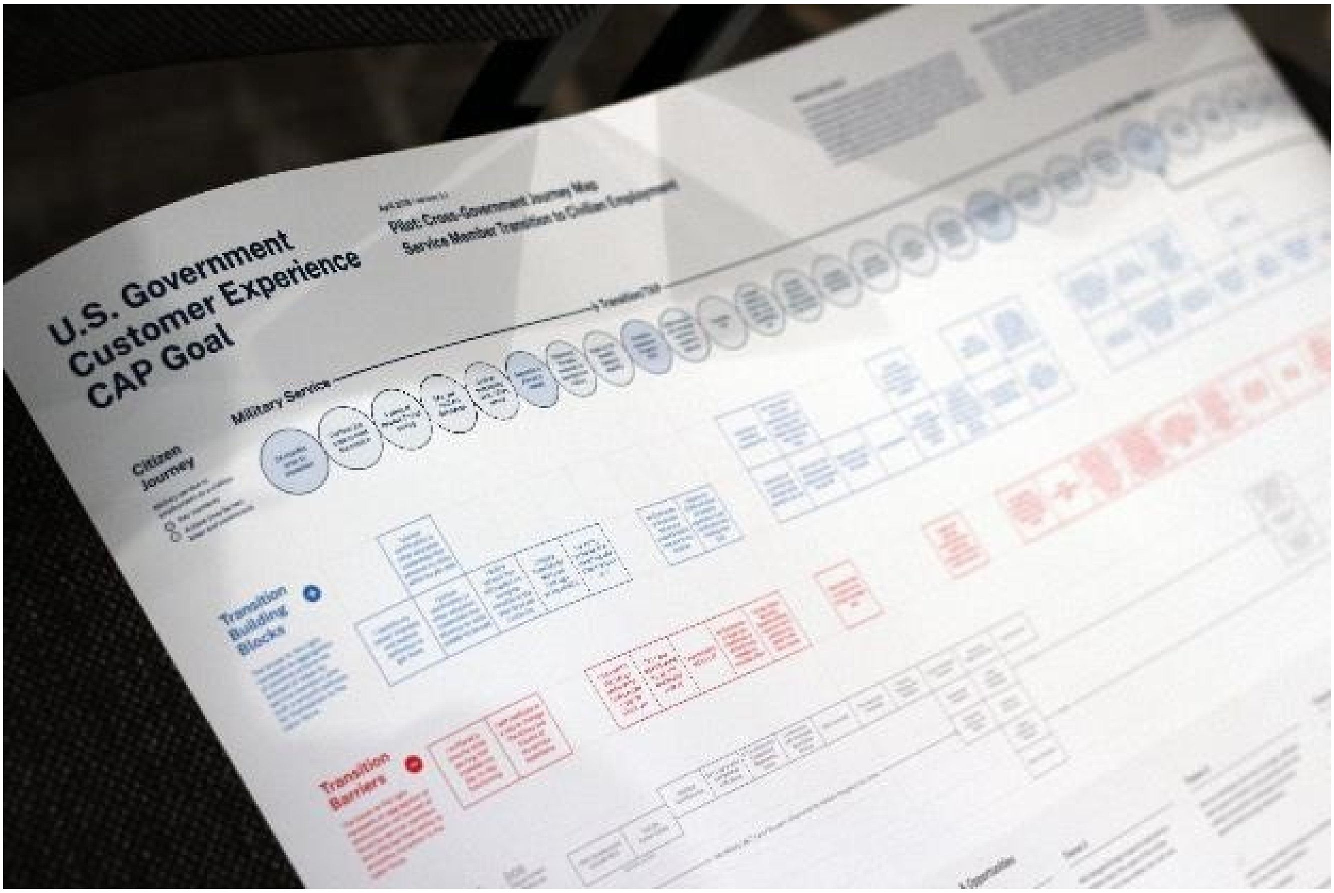
Deloitte.



CUSTOMER EXPERIENCE CROSS AGENCY PRIORITY GOAL: 2020 cross-agency journey mapping project

Research Field Guide

AUGUST 2020

Stakeholder Overview

Key Interviewees & Observations

Design Question

How can the Federal government better design its services by starting from the perspective of the customers the services are meant to serve?

Who can we ask?

Customers: Individuals that have navigated these services across:

Counties

Tribes

Socioeconomic Drivers

Demographics

Care Management Organizations: Organizations that provide medical, health, social and disaster recovery services to the public

Case Management Workers: Employees who provide services for people who are applying for or are enrolled in benefit programs

Local and State-Based Partners: Employees of local and state government programs that are often Federally funded and provide more direct interactions with customers navigating these services

What can we observe?

Enrollment Processes: Process steps, interactions between workers and members, emotions and thoughts while going through the process

Enrollment Location: Wait rooms, resources, signage, surroundings, types of people coming in-person

Geographic and Socioeconomic Features: Grocery stores, playgrounds, signage, public schools, health care services, neighborhood safety, housing stability, income level, access to resources

Interview Best Practices

The team will be objective and create a comfortable atmosphere for Interviewees.

BEST PRACTICES

- **Come prepared.** Bring professional IDs (Deloitte) and government-issued IDs (others) to prove your identity. It never hurts to have some business cards on hand to provide Interviewees.
- **Dress for success.** Dress in a manner that puts the Interviewees at ease, while maintaining professionalism. The HCD team typically dresses in business casual attire.
- **Find your buddy.** Field research should not be conducted alone; it's a buddy system. At a minimum, interviews require two HCD team members. Researchers must simultaneously observe the same subjects/Interviewees.
- **Establish your roles.** Be clear with your research partner on roles – one person should be the designated facilitator and one should be fully devoted to capturing notes. Additional folks in the room can be responsible for capturing photos, voice recordings, and/or videos.
- **Set the tone.** Spend a few minutes on small talk at the beginning to set the mood. The conversation should feel informal, open, and non-judgmental. Be aware of your body language. What tone are you setting?
    - Let Interviewees know upfront that responses are anonymous.
    - Explain that they have the right to opt-out at any part of the interview.
    - Assure Interviewees there's no right or wrong answer.
    - Ask permission to audio record Interviewees, and if not, write as close to verbatim as possible.
- **Think about framing.** Questions should be stated in an agnostic manner that shows no bias. Conduct interviews as conversations, not inquiries.
- **Maintain Interviewee integrity.** Notes on observations should be objective, devoid of speculation.
- **Set yourself up for success later.** Use the following tips to organize your notes:
    - Time stamp notes to the extent possible to easily navigate later.
    - Put a symbol next to key insights or quotes in field notes – capturing quotes can be a powerful tool during synthesis! Be sure you're capturing language (verbatim where possible) and tone.
    - Notes between researchers will not be shared until after debrief to avoid bias and group-think.
    - Track notes and demographic sheets to individual Interviewees using a number or symbol
- **Make room for silence.** Don't interrupt Interviewees and try to wait at least three seconds after they pause before speaking in response.
- **Close out the conversation.** Thank the Interviewee for his/her time and let them know any next steps. Be sure to collect their contact information if they're comfortable so they can be kept in the loop.
- **Reflect and debrief while fresh.** Always debrief individually (5-10 minutes), then debrief key insights as a group before moving onto the next conversation / observation.

EXAMPLE CUSTOMER INTERVIEW GUIDE – PROPRIETARY AND CONFIDENTIAL

In the Field

Flow and tips for interviewing and notetaking

INTERVIEW FLOW

FACILITATOR

- Brief introductions
- Small talk
- Overview of interview purpose
- Interview
- Thank them for their time

NOTE-TAKER

- Record audio
- Use a pen and paper to record all notes
- Record exactly what the Interviewee is saying
- Do not interrupt the facilitator, but join when invited at the end with follow- up questions

OBSERVER

- Use a pen and paper to record key quotes in the conversation
- Note any visible actions related to body language or attitude
- Listen attentively and only join when invited at the end with follow-up questions

ALL ROLES

- Debrief interviews (individual)
- Debrief interviews (team)
- Debrief and insights at the end of each day and site visit
- Develop Weekly Field Research Insights Brief for circulation to team leadership

DURING THE INTERVIEW

FACILITATOR

- The Interviewee is the expert
- Avoid leading questions
- Look for stories
- Use the Interviewee's own words
- Use silence strategically (wait 3 – 5 seconds after they've stopped talking)
- Make notes on things you want to follow-up on

NOTE-TAKER

- Use short-hand when possible (e.g., >,<,=, □, *)
- Do not synthesize on the fly
- Document the unstated, including body language and voice changes
- Keep track of questions that you gather
- Mark points in the conversation that seem important
- Time-Stamp notes with the time on the audio recording

OBSERVER

- Keep track of timestamps for key quotes
- Document responses to support the Note-Taker for lengthy or important responses
- Keep track of questions you gather for follow-up or key ideas for synthesis

USEFUL PHRASES

FACILITATOR

- "Walk me through your…"
- "Tell me more about…"
- "Tell me about a time when…"
- "Tell me about the last time you…"
- "Earlier, you said…"
- "Why?"
- "Please explain…"

NOTE-TAKER

(When invited by Facilitator)

- "Thank you for sharing…"
- "Earlier, you mentioned [X], can you tell me more about that?

OBSERVER

(When invited by Facilitator)

- Thank you for sharing…"
- "Earlier, you mentioned [X], can you tell me more about that?

AFTER THE INTERVIEW

- Debrief alone (5-10 mins) at first, cleaning notes, and highlighting key stories, soundbites, and initial insights
- Debrief internally (20-25 min) and note any interesting stories, quotes, and observations
- Summarize key takeaways
- Identify what's working, what's not – adjust your process accordingly
- Discuss internally additional focus areas for future interviews

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Interview Roles and Responsibilities

A general rule of thumb is to have two to three researchers in each one-on-one interview.

OVERVIEW

Aligning on role assignments and responsibilities before interviews is key to facilitating a seamless, Interviewee-centered ethnographic conversation.

PREFERRED OPTION

INTERVIEWEE

The Story Teller

The Interviewee will be the center of the conversation. True to ethnographic interviews, the Interviewee will primarily drive the dialogue, with the Facilitator guiding the conversation.

FACILITATOR

The Conversation Shepherd

The Facilitator will be the designated speaker and leader of the discussion. While other researchers will have the opportunity to ask follow-up questions at the end, the facilitator will be the primary leader of the conversation.

NOTE-TAKER & PHOTOGRAPHER

The Truth Teller

The Note-Taker will be fully-focused on capturing raw data points (including quotes and stories) from the discussion and photos, where applicable. All notes will be taken by hand and captured with the highest fidelity possible.

NOTE: The research team will be sensitive about taking photos during interviews.

CLIENT REPRESENTATIVE*

The Rapport Builder

The Representative will be responsible for building rapport and kicking off the discussion. The Representative will then introduce the Facilitator to lead the conversation.

**This team structure is used when possible and a Representative is available to assist the research team in rapport building as well as observing the interview.*

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Interview Structure

Interviews will be 45-60 minutes to capture rich stories about the assignment experience.

INTRODUCE THE TEAM (5 MIN)

Get Interviewee Comfortable (Facilitator) – Exchange names, shake hands, thank them for participating, spend a few minutes asking about how long they've lived in the area.

Explain Why We are Here (Facilitator) – Share that we are conducting a study on behalf of a Federal team to better understand the customer experience navigating either disability or disaster recovery services and benefits. Introduce yourself as the **Facilitator**.

SHARE MEETING OBJECTIVE (2 MIN)

Establish Credibility (Facilitator) – Explain that this effort is in support of a project with the program. *Introduction will be adjusted as necessary.*

Explain Roles (Facilitator) – Share that we will spend the majority of the next hour hearing from you, and I will ask some follow up questions along the way. Introduce the **Note- Taker** & **Observer**: My colleague(s) will be focused on taking notes and recording, if applicable, during the session. We hope to spend 60 minutes with you.

Describe Interview: We want to hear your candid, honest experiences. There are no right or wrong answers. This is unlike a typical interview. There is no set list of questions, so we'll be asking open-ended questions and going wherever the interview leads.

DOCUMENTATION DISCLAIMER (3 MIN)

Describe Documentation of the Interview (Facilitator) – Share that this conversation is voluntary and anonymous. This study involves notetaking, potentially taking a photo at the end, and using some of the quotes (anonymously) in our final report. Interviewees are assigned a code and quotes are not attributed. Please let us know if you have any questions.

UNPACK THE CUSTOMER EXPERIENCE (45-50 MINUTES)

Shepherd the Stories (Facilitator) – Dive into the conversation, using the questions listed on the following pages to guide facilitation.

THANK INTERVIEWEE AND CLOSE OUT (2 MIN)

Thank Interviewee – Thank you for participating. Is it ok if we contact you with any follow-up questions or clarifications? Provide your contact information and offer to take any follow up questions or insights. Share that the project will be published on performance.gov/cx

SAMPLE QUESTIONS / SCRIPT

Thank you for your consideration to connect with our team. We are supporting a cross-government Federal effort to better understand the journey of people like you, and how we might improve the way in which we design and deliver services. To learn more about this effort, please visit: https://performance.gov/2020cxmaps.

Overview

Our goal for this session is to capture your unique story and experiences. Together with others, we will identify common barriers, bright spots, and meaningful moments we can improve or build upon. We would like to spend up to 60 minutes with you and gather insights that will remain anonymous and synthesized in order to help support an enhanced customer experience.

If you are interested in being interviewed by our team, please sign-up for a time that works for you here: [insert link]

What to know

Taking part is voluntary: Participation in this conversation is completely voluntary. You may inform us that you wish to end your participation in the conversation at any time. You can take a break, choose not to answer any question(s), stop and continue at a later time, or stop altogether. If you decide to withdraw from this conversation, we will ask you if the information already collected can be used. If you tell us no, we will not use that information.

Confidentiality and Privacy: We minimize the personal information that we collect and will not identify you as a source of information (i.e., we will not use any personally identifiable information such as last name, social security number, etc.). In addition, disclosure of any private details to us is at your discretion and you are not obligated to provide any information you are not comfortable sharing. We respect your privacy. In the United States, the Paperwork Reduction Act requires the Federal government to outline how information collections like these will be conducted, and how that information will be used. You can find more about our “PRA statement” at the website listed above, and the control number this collection has been approved under is 2900-0876.

How we’ll use the information: We will create a customer journey map that aggregates insights we learn across customer stories. An example of what this looks like can be found here: https://www.performance.gov/mapping-cx-journey/ We also plan to create customer cards (example of which can also be found at the above website), that share summaries of individual stories, but will not attribute it in a way that is identifying. If you are comfortable, at some point we may ask if you are ok with us taking pictures and using these pictures in the project summary materials.

Types of questions we’ll ask: The questions below are a notional example of the types of questions our team might pose during an interview. These questions are subject to change based on individual situations and contexts.

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Kicking it Off

● Tell us a bit about yourself and your family

● What type of work or hobbies do you enjoy?

● Tell us a bit about your neighborhood/community

Interacting with Services

● How did you learn about [disability/disaster assistance and services] (e.g. through friends/family, school, community providers, hospitals, etc.)?

● In the past month/year/appropriate timeframe, what services or benefits have you received?

● How do the services and benefits you receive help you?

● What people or places have been most important / helpful to you?

High Points and Low Points

● Can you describe any memorable moments or experiences related to receiving these services?

● Tell us about a time when you felt stress or worry related to your care or services

● Describe a time that you felt supported by your case worker, or someone else assisting you?

● What are some barriers or challenges you've faced related to these services / benefits?

Family and Community

● How do you family or friends assist you with getting the care or services you need?

● Where do you go in your community or neighborhood to receive care or services?

Reflection

● When you think about the care and services you receive, how do you usually feel?

● If you could change anything about how you receive care or services, what would you change?

● If you could give advice to someone else seeking care or services, what advice would you give?

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