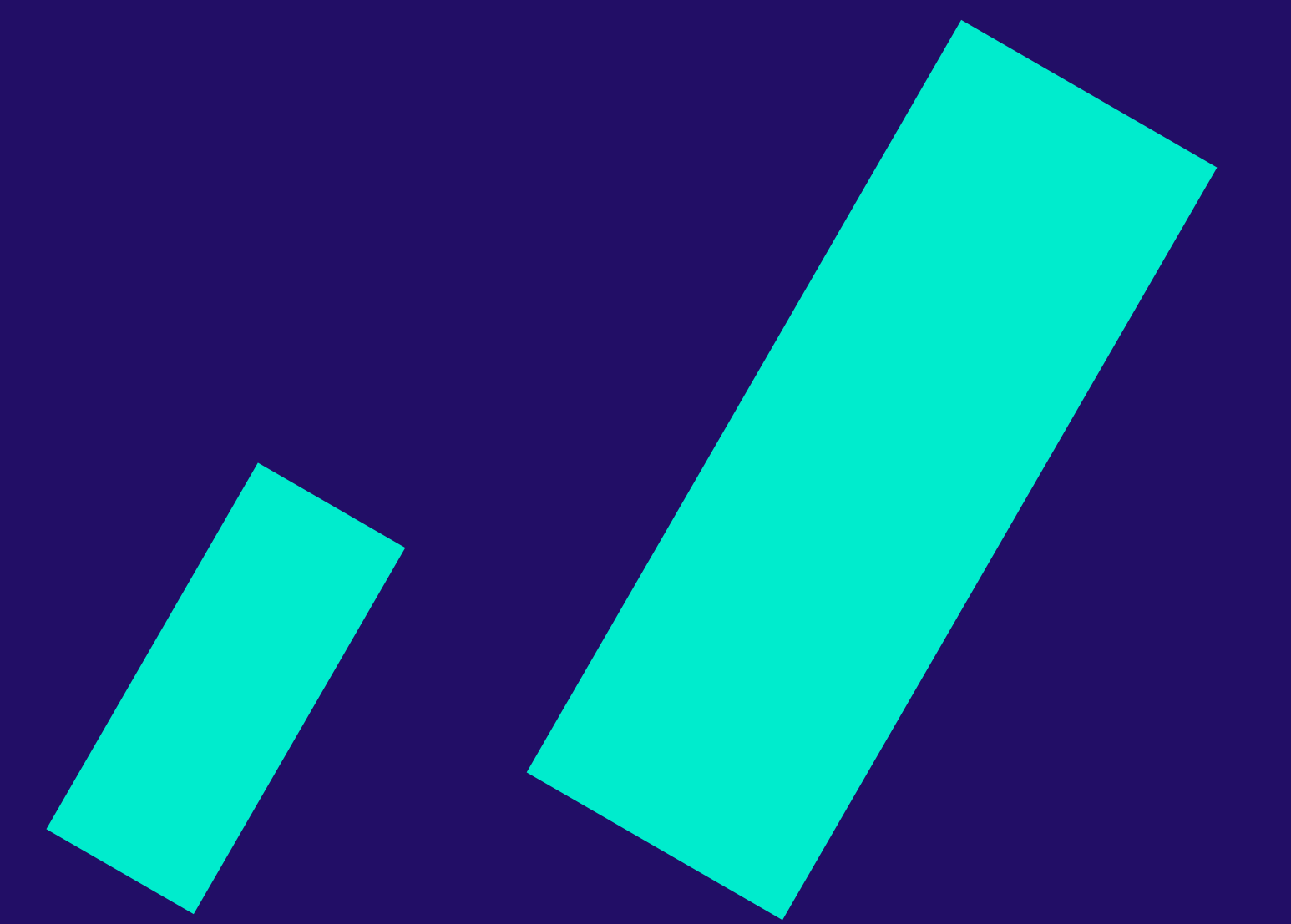
Government
Digital Service

Angela Collins-Rees

User Research Specialist
Government Digital Service



Treat any opinions or suggestions that don't come from users as assumptions that have to be proven by doing research.



USER RESEARCH

An introduction

UNDERSTAND YOUR USERS

You need to understand:

- ▶ who your likely users are
- ▶ what they're trying to do
- ▶ how they're trying to do it now
- ▶ how their life or work influences what they do and how
- ▶ how they use and experience existing services

FIND WHAT WORKS

People rely on government services to do important things. If they can't do them, it can cause significant problems.

In turn, these problems can increase government costs and stop policies achieving their intent. This means your user research must focus on how the people who need your service can use it to get the right outcome for them, rather than what they like or prefer.

BE INCLUSIVE

A good service is inclusive of users of all abilities. It is important that you don't exclude any users in the way you conduct your research - consider this when planning, recruiting and choosing research locations.

People with disabilities might struggle to access or use parts of your service - understanding this is critical to developing inclusive services.

USER RESEARCH

Culture

CONTINUOUS RESEARCH

Peoples needs and expectations change over time.

To make sure you are providing a relevant and valuable service - it is important to conduct research continuously.

Opt for small batches, often - rather than large programmes, rarely. You will:

- ▶ Save time by focusing on what people need
- ▶ Reduce risk by learning and responding quickly

MAKE IT A TEAM SPORT

User research is most effective when user researchers are embedded in service teams, and team members are actively involved in user research activities. Doing this will help you:

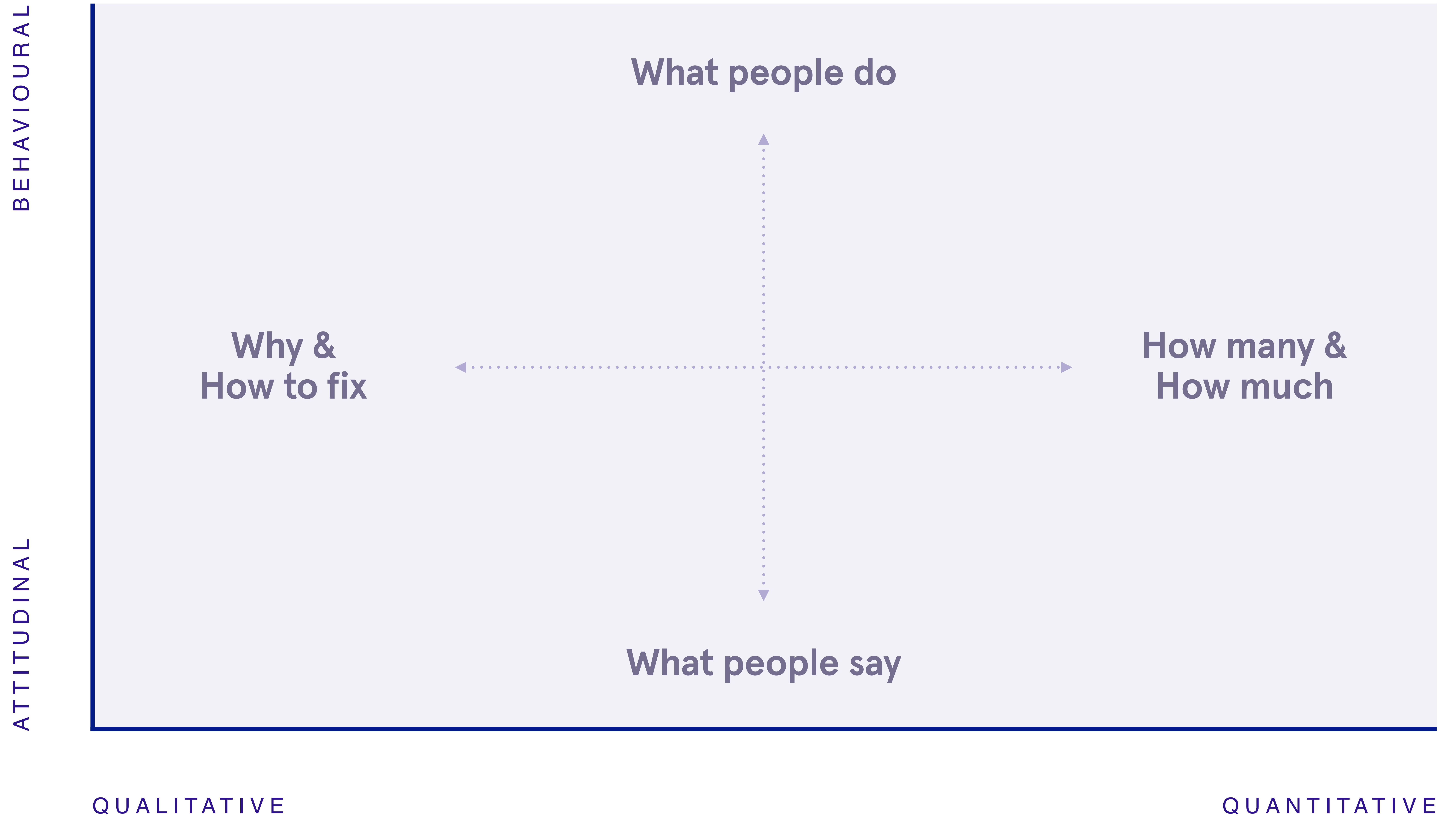
- ▶ Understand the highs and lows that people experience when using your service
- ▶ Think and talk about users in terms of real people with real needs to develop empathy for the people they're writing or designing for

SHARE YOUR FINDINGS

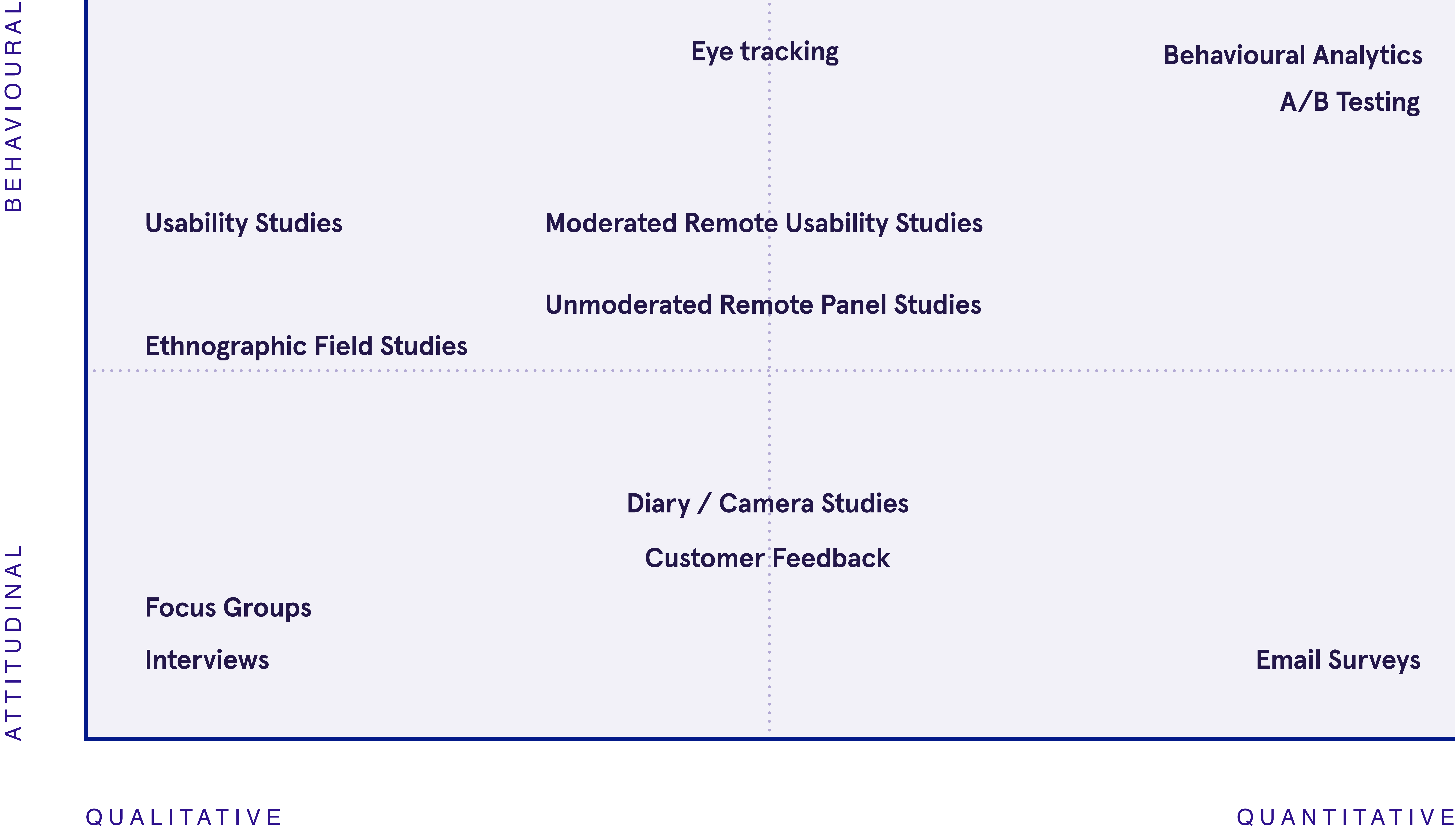
You should invite your wider team to show and tells. Involving more people in user research helps your team make better decisions about how to improve your service by:

- ▶ Reducing the risk of bias and unchallenged assumptions
- ▶ Giving less dominant team members a voice
- ▶ Limiting the influence of individual stakeholders

User Research Methods



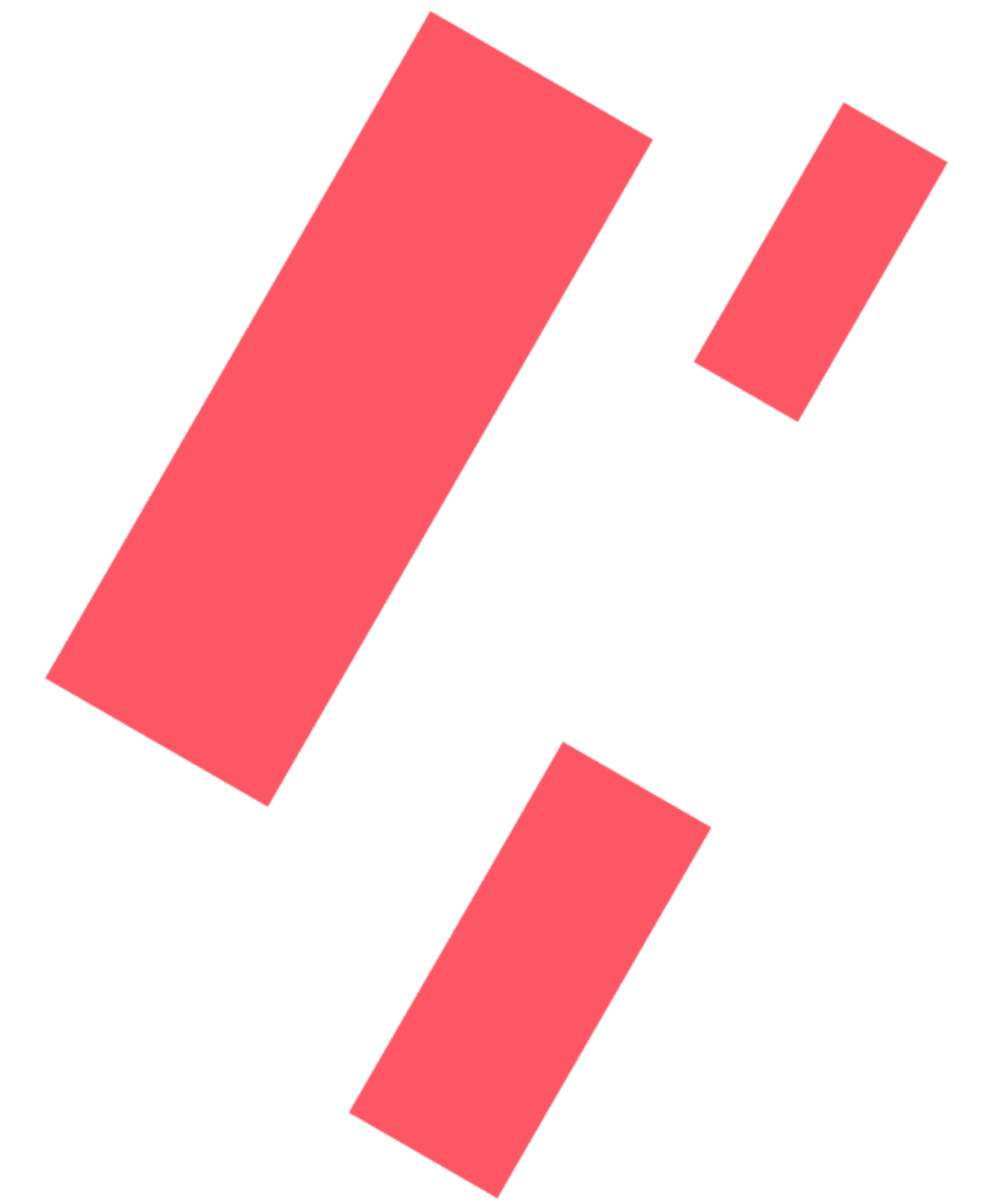
User Research Methods



User Research Methods

DISCOVER	EXPLORE	TEST	LISTEN
<ul style="list-style-type: none">➤ Field study➤ Diary study➤ User interview➤ Stakeholder interview➤ Requirements & constraints gathering	<ul style="list-style-type: none">➤ Competitive analysis➤ Persona building➤ Task analysis➤ Journey mapping➤ Prototype feedback & testing (clickable or paper prototypes)➤ Write user stories➤ Card sorting	<ul style="list-style-type: none">➤ Qualitative usability testing (in-person or remote)➤ Benchmark testing➤ Accessibility evaluation	<ul style="list-style-type: none">➤ Survey➤ Analytics review➤ Search-log analysis➤ Usability-bug review➤ Frequently-asked-questions (FAQ) review

Blending your methods



You get the most value out of your user research by comparing or relating findings from both quantitative and qualitative research methods.

Ex: Google Analytics + User Interviews

How do your users talk?

Home

The New York Times

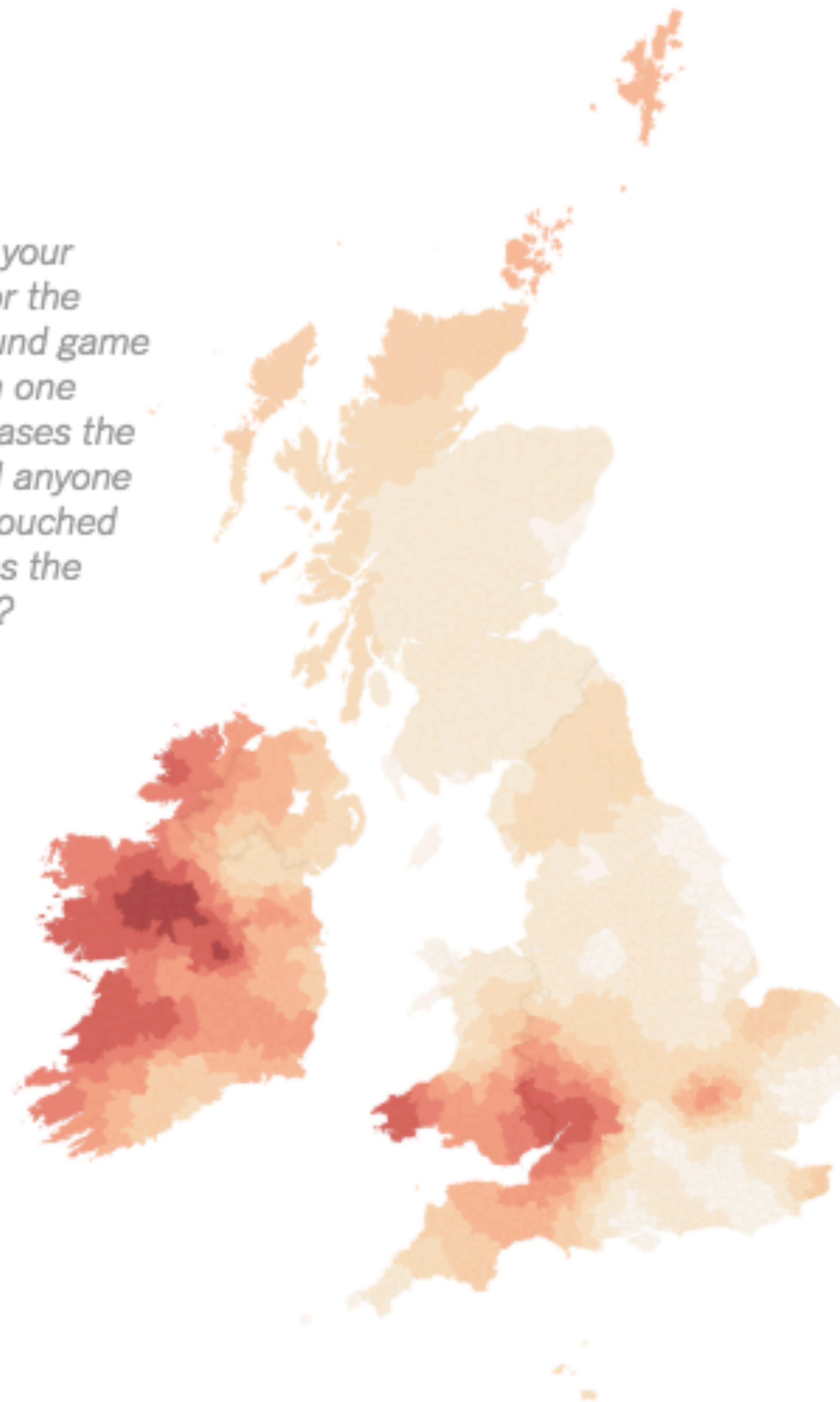
THE UPSHOT

Share

30

What is your
name for the
playground game
in which one
child chases the
rest and anyone
who is touched
becomes the
pursuer?

"Tag"



The British-Irish Dialect Quiz

By JOSH KATZ FEB. 15, 2019

For each question, choose whichever answer comes
closest to how you talk casually with friends.

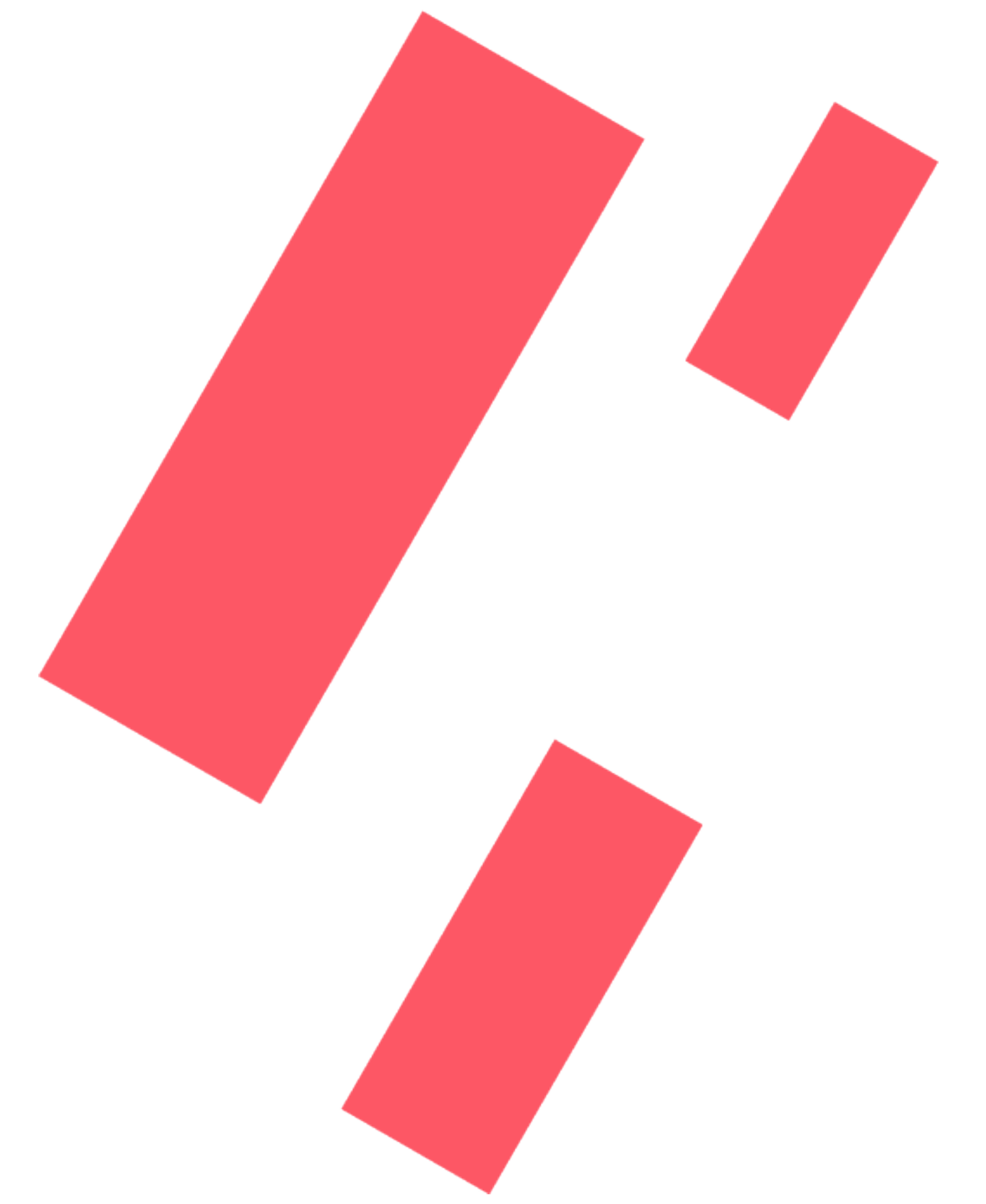


User Interviews

Local Councils

Conducting user interviews in your local councils. For this project, we are focussing on four research themes: Planning, Waste & Recycling, Revenues & Benefits and Highways.

Research aims



- To understand the user experience of customer support in each research area (motivations, triggers, frequency, success and pain points)
- Mental models and terminology used during communication, search and navigation
- User experience of, and attitude towards, digital channels and technology (ex: social, channels, chatbots)
- **For this project:** How to help customers avoid calling councils unnecessarily through the use of chatbots and AI?

User interviews:

1

PREPARE &
RECRUIT

2

CONDUCT &
CAPTURE
DATA

3

ANALYSE &
SYNTHESISE



Research

11/03/2019	18/03/2019	25/03/2019	01/04/2019
Planning Oxford	Waste & Recycling NE Derbyshire & Bolsover	Revenues & Benefits Redditch & Bromsgrove	Highways Surrey

Councils doing their own user research:

- Hertsmere

➤ Cheltenham
- Rotherham

➤ Doncaster
- Preston

➤ Adur & Worthing



Our approach to each research week

	1	2	3	4	5
	Monday	Tuesday	Wednesday	Thursday	Friday
Torchbox	Interviews & Analysis	Interviews & Analysis		Analysis & Synthesis	Reporting & Demo
Council	Interviews & Analysis	Interviews & Analysis	Analysis	Analysis & Synthesis	Demo





PREPARE &
RECRUIT



- Plan timescales
- Choose locations
- Write a recruitment brief
- Find and recruit participants
- Schedule interviews with participants
- Write a user interview script

➤ **Plan timescales**

THINK ABOUT YOUR END TO END
PROCESS

➤ Choose locations

WHAT ARE YOUR DEPENDENCIES?

➤ Write a recruitment brief

IS THIS FEEDING INTO A WIDER
PROGRAMME OF WORK?

➤ Find and recruit participants

BE REALISTIC ABOUT HOW MUCH
YOU CAN DO WITHIN A SET
TIMEFRAME

➤ Schedule interviews with participants

FACTOR IN CONTINGENCY TIME
FOR UNEXPECTED EVENTS

➤ Write a user interview script

➤ Plan timescales

ARE THE INTERVIEWS REMOTE?

➤ **Choose locations**

ARE THEY IN A PHYSICAL
LOCATION?

➤ Write a recruitment brief

WILL THIS AFFECT WHO CAN
PARTICIPATE?

➤ Find and recruit participants

DOES THE LOCATION HAVE
DISABLED ACCESS?

➤ Schedule interviews with participants

➤ Write a user interview script

- Plan timescales
- Choose locations
- **Write a recruitment brief**
- Find and recruit participants
- Schedule interviews with participants
- Write a user interview script

WHO ARE YOUR USERS?

BE INCLUSIVE - BUT THERE IS A RISK OF TRYING TO BE ALL THINGS TO ALL PEOPLE.

WHAT IS THE INTENTION OF THE RESEARCH?

WHAT ARE THE REQUIREMENTS FOR THE PARTICIPANTS?

WHAT IS THE INCENTIVE?

- Plan timescales
- Choose locations
- Write a recruitment brief
- **Find and recruit participants**
- Schedule interviews with participants
- Write a user interview script

WHAT CHANNELS DO YOU HAVE AT YOUR DISPOSAL?

HOW WILL THIS AFFECT WHO YOU REACH?

HOW WILL THIS AFFECT THE RECRUITMENT MESSAGE AND FORMAT YOU CAN SHARE?

WHO WILL BE RESPONSIBLE FOR FOLLOW UP COMMS WITH PARTICIPANTS?

HOW WILL YOU SHORTLIST RELEVANT PARTICIPANTS?

HOW MANY PEOPLE WILL YOU INTERVIEW? (5 MIN)

HOW WILL AVAILABLE TIMINGS AFFECT WHO I AM RECRUITING?

➤ Plan timescales

ARE YOU DOING THIS
MANUALLY?

➤ Choose locations

ARE YOU USING SOFTWARE?

➤ Write a recruitment brief

DO YOU HAVE ENOUGH TIME TO
CONDUCT THE INTERVIEW?

➤ Find and recruit participants

ARE YOU FACTORING ENOUGH
TIME FOR BREAKS / LUNCH?

➤ **Schedule interviews with participants**

WHAT IF THEY CANT DO DAYTIME
INTERVIEWS?

➤ Write a user interview script

https://demo.youcanbook.me

you can book.me

Click on any time to make a booking.

WED

15/03/17

08:00

09:00

10:00

11:00

12:00

THU

16/03/17

08:00

09:00

10:00

11:00

12:00

FRI

17/03/17

08:00

09:00

10:00

11:00

12:00

SAT

18/03/17

08:00

09:00

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SUN

19/03/17

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15:00

TUE

21/03/17

08:00

09:00

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12:00

13:00

14:00

15:00



- Plan timescales
- Choose locations
- Write a recruitment brief
- Find and recruit participants
- Schedule interviews with participants
- **Write a user interview script**

INCLUDE AN INTRODUCTION

IS IT A STRUCTURED INTERVIEW
OR A DISCUSSION GUIDE?

HAVE YOU GOT A LIST OF
TOPICS YOU WANT TO COVER?

DO YOUR QUESTIONS HAVE
PURPOSE?

TEST YOUR SCRIPT ON A
COLLEAGUE

You will get:

- Recruitment guide for this project
- User interview script





CONDUCT &
CAPTURE
DATA



- Run through introduction
- Get participant consent
- Record session
- One person leads interview
- One person takes notes

IS YOUR OFFICE / RECEPTION
AWARE THAT PEOPLE ARE
COMING IN FOR INTERVIEWS?

IS THERE A WAITING AREA?

STICK TO YOUR SCHEDULE.

➤ **Run through introduction**

➤ Get participant consent

➤ Record session

➤ One person leads interview

➤ One person takes notes

BUILD RAPPORT WITH THE PARTICIPANT.

HAVE YOU CLARIFIED THE PURPOSE OF THE INTERVIEW?

DO PARTICIPANTS KNOW THEY CAN STOP OR TAKE A BREAK AT ANY TIME?

➤ Run through introduction

➤ **Get participant consent**

➤ Record session

➤ One person leads interview

➤ One person takes notes

HAVE YOU GOT A CONSENT FORM?

HAS THE PARTICIPANT HAD A CHANCE TO ASK QUESTIONS BEFORE BEGINNING?

ARE YOU FOLLOWING GDPR GUIDELINES?

Consent form

I _____ voluntarily agree to participate in this research study.

I understand that even if I agree to participate now, I can withdraw at any time or refuse to answer any question without any consequences of any kind.

I understand that I can withdraw permission to use data from my interview within two weeks after the interview, in which case the material will be deleted.

I have had the purpose and nature of the study explained to me in writing and I have had the opportunity to ask questions about the study.

I understand that participation involves an hour of my time in return for a £60 voucher.

I understand that my email address or home address will be used for the sole purpose of sending my £60 voucher.

I agree with my interview being audio-recorded.

I understand that all the information I provide will be treated confidentially.

I understand that in any report on the results of this research my identity will remain anonymous.

This will be done by changing my name and disguising any details of my interview which may reveal my identity or the identity of people I speak about.

I understand that disguised extracts from my interview may be quoted in published documents and online blogs.

I understand that scans of signed consent forms, original audio recordings and the transcript of my interview in which all identifying information has been removed will be digitally retained until the end of this project on May 1st 2019.

I understand that under freedom of information legislation I am entitled to access the information I have provided at any time while it is in storage as specified above.

I understand that I am free to contact any of the people involved in the research to seek further clarification and information.

Signature of research participant _____ Date _____

➤ Run through introduction

➤ Get participant consent

➤ **Record session**

➤ One person leads interview

➤ One person takes notes

PEOPLE CAN TALK A LOT
QUICKER THAN WE CAN TYPE.

HAVE YOU GOT AN AUDIO
RECORDER?

- Run through introduction
- Get participant consent
- Record session
- One person leads interview
- One person takes notes

FOLLOW THE SCRIPT / DISCUSSION GUIDE

Interview Script

Context

Let's start off by learning a

Could you please tell me h

Could you describe your h

What do you do for a living

Would you say you have pl
not related to work?

Would you say you have ti

Motivations

Imagine we are here to make a documentary about your experience with customer service for your local (research theme) services. We will ask you questions to help us identify the key scenes in y scenes to life. We might as understand things from you

When was the last time(s) theme)?

Was this a one-off or is thi

If regular; how often? Is th

If a one-off; what triggere remember when you had t

What were you hoping to i

Why was this important to

Was there time pressure? I time?

If you could not complete

Experience of service

How long was it between that trigger moment and actually accessing the service?

How did you access your council's (research theme) service? (phone, website, in person, other...?) What did you look for?

Let's talk through your experience, step by step. What did you do first?

For each of the key steps or stages in the customers' experience, use the following questions:

How long did this take? How long between this and the next step?

At this point, what adjective would you use to describe your experience?

How were you interacting with your council? (phone, website, in person, other...?)

When did you do this (time of day, week, month)? How long did this take?

Pain points:

Did you experience any inconvenience or frustration at this point? Big or small?

- Run through introduction
- Get participant consent
- Record session
- **One person leads interview**
- One person takes notes

FOLLOW THE SCRIPT /
DISCUSSION GUIDE

PAY ATTENTION

OPEN QUESTIONS GET BETTER
ANSWERS - LOOK FOR ROOT
CAUSES AND MOTIVATIONS

FOLLOW UP QUESTIONS FOR
MORE DETAIL

FOCUS ON REAL EXPERIENCES

GOING OFF TOPIC CAN LEAD TO
INTERESTING INSIGHT - BUT
KNOW HOW TO REIGN IT BACK

KEEP AN EYE ON THE TIME

LET THE PARTICIPANT DO THE
TALKING

PARAPHRASE KEY POINTS BACK
TO CONFIRM YOU HAVE
UNDERSTOOD

- Run through introduction
- Get participant consent
- Record session
- One person leads interview
- **One person takes notes**

WHERE ARE YOU CAPTURING
YOUR NOTES?

Context

Age

Occupation

Household

Customer Experience Map

Step 1

Step 2

Step 3

Step 4

Step 5

Actions
(Info - Task - Complex)

Channel(s)

Motivations

Last time accessed service

One off / regular?

Initial trigger?

Hoping to do / achieve

Enable to / desired outcome

Time pressure?

Impact if not complete

Customer Language / Terminology

Attitudes to Technology

Preferred way to contact others:

Preferred way for others to contact them:

Which one sounds more valuable to you:

Option A

Option B

Waiting a few hours to have in-depth chat with customer support

Being able to get high level information and support 24/7

Being able to contact someone to get the help you need

Being able to self-help with available resources

The ability to text and online chat with customer services

The ability to call and speak to customer services

How regularly do use the Internet?

Never

Sometimes

Regularly

Always

Home

Work

On the go

How regularly do use the Internet for these purposes?

Never

Sometimes

Regularly

Always

To communicate with people

To find information

For shopping

To consume media

For personal admin

How strongly do you agree or disagree with the following statements?

Strongly disagree

Disagree

Agree

Strongly agree

I enjoy using technology

Technology intimidates and threatens me

I am eager to try new technology

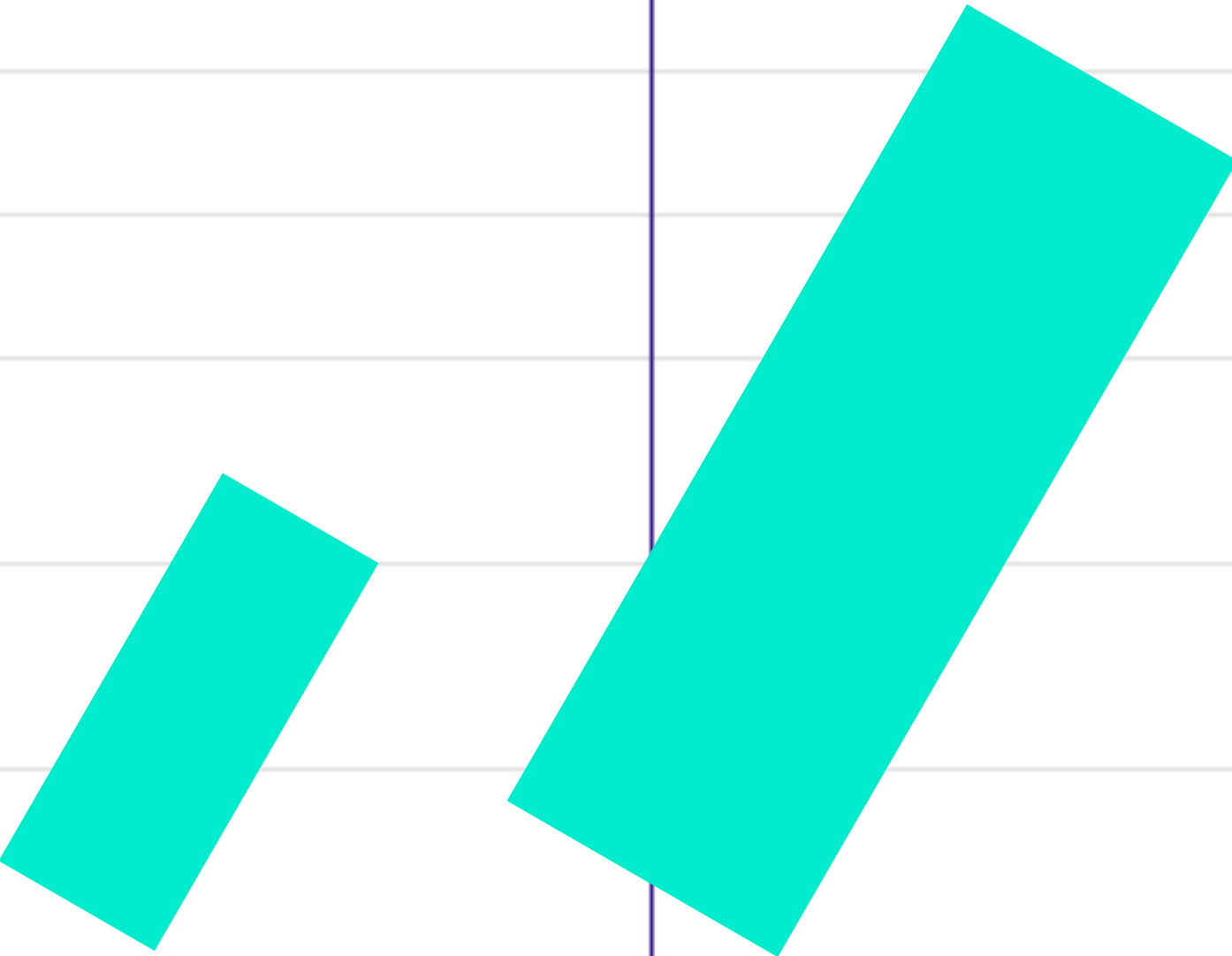
I avoid using technology when I can

Without my smartphone, I would struggle to get personal admin done

Without my laptop or desktop, I would struggle to get personal admin done

I prefer speaking to a human, I hate texting / emailing

I prefer having paper copies of everything, I hate digital documents



- Run through introduction
- Get participant consent
- Record session
- One person leads interview
- **One person takes notes**

WHERE ARE YOU CAPTURING
YOUR NOTES?

ARE YOU FAMILIAR WITH THE
SCRIPT?

PAY ATTENTION!

YOU CAN ALSO ASK QUESTIONS.

REMEMBER: YOU CAN ALWAYS
REFER BACK TO THE AUDIO.

You will get:

- User interview script
- Data capture spreadsheet





ANALYSE &
SYNTHESISE



- Extract observations
- Sort and group observations
- Determine findings and learnings
- Visualise and share findings

- **Extract observations**
- Sort and group observations
- Determine findings and learnings
- Visualise and share findings

STRUCTURED FORMAT MAKES IT EASIER AND QUICKER TO EXTRACT OBSERVATIONS

WHERE ARE YOU CAPTURING YOUR OBSERVATIONS?

DIGITAL OR PHYSICAL?

DON'T LEAVE IT TOO LONG TO ANALYSE DATA - THE SOONER THE BETTER.

Customer Experience Map					
	Step 1	Step 2	Step 3	Step 4	Step 5
Actions (Info - Task - Complex)					
Channel(s)					
Time / duration					
Emotional: Positive					
Emotional: Neutral					
Emotional: Negative					
Requirements for progression					
Surprise / Delight					
Barriers / Frustrations					
Success / Job completion					
Opportunities for improvement					



- Extract observations
- **Sort and group observations**
- Determine findings and learnings
- Visualise and share findings

ARE YOU SPOTTING PATTERNS IN THE DATA?

ARE THERE THEMES EMERGING?

AVOID EARLY SOLUTIONISING

HAVE YOU GOT SPECIFIC OUTPUTS YOU HAVE TO DELIVER? -REVERSE ENGINEER-

SYNTHESISING MOTIVATIONS AND DESIRED OUTCOMES INTO USER STORIES

User Stories



Once you have a good understanding of your users' needs, you should write them down and add them to your descriptions of users.

User needs are usually written in the format:

As a... [which type of user has this need?]

I need/want/expect to... [what does the user want to do?]

So that... [why does the user want to do this?]

Once you have a good understanding of your users' needs, you should write them down and add them to your descriptions of users.

User needs are usually written in the format:

As a... [British person]

I need/want/expect to... [a passport]

So that... [I can travel abroad and prove my identity]

Good user needs should:

- Sound like something a real user might say
- Be based on evidence from user research, not assumptions
- Focus on the user's problem rather than possible solutions (for example, needing a reminder rather than needing an email or letter)

WHAT USERS WANT TO DO:

- Applying
- Appealing
- Paying for
- Submitting
- Sending a tax return
- Changing an address
- Claiming
- Requesting
- Challenging

AVOID USING:

- Understand
- Know
- Be aware of
- Using (as in a tool or service)

You should only use 'understand,' or 'be aware of' if the user needs to know it to fulfil a certain task.

GOOD EXAMPLE

As a... teacher

I want to... understand Amazing Policy affecting my students

So that... I fulfil my statutory obligations

BAD EXAMPLE

As a... teacher

I want to... understand Amazing Policy affecting my students

So that... I am informed

User Stories				
Stage 1	Stage 2	Stage 3	Stage 4	Stage 5
I want to	I want to	I want to	I want to	I want to
So I can	So I can	So I can	So I can	So I can
Acceptance Criteria:	Acceptance Criteria:	Acceptance Criteria:	Acceptance Criteria:	Acceptance Criteria:
I want to	I want to	I want to	I want to	I want to
So I can	So I can	So I can	So I can	So I can
Acceptance Criteria:	Acceptance Criteria:	Acceptance Criteria:	Acceptance Criteria:	Acceptance Criteria:
I want to	I want to	I want to	I want to	I want to
So I can	So I can	So I can	So I can	So I can
Acceptance Criteria:	Acceptance Criteria:	Acceptance Criteria:	Acceptance Criteria:	Acceptance Criteria:

ACCEPTANCE CRITERIA

- What is the definition of ‘done’?
- What tasks must be completed in order for the need to be met and desired outcome achieved?

- Extract observations
- Sort and group observations
- **Determine findings and learnings**
- Visualise and share findings

ARE THESE VALIDATING OR
CHALLENGING PREVIOUS
ASSUMPTIONS?

WHERE ARE YOU CAPTURING
YOUR LEARNINGS?

ARE YOU CROSS REFERENCING
WITH OTHER RESEARCH
METHODS?

IS THERE MORE SYNTHESIS
REQUIRED AT THE END OF THE
DISCOVERY PROGRAMME?

A core question for this project

- How to help customers avoid calling councils unnecessarily through the use of chatbots and AI?
- This requires a change in customer behaviour.



Forces that influence customer switch



- Extract observations
- Sort and group observations
- Determine findings and learnings
- **Visualise and share findings**

WHO WILL YOU SHARE YOUR FINDINGS WITH?




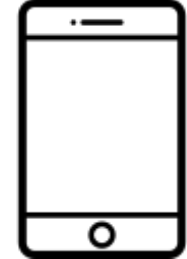




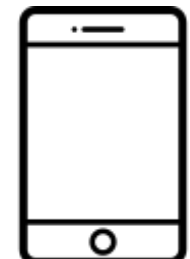
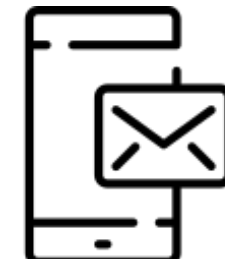





HOW WILL YOU SHARE YOUR FINDINGS?

VISUALISING YOUR FINDINGS MAKES IT EASIER FOR PEOPLE TO UNDERSTAND AND SHARE

DO YOU HAVE SPECIFIC OUTPUTS? WE ARE USING EXPERIENCE MAPS

Experience Map



	Research + Planning	Shopping	Booking	Pre-travel documents	Travel
User Needs	<p>I want to get inspired out about holiday destinations</p> <p>So I can decide where to go on holiday this year.</p>	<p>I want to narrow options</p> <p>So I can find the right holiday for me an day family.</p>	<p>I want to pay for the holiday</p> <p>So I can set this plan in stone and tell my family about it.</p>	<p>I want to have an up to date passport</p> <p>So I can travel safely and not get stuck abroad.</p>	<p>I want to know my flight times</p> <p>So I can get on the right plane and get to my holiday destination.</p>
Actions + Tasks	<ul style="list-style-type: none">› Google ‘holidays with beaches’› Start a Pinterest board.	<ul style="list-style-type: none">› Talk to travel advisors› Look at brochures with my family	<ul style="list-style-type: none">› Check credit card› Pay for holiday› Check confirmation emails	<ul style="list-style-type: none">› Submit request for passport renewal› Send out passports› Receive new passports	<ul style="list-style-type: none">› Go to the airport› Catch flight› Go to hotel upon arrival
Channels + Devices	<div> LAPTOP</div> <div> WEBSITE</div>	<div> CALL</div> <div> PHONE</div>	<div> WRITTEN</div> <div> POST</div>	<div> LAPTOP</div> <div> WEBSITE</div>	<div> PHONE</div> <div> EMAIL</div>
Emotional	<p>“When I google for holidays, there is just so much choice I freak out a bit”</p> <div></div>	<p>“When I google for holidays, there is just so much choice I freak out a bit and find I give up searching altogether”</p> <div></div>	<p>“I simply love booking on Airbnb”</p> <div></div>	<p>“It takes so long to sort out all the kids paperwork and documents”</p> <div></div>	<p>“It is stressful getting to the airport - we tend to run late so I want travel information at my fingertips”</p> <div></div>
Pain Points	<ul style="list-style-type: none">› Too many search results	<ul style="list-style-type: none">› My partner and I cant agree on the best holiday type	<ul style="list-style-type: none">› Making sure I can use my credit card	<ul style="list-style-type: none">› Getting information wrong and having to correct documents	<ul style="list-style-type: none">› Not enough hands - three children and luggage
Compelling forces	<ul style="list-style-type: none">› Habit of looking on Google› Don’t have time around work and house chores to research	<ul style="list-style-type: none">› Scared of not picking the best holiday for the family› Habit of talking to a travel advisor	<ul style="list-style-type: none">› Always pay with credit card› Scared of not getting insurance› Wife gets the final say	<ul style="list-style-type: none">› Scared of not having up to date documentation	<ul style="list-style-type: none">› Fixed flight time - strict deadline› No car, how to get to the airport

	Stage 1	Stage 2	Stage 3	Stage 4	Stage 5
User Needs	<div>I want to enter text here</div> <div>So I can enter text here</div>	<div>I want to enter text here</div> <div>So I can enter text here</div>	<div>I want to enter text here</div> <div>So I can enter text here</div>	<div>I want to enter text here</div> <div>So I can enter text here</div>	<div>I want to enter text here</div> <div>So I can enter text here</div>
Actions + Tasks	<div>Enter text here</div> <div>Enter text here</div> <div>Enter text here</div>	<div>Enter text here</div> <div>Enter text here</div> <div>Enter text here</div>	<div>Enter text here</div> <div>Enter text here</div> <div>Enter text here</div>	<div>Enter text here</div> <div>Enter text here</div> <div>Enter text here</div>	<div>Enter text here</div> <div>Enter text here</div> <div>Enter text here</div>
Channels + Devices	<div>USE ICONS PROVIDED</div> <div>DEVICECHANNEL</div>	<div>USE ICONS PROVIDED</div> <div>DEVICECHANNEL</div>	<div>USE ICONS PROVIDED</div> <div>DEVICECHANNEL</div>	<div>USE ICONS PROVIDED</div> <div>DEVICECHANNEL</div>	<div>USE ICONS PROVIDED</div> <div>DEVICECHANNEL</div>
Emotional	<div>“Enter quote here”</div> <div>USE ICONS PROVIDED</div>	<div>“Enter quote here”</div> <div>USE ICONS PROVIDED</div>	<div>“Enter quote here”</div> <div>USE ICONS PROVIDED</div>	<div>“Enter quote here”</div> <div>USE ICONS PROVIDED</div>	<div>“Enter quote here”</div> <div>USE ICONS PROVIDED</div>
Pain Points	<div>Enter text here</div> <div>Enter text here</div> <div>Enter text here</div>	<div>Enter text here</div> <div>Enter text here</div> <div>Enter text here</div>	<div>Enter text here</div> <div>Enter text here</div> <div>Enter text here</div>	<div>Enter text here</div> <div>Enter text here</div> <div>Enter text here</div>	<div>Enter text here</div> <div>Enter text here</div> <div>Enter text here</div>
Compelling forces	<div>Enter text here</div> <div>Enter text here</div> <div>Enter text here</div>	<div>Enter text here</div> <div>Enter text here</div> <div>Enter text here</div>	<div>Enter text here</div> <div>Enter text here</div> <div>Enter text here</div>	<div>Enter text here</div> <div>Enter text here</div> <div>Enter text here</div>	<div>Enter text here</div> <div>Enter text here</div> <div>Enter text here</div>

W H Y ?

Consolidating these into a single map will help you to understand:

- How users experience the current service
- How things work (or don't)
- Interdependencies – for example, between different departments or services
- Pain points and where things are broken

W H E N ?

Experience mapping works best for services that involve:

- Lots of separate steps or events
- More than one location – for example home, a departmental office, the post office
- Different people or teams
- Several related services or service touchpoints

You will get:

- Data analysis & User story spreadsheet
- Experience map slides



Next steps

A FOLDER FOR EACH COUNCIL

	Adur & Worthing
	Bolsover / NE Derbyshire
	Cheltenham
	Doncaster
	Hertsmere
	Oxford
	Preston
	Redditch / Bromsgrove
	Rotherham
	Surrey

TEMPLATES GROUPED BY RESEARCH ACTIVITY

	1. Interview Data Capture
	2. Data Analysis
	3. Data Synthesis

	Chatbot User Interview Data Capture.xlsx	
	Chatbots_ User interviews consent form.docx	
	Chatbots_ User interviews script.docx	
	Chatbot User Interview Data Analysis.xlsx	
	Chatbot Experience Map_template.key	
	Chatbot Experience Map_template.pptx	





Digital for good.