

User research and testing

Understanding the people who use your service and their experience doing so is key to redesigning or developing new digital services that meet users' needs. Effective user engagement is essential to ensure successful design and take-up of new online services. It also provides evidence to inform the business case for change.

Digital Channel Shift Programme

The Digital Channel Shift Programme was set up to help councils and their partners to promote greater use of online tools and technologies for the benefit of both their customers and staff.

The aim is for the digital tools and solutions created through the programme to be reused by other councils and contribute to the wider work to transform local public services.

Focus on the user for success

Maintaining focus on the user to deliver a design that works and is adopted by customers is essential. Ultimately a beautifully designed service will not be a success if it does not take account of the user needs.

Services that are based on user research and sustained user engagement have the potential to save time and energy for all parties involved and make the customer journey efficient and effective.

Successful digital channel shift depends on delivering services that not only meet the needs of our customers but that customers choose to use over traditional contact methods. Channel shift represents not just an opportunity to move services online, but also a chance to look holistically at the service, the current process and method of approach by engaging with users to develop a redesigned service that better meets the needs of the target group.

Therefore, understanding the people who use (or potentially could use) your service as well as those who support them do so, eg frontline staff, is key and will enable the development of successful new digital services that meet users' needs. It also forms the basis for both future engagement and service take-up.

From the outset, project teams must seek to understand:

- who the likely users are (both internal staff and the citizen or other external partners)
- those who support the users or deal with their queries on the frontline
- what the user is 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 the existing services
- who the other internal and external stakeholders are (see briefing note on successful stakeholder management).

It is important that all users are included in this process, for example, differing demographics, those with disabilities and those that may need support – or assisted digital – to use the new service. This is particularly true with government services as there is a duty to enable citizens to access the services to which they are entitled.

However, when moving from user research to defining a set of requirements for a product or service, a key piece of advice from the Government Digital Service is to 'find what works, not what's popular'.

Comprehensive advice on undertaking user research can be found in the GOV.UK Service Manual: User Research¹.

Councils in the Local Government Association (LGA) Digital Channel Shift Programme used a range of methods included in this advice. For example, reviewing existing evidence such as metrics, comments and complaints about existing service delivery, analysing drop-out rates within the current customer journey, interviewing actual or potential users, talking to people inside and outside their organisation who knew and understood the service and the user group, and undertaking thorough user testing.

¹ www.gov.uk/service-manual/user-research

Question and test assumptions

A number of our teams went into their projects with assumptions about their users and what the solution would be. However, testing these assumptions early during the discovery phase enabled projects to change their approach and redefine outcomes where needed.

Seeing, for example, how a user is struggling to navigate through a web page can provide compelling, and previously unknown, insight into the effectiveness of the current service.

Some projects also challenged traditional demographic assumptions that older people and those with low literacy or for whom English is a second language, for example, are unlikely to be able – or willing – to enjoy the benefits of the online world. Councils such as Lichfield and Rochdale proved that that such simplistic assumptions do not hold true, and have delivered significant success in terms of the take-up of new digital channels.

Rochdale, for example, found that children were helping older family members with limited English language skills after school hours via digital services – something that they would not be able to do during council opening times using traditional contact methods.

In Cheltenham, the change from the manual process to the new digital service was expected to be a big cultural change for taxi drivers as they were used to dealing with council in the ‘old’ way – but thanks to successful user engagement and testing, the take-up of taxi licensing applications via mobile phone has been a resounding success.

Be imaginative and flexible for success

As noted above it is very important to engage users in designing and testing products, but projects found that it can often be hard to engage the public in user research for public services.

Councils participating in the Digital Channel Shift Programme therefore adopted flexible and innovative approaches towards gaining a deep understanding of their customers' needs.

A number of councils – including Rochdale – involved their contact and service centre staff in collecting user feedback during customer interactions to inform change and then, importantly, to assess how well the changes were received.

Some councils including Lincoln opted to use council staff as an easily accessible pool of people for initial user research – noting that councils employ a wide range of demographics and the majority of staff are also end-users of the revenues and benefits services. In addition, many projects rightly targeted the 'digitally capable' as quick wins for self-service – and council staff are demonstrably digitally-capable in that they already use online services in their daily working lives.

A number of projects delivered online forms for self-service. In all cases a satisfaction survey was built into these forms to enable the capture of information for ongoing research and iterative development.

When a service was to be used or delivered offsite it was essential to conduct research out in the field. For example, in Newcastle, research at household recycling and waste sites demonstrated that the majority of site users would have access to a mobile phone, but not always necessarily a smart phone. To meet user need the team felt it was clear that SMS text messaging would enable the most people possible to access the service. In addition, as staff wear protective gloves while onsite, it was essential that the service could be used on an easy-to-access device with large buttons.

A number of projects encountered problems with running their user research. For instance, in Liverpool the project team encountered difficulties engaging with funeral directors due to the unpredictable nature and timing of the service need. To counter this the team had to become creative and instead harnessed the experience of a staff member who had previously worked for a funeral director. Using this perspective the team delivered a highly successful user experience for funeral directors to use self-service to book crematoria and cemetery funeral slots.

Harlow undertook testing for the initial online forms (moving into or out of the borough) during an internal soft launch to test the My Revenues and Benefits service via the intranet, asking staff to sign up for the service and to feed back on any issues. The floorwalking team then provided an opportunity for further testing by taking customers through the self-serve process on four terminals in the self-serve area and gaining feedback on the usability and content of the online forms. The response to this form of engagement and testing was very positive and valuable feedback was gained on content and navigation that was subsequently incorporated into future changes in the forms. For example, floorwalkers found that customers were interpreting questions differently and put forward a strong case for using simpler language.

North Yorkshire's team made significant and successful use of Google Analytics, constantly monitoring usage and customer journeys to both check how current and new processes worked and to continuously look for opportunities to improve.

Elmbridge's research indicated that 90 per cent of all incoming text messages are read within three minutes, and that over 99 per cent of all text messages are read by the recipient. Using the GOV.UK Notify SMS channel therefore provided an opportunity to increase council tax payment rates through timely 'nudges' via text reminders.

West Sussex's special educational needs assessment team took advantage of the knowledge, expertise and existing buy-in of the parent-carer forum to research how best to improve the process of applying for support for children with additional needs in the school environment.

In each of these examples, the project team had to think creatively to reach their users to get their input. However, this is essential if the solution developed and deployed is going to reflect the needs of the users. Also, the insights and experiences of users of the existing service can be powerful in highlighting the difficulties and frustrations it creates, however inadvertently. This evidence can also help get support from senior sponsors and frontline staff who previously did not really understand the experience of the users.

Test, iterate and test again

Testing new digital solutions with users should be done at various stages throughout the development process as well as when the organisation is ready to deploy the new solution, in order both to inform the development process and then check the new processes and services are meeting user need.

All the projects were clear, however, about the value of thoroughly testing throughout the lifecycle of the project. They also recognised the importance of involving all internal stakeholders, users and end-customers as much as possible in this process.

West Sussex took advantage of Flashback software to test its checklist and application forms with parents, carers and school SENCOs. The software monitored eye movements and tracked actions taken to complete the task. This feedback was used alongside traditional, verbal, feedback to improve the tools – for example, some users felt that the initial designs and language were too ‘harsh’ for such an emotional issue and further iterations amended the language to make the process less daunting to parents and carers.

In general, the projects tested developments with their users during the user research phases as well as testing the new services ahead of launch. A significant number of these projects successfully deployed an agile and iterative approach to development, with iterations tested at every stage.

Whilst online services used by the public must be straightforward and intuitive, internal elements of the processes are often more complex. Therefore, thorough internal user training is also essential if a redesigned or new system is to be successfully adopted by staff.

Top tips

- Take full advantage of the free resources and advice available in the Government Digital Service GOV.UK Service Manual: User Research: www.gov.uk/service-manual/user-research.
- Make user research a priority from the start of the project.
- Be imaginative and flexible to engage with ‘hard to reach’ users – for example consider using video conferencing or personal visits.
- Manage user expectations about service outcomes.
- Use analytics to gain insight on customer journeys.
- Deploy research tools such as eye tracking software to explore how users are reading online forms.
- Engage internal users and stakeholders from the outset in the testing process.
- Be sensitive to service demands (eg annual workloads/peak events) when scheduling testing.
- Book in time with service specialists and internal users for repeated rounds of testing during development.
- Test, test, and test again – you can never do too much testing.
- A product is never finished – continuous improvements can be made.



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