

## **SBIC WEB User/Form Service Development Research Questions**

Recruiting Method: Telephone

### **Text for initial Contact from Analyst to SBIC WEB Users:**

The U.S. Small Business Administration (SBA) is working to replace the SBIC WEB. SBA recently contracted with Backstop Solutions Group to develop a new webform to replace SBIC WEB. SBIC WEB is the legacy data portal for the SBIC program. As a SBIC WEB end user, we believe you can provide valuable insight into what currently works well, and what should be improved. We would like to request your participation in this new webform development process.

If you are interested in contributing, please let us know your availability and your preferred contact method. Someone from Backstop Solutions will reach out to you. Your participation in the interview is voluntary; however, be aware that your feedback would be instrumental in SBA's effort to provide a new webform portal which is user friendly, and most importantly that it meets your needs as an SBIC representative.

### **Text for email invitation for SBIC WEB Users:**

The U.S. Small Business Administration (SBA) is dedicated to SBIC program process improvement and ensuring that its information system can effectively receive and distribute SBIC data as required by statute, regulation and program policy. SBA recently contracted Backstop Solutions to develop a new webform that will replace SBIC WEB, the legacy data portal for the SBIC program.

To develop this new webform, SBA needs to understand current experience and identify potential improvements from SBIC WEB-authorized users such as you. Of particular value to the development of the new webform is understanding user experience and needs while navigating, entering, editing, amending and transmitting data, as well as validating submissions.

We are contacting you because your SBA point of contact has identified you as a SBIC WEB user possibly willing to provide valuable user experience feedback and insight. We would be grateful for your time and willingness to do so. Participation is voluntary; however, be aware that your feedback would be instrumental in SBA'S effort to provide a new webform portal which is user friendly, and most importantly that it meets your needs as an SBIC representative.

Representatives from Backstop Solutions, along with your SBA analyst, will contact you directly to learn more about your SBIC WEB experience.

SBA (including its contractor) may not conduct this interview unless it is currently approved by the Office of Management and Budget. This interview is approved under approval number 3245-0398, which expires on 1/31/2021. The estimated time to complete the interview is one hour. If you have any questions or concerns about the estimated time or any other aspect of the interview, you may contact Director, Records Management Division, Small Business Administration, 409 Third Street, SW, Washington, DC 20416. or SBA's Desk Officer, Office of Management and Budget, New Executive Office Building, Washington DC 20503.

### **Text for telephone script for SBIC WEB Users:**

Hello, my name is \_\_\_\_\_ from Backstop Solutions. The U.S. Small Business Administration (SBA) has contracted with Backstop Solutions to improve user experience in the new webform which will replace SBIC WEB. We are particularly interested in site navigation and practicality, as well as any other areas of concern or possible improvement you may wish to discuss.

Thank you for your participation today. Our questions are targeted to SBIC WEB users like you. We are contacting you because you have been identified as a SBIC WEB user who may be willing to participate in this interview. This interview should not last more than 60 minutes.

Some of the questions that will be asked during this interview will be in regard to frequency of SBIC WEB use, others will focus on use and challenges navigating SBIC WEB forms and components, and the steps you take to meet SBIC program data requirements.

During the interview, I will provide you with an opportunity to discuss any additional observations or perspectives on SBIC WEB and your role, which will assist SBA in building the new webform.

Your cooperation would help SBA in its efforts to provide a new webform portal that meets the needs of the end users. If you are willing to proceed with this interview let's start with the interview questions:

### **SBIC WEB User/Form Service Development Research Questions**

#### **1. Intro: Tell me about yourself (3 mins)**

Probe around:

- How long have you been using SBA related systems?
- How long have you been an SBIC/Third Party Provider?

#### **2. Tasks (Approximately 30 mins available)**

- We will be asking the SBICs/Third Party Providers to complete the following tasks in a Backstop Form Service (a functional element of the SaaS service procured by SBA) prototype:
  - i. Creating a new Form 1031- Portfolio Financing Report (via our "Available forms")
  - ii. Finding a previously submitted Form 468 (Annual Financial Report), and amending it
  - iii. Finding the newly assigned Form 468
- Gather feedback on SBICs'/Third Party Providers' thoughts of Backstop Form Service – Is it intuitive?

#### **3. Tell me about the last time you used SBIC WEB (5 mins)**

Probe around:

- Why did you have to complete those tasks?

#### **4. Ask SBIC/Third Party Provider to share their SBIC-WEB screen and take us through typical tasks they do while using SBIC-WEB (10 mins)**

Probe around:

- What isn't working well and why (Pain points on SBIC-WEB today)?
- What does work well in SBIC-WEB today?
- What has your SBIC-WEB's support experience been like?
- How often do you use the features you showed us?

#### **5. Tell me about the last time you amended a form (if ever) (3 mins)**

- Why did you need to amend this form?
- Is this something that happens often?

- When you make these changes, do you keep track of which forms were amended versus not?
6. **What do you do after submitting the form? What happens next? (4 mins)**  
Probe around:
- What is your expectation with consumption of the data?
7. **If you were to change one thing in the information preparation, submission and verification process of SBIC-WEB today what would it be? (2 mins)**  
Probe around:
- Why they chose this one thing?