

GAC field research plan

Feb 18 2020 | Written by Michelle Ng | Revised by Austin Wong

Context

On Feb 26 2020, we will be visiting the [Client Care Team](#) - our primary users, located at the ATB headquarter office, to conduct a field research session to gain better insight on how our product intervenes within their working process.

Objective

Primary

- Discover gaps and potential opportunities we have not discovered through conversational meetings
- Gain deeper understanding of our users by looking and participating at their day-to-day operations
- Compare between what users say vs what they actually do (Attitudinal vs Behavioral)

Secondary

- Build closer relationships with our users
- Understand the client care team structures

Hypothesis

1. Their daily work schedules are packed and they are on call most of the time
2. They are a team but work and manage on specific client portfolios individually
3. Reviewing application account openings is not the first priority of their job

Our teams

Interviewer: Austin & Michelle

Observer: Austin, Braden, Steven, Chris, Henry, Michelle

Facilitator: Austin

Participants

Team: Call center/ Gac users

Number of participants: 4, ideally more

Roles: Team lead, personal banking specialist

Gender demographic: Ideally 50:50

Methods (Qualitative)

Participant observation

- Sit with participant side by side, have them demonstrate the way they work daily
- Understand their workflow, tasks and time management

Direct observation

- Observe both environment and participants

Qualitative interviews (focus on pain points and feedback)

- 1:1 interviews
- Focus groups (maybe)

Control variables

Office desk setup

Team members sitting together

Afternoon hours

Potential pitfalls

Effect of reactivity: the presence of researcher may influences participants' normal behaviour

Change of environment: users who work from home vs in office

Schedule (Tentative)

Timeline	Task	Details	Our teams
2:00 - 2:15pm	Introduction prep	Meet and greet, briefly go through timeline/task list with our participants	Everyone
2:20 - 3:00am	Participant observation	Sit with participants together to learn about their workflows	Austin, Braden, Steven, Michelle
3:00 - 3:15pm	Direct observation	Sit aside and observe the environment and participants	Austin, Braden, Steven, Michelle
3:15 - 4:00pm	Interviews 1:1/ focus group	10-15 mins 1:1 interview with 4 participants individually Maybe continue with focus groups interview to end off the session	Everyone

Interview questionnaires

The following questionnaires can be used anytime depending on context. It is not required to ask in chronological order.

Name:

Title: Assistant Manager ATB Client Care Sales

Years of experience:

Time at ATB:

--- OPENING ---

What is your role at ATB?

How long have you been working for ATB?

What are your background experiences?

--- ROLE ---

What are your day-to-day responsibilities for your job?

How big is your team?

What are some challenges when it comes to managing your team?

How do you make sure your clients are happy or have a good digital account opening experience?

What is the overall expectation and goals you want to achieve?

--- CLIENT SERVICE ---

How are clients feedback/notes being recorded/tracked right now?

How often do clients ask for support?

--- TOOLS ---

What kind of tools are you using right now? (Management, Tracking, etc)

What is the most important information you must know (ex: weekly, monthly, annually)

--- GAC ---

How long do you spend time on using GAC daily?

What are you using GAC for currently? What kind of information is important for you?

What would be useful for you in GAC beside the management aspect you mentioned from the feedback sessions last time?

What are the things that are useful for you currently? And what could be improved?

Other Participants

Name:

Title: Personal banking specialist

Years of experience:

Time at ATB:

--- OPENING ---

What is your role at ATB?

How long have you been working for ATB?

What are your background experiences?

--- ROLE ---

What are your day-to-day responsibilities for your job? Process?

What are some challenges when it comes to your work?

How do you manage your time and prioritize your tasks?

--- TOOLS ---

What kind of tools are you using right now?

What is the easiest and hardest part when it comes to using these tools? Why?

What can be improved?

--- GAC ---

What was the difficulty level when using GAC the first time? Was it easy to adopt after?

How long do you spend time on using GAC daily?

What are you using GAC for currently? What kind of information is important for you?

What are the things that are useful for you currently? And what could be improved?