Digital by Default Service Assessment user researcher checklist

In preparation for a service assessment (going from alpha to beta, during beta or going into the live stage), the user researcher may need to provide details of the user research work they've carried out in respect of the service.

The following list can be used as a prompt for the details that may be asked at the service assessment.

Detail who carried out the user research and advised on assisted digital in terms of their time, qualifications and experience.
State (briefly) the user needs for the service (one sentence is preferred).
Describe the user research done: ● User research methods (detailing whether qualitative / quantitative) ● Recruitment of users and how they were selected ● Number, demographics and relevant characteristics of users (including digital proficiency) of your service and of those consulted ● With assisted digital users and on the processes to support them ● By reference to call centre staff and analytics to indicate the parts of the service which appear to pose difficulty for users ● Frequency of usability testing and the extent to which a separate test environment or prototype was tested (anticipated that at least 5 users per sprint will be consulted for user research) ● How any prototype, used for testing at the alpha stage, works as an end to end user journey for all user needs, including those with assisted digital needs ● Coverage of the full functionality of the service including failure paths, non-digital steps of the system and to support assisted digital ● In respect of the use of alternative channels for the current and future systems ● To explain the extent to which non-digital channels, and alternative digital channels, have been and/ or are necessary to meet specific types of users' needs ● Test with the minister responsible for the service (as evidenced with video or signed confirmation)
Describe what was learnt from user research and/ or usability testing and how this was incorporated into the service design.
Describe and provide examples of how the user research findings are communicated to, and acted upon by, the service team: ● Detail the communication processes ● Provide recordings of usability testing including with less digitally minded and non-subject matter expert participants (during beta or going into live) ● Example user research reports ● Example user stories created to express user needs

- Examples of how the service team has responded to user research and/ or usability testing
- Explain the level of iteration of design and content based on user research

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Describe the user research carried out to conclude that most users will be able to use the service first time unaided (completion statistics?).

(Going into the beta stage, detail the plan for this research).

Describe any user research done to inform the service name.

Describe the usability testing to ensure a smooth user journey between GOV.UK and the service.

(Going into the beta stage, detail the plan for this usability testing).

Detail how user satisfaction will be measured (during beta or going into live).

Detail plans for user research to be done in the next stage, including

- User research resource – time, qualifications and experience
- Testing environment
- Frequency of testing
- How results will feed into the service design.

In respect of the assisted digital provision, the assisted digital lead should be able to explain the following:

Following the alpha stage:

- what they have learnt from conducting user research with assisted digital (AD) users of the service
- the volume of AD transactions they expect, and what that is as a proportion of total transactions for the service
- what the barriers are for AD users to use the digital service independently
- how they plan to test their AD support before the service moves to beta on a service.gov.uk domain
- how they will gather user insights from user research with AD users and use it to iterate their AD support before the service moves to beta on a service.gov.uk domain
- the user journeys for their relevant user personas (inluding ID assurance if required). This should include estimated volumes for web chat, telephone and face by face support
- how they plan to ensure AD support is sustainably funded and is free to the user

During the beta stage:

- what they have learnt from user research with AD users and how this has informed their AD support for the beta
- what AD support will be in place for the beta. This should include:

- - timelines
  - support and funding by channel
  - expected volume and costs by channel during the beta and after live
  - joined up and consistent support across central government transactions
  - incorporation of digital inclusion
  - evidence that support meets legal requirements such as langauage, data protection and accessibility
- how they will test their AD support during the beta
- how they will gather user insights from AD users and use them to iterate their AD support during the beta

Going into Live:

- how they have tested and iterated their AD support during the beta and what they have learnt for the live service
- how their AD support meets user needs and provides value for money, showing that:
  - volumes and costs are in line with estimates
  - AD users are aware of support and can access it easily
  - AD support is consistently and clearly branded as a government service
  - wait times for AD support are low by channel
  - high proportion of AD users complete the transaction
  - volume of AD users has decreased
  - the service is trusted by AD users
  - positive feedback from users and experts
  - good end-to-end user experience
  - joined up and consistent support across central government transactions
  - AD support meets legal requirements such as language, data protection and accessibility
- how they plan to iterate their AD support once the service has gone live
- how they will measure user satisfaction for their AD support; increase in AD users' digital skills and/or confidence to use the digital service independently and the decrease in the volume of people using AD support