User Engagement Best Practices

To create solutions that are useful, usable, desirable, and help people get "jobs" done, it is imperative to engage users and stakeholders at multiple phases of the design process.

User engagement can sound daunting, but there are effective methods for engaging users at key steps. The expenditure of time and resources for user engagement is more than offset by the savings from avoiding mistakes discovered after the system is live, when it is hard and costly to fix.

UNDERSTAND YOUR USERS AND STAKEHOLDERS

Have you identified all the major stakeholders and user types to involve in the user engagement process?

Identifying users is a particular challenge in social services because the population using the system will be very diverse. Users include applicants/beneficiaries, the people who assist them, and the organizations in which those assisters work. Identify the characteristics that likely will influence needs or possible use behaviors across users and recruit a representative set of users to provide input.

Be sure you have the right mix of people representing a variety of needs and experiences. Be careful not to use proxies for the people who will use the system day-to-day. For example, advocates for consumers have a wealth of information and experience to share, but they still are not their clients and cannot represent the entirety of their client's experience, including their emotional journey. It's important to have both perspectives.

UNDERSTAND THEIR "AS-IS" EXPERIENCE

How are systems being used day-to-day now? What are the common issues or pain points? What are users asking for?

Data to help understand current experience can come from sources such as website analytics, social media activity, call-center activity, and satisfaction surveys. You can also benefit from baseline usability testing with representative users. Each source tells you a piece of the larger puzzle. Not only will this help focus solution efforts, it will also establish baseline criteria by which to evaluate the new system.

TAKE TIME TO OBSERVE PEOPLE USING THE SYSTEM

Can you observe users in the context that they use the system?

You can engage representative users to more deeply understand their goals, the context in which they are using systems to "get their work done," and any issues with the current system. It is important not only to talk to users, but also to observe them directly. Both observation and interviews are most effective when done in context, such as at an assister's office, a community center, an applicant's home, or watching remotely if they are using the system in a "self-assist" mode.

Typically this type of engagement is conducted with a small sample of users and helps you get at the kinds of problems people can't articulate and other types of data not shown quantitatively. Watching users with an emotional and vested connection to the outcome provides insights other channels cannot uncover.

ENGAGE USERS DURING THE DESIGN PROCESS

What are the best ways to gain user insights throughout the design process?

Utilize these methods to engage users while the system is being designed:

- Create an advisory group and call on them periodically to help the design team refine requirements and keep focus on user experience. The advisory group could represent experts and/or a group of representative users.
- Facilitate focus groups to evaluate high-level concepts.
- Conduct usability testing on early prototypes to gain feedback on what's working or not working in the design. Ideally, you would do this more than once in the process.
- Conduct "participatory" or "co-design" sessions. These are typically hands-on activities where representative users make suggestions for specific design details.
- Go back into the field for more in-context observation or deep dives into thornier problems

These different approaches are not mutually exclusive; in fact, it is best practice to use a number of different methods since they each collect a different type of data. It is important to inject new perspectives into these ongoing activities. Try to avoid using the same people who helped design the system as your usability test participants, for example. A different set of eyes and perspectives can provide new insights. The advisory group is the main area where it may be beneficial to have the same participants to provide consistency across the project.

TEST BEFORE LAUNCH

Is the system working as designed? Can users complete their tasks successfully? Is the system efficient?

Two types of testing usually take place prior to system launch: 1) user acceptance testing (UAT), which is where stakeholders (often state agency clients) test the system to ensure that it is bug-free and meets the requirements; and 2) validation user testing, where the system is tested with representative users to validate the usability of the system. Both tend to be more formalized than usability testing earlier in the process, where the purpose is to gain insights to help refine a design.

CONTINUE ENGAGING USERS ONCE THE SYSTEM IS LIVE

What are people's experiences with the system once it has been launched? Are there further opportunities to improve?

No team gets everything right the first time, or even has a chance to investigate and test all aspects of a system before launch. In addition, when systems go into day-to-day use, unforeseen or unexpected issues can come up.

Post launch, start measuring how the new system is performing relative to the baseline metrics set up when evaluating the as-is state, and identify both technical and policy reasons for success or gaps in expected performance.