**Moderator Guide + Test Plan | IVR | Discovery Research and Usability Testing**

**UX Design Researcher:** Jill Meyerson

**Test Dates:** Dec. 16 and 17, 2019

In order to keep the details of this research confidential, some information has been redacted.

**INTRODUCTION**

Hi, my name is Jill Meyerson, and I’m a researcher here at XX. I will be chatting with you today. Thank you for agreeing to participate. Let me give you an idea of what to expect from the next hour.

To start, I’ll ask you some background questions and then we’ll discuss some of the reasons why you call XX. After that, I’ll give you some scenarios and ask you to call XX. When you call, please select the best option that you think will help you get the assistance you need.

I didn’t write anything you’ll hear today, so as we go through the scenarios, please give me your honest feedback, positive or negative, about your experience. There are no right or wrong answers and you can’t do anything wrong. I’m just interested in what you have to say and learning about your experience calling XX.

If you want to leave or take a break at any time, you are welcome to do so, just let me know. If decide to leave, you will still get paid for this session.

I would like to record our conversation so that I can come back to anything I might miss. Is that ok with you?

Do you have any questions for me? Ok, let’s get started.

|  |  |
| --- | --- |
| **SECTION 1: BACKGROUND QUESTIONS** | |
| Which company do you bank with? |  |
| When you have banking questions, what do you typically do? |  |
| Think about the last time you called your bank. Could you tell me about that? Why else do you call your bank? |  |
| Are there other ways you manage your finances? |  |

|  |  |
| --- | --- |
| **SECTION 2: SCENARIOS & TASKS**  **BRANCH PHONE NUMBER: 503-864-2288** | |
| Scenario 1: Call brick-and-mortar location and find out if you left your coat there | You went to the brick-and-mortar location earlier today and spoke to a customer service representative about XX. After meeting with the customer service representative earlier today, you drove 45 minutes to get home. When you walked into your house, you realized you might have left your coat at the brick-and-mortar location, but you’re not sure. |
| Task 1 | **Please call this number and show me how you would find out if you left your coat at the brick-and-mortar location.** |
| User Path Preferred option(s):   1. Press 3 to “speak to a representative” 2. Leave voicemail at brick-and-mortar location (if it’s closed) | Circle option user chose below.  #1 – Name of brick-and-mortar building, location, and hours of operation  #2 – Automated system or 24-hour call center  #3 – Leave voicemail at brick-and-mortar location |
| Observations/Notes |  |
| Follow-up Question | On a scale of 1 to 7, with 1 being extremely difficult and 7 being extremely easy, how would you rate this task?   |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | 1 | 2 | 3 | 4 | 5 | 6 | 7 | | Very Difficult | |  |  |  | Very Easy | | |  | |  |  |  |  | | |  | |  |  |  |  | | |
| Follow-up Question | Did the task work as you expected it to work?  YES I NO  Why? |
| Follow-up Question | If you could pick an adjective to describe this experience, what would it be? |

|  |  |
| --- | --- |
| Scenario 2: | You set up a XX 3 months ago for a vacation. During the past 3 months you have XX into XX whenever you could. You think you are ready for your vacation, but you want to check XX first. |
| Task 2 | **Please call this number and show me how you would find out how you would find XX information.** |
| User Path Preferred option(s):   1. Press 3 to “speak to representative” 2. Leave voicemail at brick-and-mortar location | Circle option user chose below.  #1 – Branch and Location  #2 – Automated system/24-hour customer service call center  #3 – Leave voicemail at branch |
| Observations/Notes |  |
| Follow-up Question | On a scale of 1 to 7, with 1 being extremely difficult and 7 being extremely easy, how would you rate this task?   |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | 1 | 2 | 3 | 4 | 5 | 6 | 7 | | Very Difficult | |  |  |  | Very Easy | | |  | |  |  |  |  | | |
| Follow-up Question | Did the task work as you expected it to work?  YES I NO  Why? |
| Follow-up Question | If you could pick an adjective to describe this experience, what would it be? |

|  |  |
| --- | --- |
| Scenario 3: | When you need to go to the brick-and-mortar location, you usually go in the morning, because it’s not as busy. But this morning, you had to go to a doctor’s appointment and then spent some time with a friend. It’s 4:30 p.m. and you still need to get to the brick-and-mortar location today, but you don’t know when it closes. |
| Task 3 | **Please call this number and show me how you would find out when the brick-and-mortar location closes.** |
| User Path Preferred option(s):   1. Press 1 for brick-and-mortar location and find the hours and address   Other option(s):   1. User could choose the other 2 menu options | Circle option user chose below.  #1 – Brick-and-mortar address  #2 – Automated system/24-hour call center  #3 – Leave voicemail at brick-and-mortar location |
| Observations/Notes |  |
| Follow-up Question | On a scale of 1 to 7, with 1 being extremely difficult and 7 being extremely easy, how would you rate this task?   |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | 1 | 2 | 3 | 4 | 5 | 6 | 7 | | Very Difficult | |  |  |  | Very Easy | | |  | |  |  |  |  | | |
| Follow-up Question | Did the task work as you expected it to work?  YES I NO  Why? |
| Follow-up Question | If you could pick an adjective to describe this experience, what would it be? |

|  |  |
| --- | --- |
| Scenario 4: | You want to open a XX at the brick-and-mortar location. There are 3 different options you can choose from and would like to learn more about each one. |
| Task 4 | **Please call this number and show me how you would get more information about the 3 options.** |
| User Path Preferred option(s):   1. Press 2 for “automated system or 24-hour customer service call center”   Other option(s):   1. Press 3 for “speak to customer service at the brick-and-mortar location” | Circle option user chose below.  #1 – Brick-and-mortar location and address  #2 – Automated system/24-hour customer service call center  #3 – Leave voicemail at brick-and-mortar location |
| Observations/Notes |  |
| Follow-up Question | On a scale of 1 to 7, with 1 being extremely difficult and 7 being extremely easy, how would you rate this task?   |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | 1 | 2 | 3 | 4 | 5 | 6 | 7 | | Very Difficult | |  |  |  | Very Easy | | |  | |  |  |  |  | | |
| Follow-up Question | Did the task work as you expected it to work?  YES I NO  Why? |
| Follow-up Question | If you could pick an adjective to describe this experience, what would it be? |

|  |  |
| --- | --- |
| Scenario 5: | You just reviewed your XX and saw a fee charged by XX that you don’t think you should have been charged. |
| Task 5 | **Please call this number and show me how you would get more information about the fee and if you were charged by mistake.** |
| User Path Preferred option(s):   1. Press 2 for “automated system or 24-hour customer service call center”   Other option(s):   1. Press 3 for “speak to representative at this brick-and-mortar location” | Circle option user chose below.  #1 – Brick-and-mortar location  #2 – Automated system/24-hour customer service call center  #3 – Leave voicemail at brick-and-mortar location |
| Observations/Notes |  |
| Follow-up Question | On a scale of 1 to 7, with 1 being extremely difficult and 7 being extremely easy, how would you rate this task?   |  |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | --- | | 1 | 2 | 3 | 4 | 5 | 6 | 7 | | Very Difficult | |  |  |  | Very Easy | | |  | |  |  |  |  | | |
| Follow-up Question | Did the task work as you expected it to work?  YES I NO  Why? |
| Follow-up Question | If you could pick an adjective to describe this experience, what would it be? |

|  |  |
| --- | --- |
| **SECTION 3: FINAL QUESTIONS** | |
| Consider the experience of all the calls today.   1. Explore reasons for choosing brick-and-mortar location vs. automated message vs. 24-hour customer service call center. |  |
| 1. What are your overall thoughts? |  |
| 1. Are there any scenarios where 1 of the options in the menu would NOT serve your needs? |  |
| 1. Are there any ways we could organize this better? |  |
| 1. Are the menu choices what you would expect? |  |
| 1. What do you think of the order of the menu options you heard? |  |
| 1. Any ways we can change the writing to make it clearer? |  |
| 1. Is there anything missing? |  |
| 1. Are there any parts that you would want us to keep? |  |
| 1. Are there any parts that you think may be unnecessary? |  |
| 1. How did it compare to other call experiences at other companies? |  |
| 1. After completing these activities, is there anything else you would like to add? |  |
| 1. Give participant SUS worksheet |  |

Ask observers if they have any questions.