Appointed Representative Suite of Services Customer Profile Development Discussions
Sample Discussion Guide

Below are specific questions we would like to ask at our discussions:

- How do representatives identify themselves (firm, individual, etc.)? In other words, who are our users? How many firms use our services? How many individuals use our services? Also, we would like to identify terminology and labeling issues to ensure we are using language based on users' understanding, and to identify characteristics or groups that are currently unknown to SSA.

- How internet savvy are representatives? Do they do business online frequently? Would they like to do business with SSA online? If so, what would they like to be able to do? What type of information would reps expect to provide to do business with us online? We need to know this information to provide a better product to our representative users. We need to know what services they expect to have available online, and what information is reasonable to request in return for granting access to services.

- What is important to reps and their clients? When interacting with an SSA website, what is the most important feature they would require? What do they want (nice to have)? What do they need (must have)? Immediate access to program information, personal information, client information, or the ease of use of the online service? We would like to know if we are putting our efforts in the correct areas. We need to know if they expect access to be harder to get to their personal information, or getting to their information should be easy, but getting their clients information should be difficult. We don't want to make our website unnecessarily complex.

- How much importance do they place on the integrity and security of the information they provide to us, and the information we provide to them? Are they willing to sacrifice timeliness of processing for the safekeeping of their personal information? Would they trust a third-party vendor for authentication purposes?