

CX Research Activity Summary

About this activity

<i>Workstream</i>	RIE Stop Service Study
<i>Topic</i>	RIE Stop Service
<i>Prepared by</i>	Primary UXR: Daniel Grinberg Secondary UXR: Bonsuk Awani
<i>Date range</i>	March 2023
<i>Number of participants</i>	5
<i>Type</i>	Moderated
<i>Tools</i>	UserZoom
<i>Participant type</i>	Participants were National Grid customers from New York and Massachusetts. This was the closest parallel to Rhode Island Energy customers, who we first tried to recruit but both participants from Rhode Islands did not show up to the sessions.
<i>Useful links@</i>	Prototype
<i>DevOps story</i>	User Story 384011: RI SSM Landlord: Plan - Boards (azure.com)

Opportunities Summary

<i>Research Approach</i>	This research will employ a usability test through a prototype followed by a moderated qualitative interview focused on specific screens.
<i>Research Questions</i>	<ul style="list-style-type: none">• Are participants able to complete the task successfully?• How intuitive and usable is the proposed stop service flow?• What pain points and points of confusion did participants encounter?• What changes and improvements can be made?



Findings Keys

Few: 1-2 participants
Some: 3 participants
Most: 4 participants
All: 5 participants

In the usability test results, green arrows represent correct clicks that participants made and red arrows represent incorrect clicks that participants made.

Insights

Usability Test

- Some of the participants succeeded without difficulty. One participant succeeded with difficulty. One failed.
- The main issue that participants faced was locating how to stop service. Some did not choose the hamburger menu as the first option and one participant did not locate it at all.
- Some participants expected to be able to stop service from the Select Account screen. Most of them tried to stop service using the three dots on the Gas bar.
- When participants were unable to stop service from the Select Account, most of them tried the hamburger menu next. Some did so after a period of searching and scrolling.
- A few participants expected to see the stop service option from the Account Summary screen, as opposed to navigating through several other screens.
- Still, most participants reacted positively to the overall usability and ease of navigating the flow, describing the experience as “straightforward” and “simple.”

Individual screens

- A few participants found the questions about an onsite adult appearing on multiple screens to be redundant.
- Some participants had some confusion about the primary and secondary phone numbers and one participant thought the onsite and primary numbers meant the same thing.
- A few participants were confused if billing would end when service stopped or at the end of the billing cycle because this information was not provided.
- All of the participants liked the design and content of the confirmation screen, summary email, and confirmation emails.



	<ul style="list-style-type: none"> • Some participants wanted to have more functionality built into the email, such as the ability to reschedule appointments or getting text notifications.
<p><i>Recommendations</i></p>	<p>Select Account</p> <ul style="list-style-type: none"> • Add an option to stop service from the Select Account screen. <p>Confirmation of Residential Address</p> <ul style="list-style-type: none"> • Consider allowing customers to nickname different accounts so that it is easier and quicker for customers to distinguish between them. • Indicate more clearly that the number in the parentheses is the account number to avoid misinterpretation. <p>Onsite Adult Modal</p> <ul style="list-style-type: none"> • Consider adding information about how rescheduling would occur if no adult is onsite to avoid user confusion. <p>Appointment Window Selection</p> <ul style="list-style-type: none"> • Consider having the appointment window date and timeframe options on the same screen so that users do not feel annoyed or tricked. • Consider removing the section about the onsite adult from the appointment confirmation window, because that information is redundant and is not directly related to confirming an appointment window. • Consider noting that the standard timeframe is 8 a.m. to 8 p.m. before users select the date that they are available. <p>Onsite Contact</p> <ul style="list-style-type: none"> • Allow for primary account holders to include their phone numbers as a contact if they will not be the onsite contact and want to be contacted. • Add the option to receive texts or other notifications or alerts before the stop service and the day of stop service to improve communication and add flexibility. <p>Summary</p> <ul style="list-style-type: none"> • Add information about when billing for the service ends, either on the Summary screen or earlier in the flow so that customers do not have to guess or make incorrect assumptions.

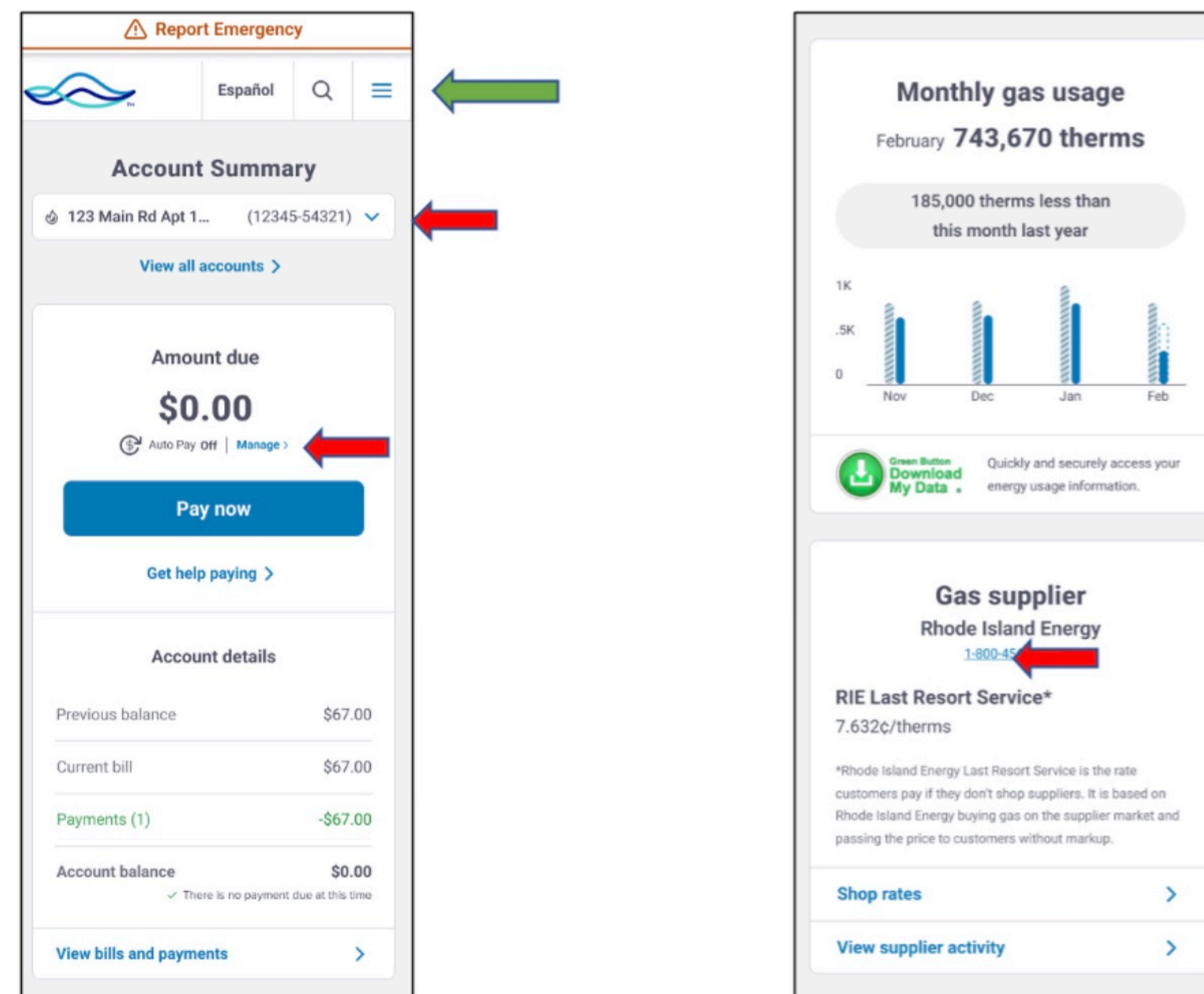


- Consider changing the names of primary phone number and alternate phone number to avoid confusion with the onsite contact number.

Confirmation Email

- Consider making the email more functional by adding options such as making payments, rescheduling, or cancelling stop service.
- Consider allowing participants to opt into text message notifications and alerts directly from the email confirmation screen.

Usability Test Insights



Three participants succeeded without difficulty.

One participant succeeded with difficulty.
One participant failed.

The main issue that participants faced was locating how to stop service. Some did not choose the hamburger menu as the first option and one participant did not locate it at all. The locations that participants clicked instead were the account dropdown, Manage Auto Pay, and the phone number for Rhode Island Energy.

Participants expected to be able to stop service from the Select Account screen.

Once they found how to Stop Service, they did not encounter any other issues in the flow.

“Initially, I wouldn’t expect to find the stop service or resume service function in that upper righthand corner. I would expect to be able to view that from my account window.”
– Participant 1

“It doesn’t look like there’s anywhere else to click, so I guess I would [click on the phone number].” – Participant 3

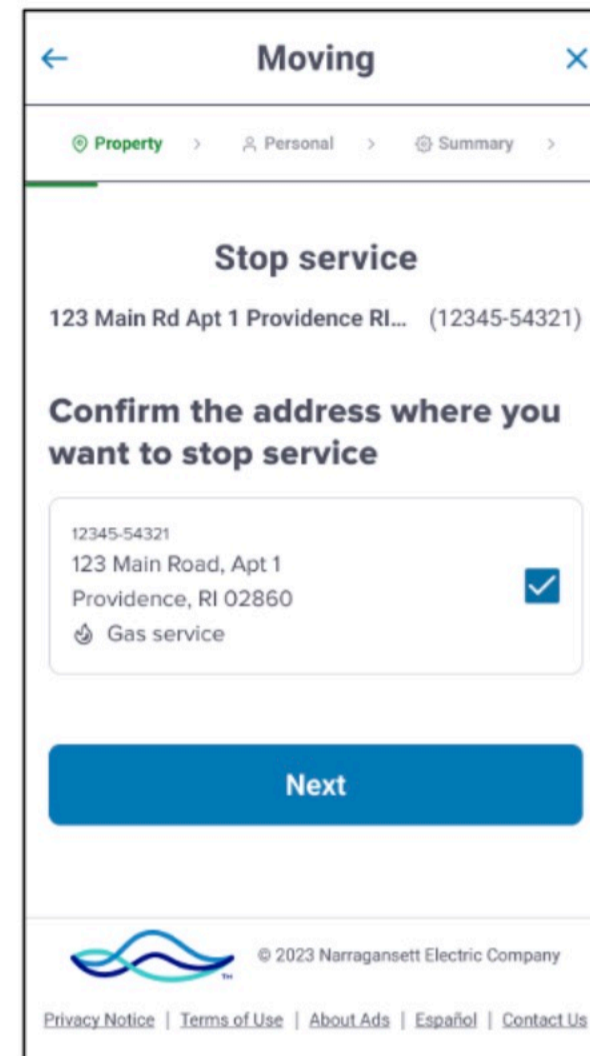
Recommendations

- Add an option to stop service from the Select Account screen.

Individual Screen Insights

Confirmation of Residential Address





All of the participants felt that the content and design on the confirmation of residential address screen worked well.

"I like it simple. If you have multiple addresses, I'm assuming they just show up in [other] boxes. Very easy to navigate and figure out where and what you're trying to do." – Participant 3

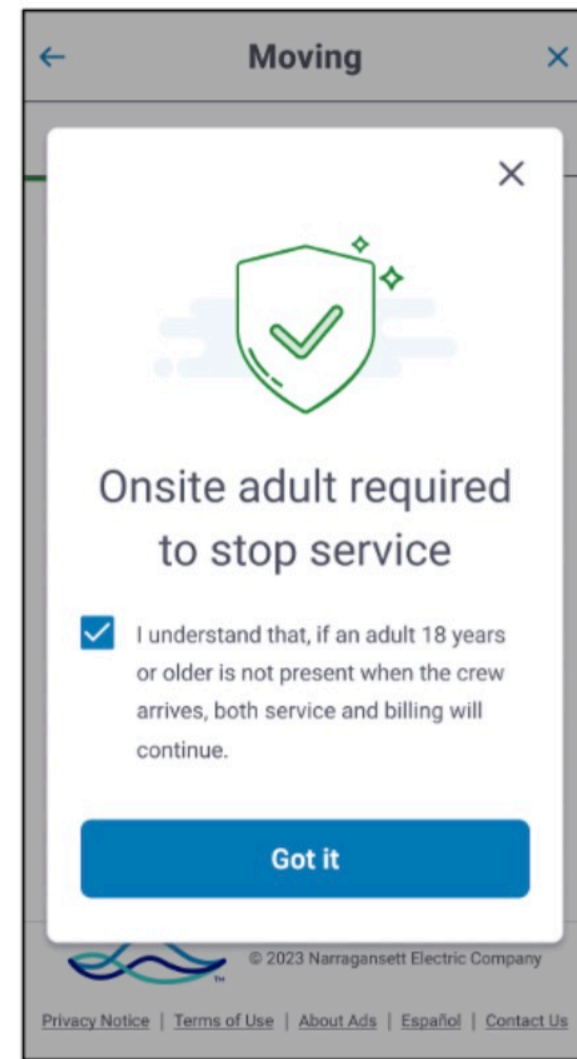
"It's a confirmation that I have the right address. It's good that there's a confirmation page to double-check that we're stopping service at the right location." – Participant 1

It would be more efficient if "you could check both [gas and electric] and then... select which ones you wanted to shut off [at the same time]." – Participant 4

Recommendations

- Consider allowing customers to nickname different accounts so that it is easier and quicker for customers to distinguish between them.
- Indicate more clearly that the number in the parentheses is the account number to avoid misinterpretation.

Onsite Adult Modal



All of the participants found the onsite adult modal content simple and straightforward. Most participants expected additional information about what would happen if an adult were not onsite.

“It’s very clear that there needs to be an adult there when” the crew is there. – Participant 1

If no adult were onsite, “the crew would just go back and I would hope that I get an email saying that they tried to come but no one was home, so I’ll have to reschedule.” – Participant 2

Recommendations

- Consider adding information about how rescheduling would occur if no adult is onsite to avoid user confusion.

Appointment Window Selection



The screenshot shows a mobile application interface for scheduling a service stop. At the top, there's a navigation bar with a back arrow, the title 'Moving', and a close 'X' button. Below the navigation bar, there are three tabs: 'Property', 'Personal', and 'Summary'. The main content area is titled 'Stop service' and shows the address '123 Main Rd Apt 1 Providence RI...' with a phone number '(12345-54321)'. A section titled 'When would you like to stop service?' asks the user to 'Select your stop service date' with a date picker showing '3/20/2023'. Below this is a 'Confirm appointment window' section with a checkbox for 'An adult 18 years or older will be on-premises for the entire 8 a.m. to 8 p.m. appointment window' and a radio button option 'This appointment window doesn't work for me'. A 'Next' button is at the bottom. At the very bottom, there's a copyright notice '© 2023 Narragansett Electric Company' and links for 'Privacy Notice', 'Terms of Use', 'About Ads', 'Español', and 'Contact Us'.

Most participants wanted to have shorter timeframes to accommodate changing schedules. (However, this may not be possible because of business concerns and the company being at risk of fines if technicians arrive outside of the appointment window.)

A few participants noted that the reiteration of the onsite adult requirement in the appointment window felt redundant and that it was an unexpected and unnecessary addition to that section.

“I find it odd how they say that they want an adult to be on premises eight a.m. to eight p.m. And then they put that little section at the bottom. A lot of people would miss that little blue part. A lot of people must go to work between those hours and would feel like they're housebound for those 12 hours and not see this option.” – Participant 2

“I would appreciate if there was a smaller section of time that I could choose from.” – Participant 3

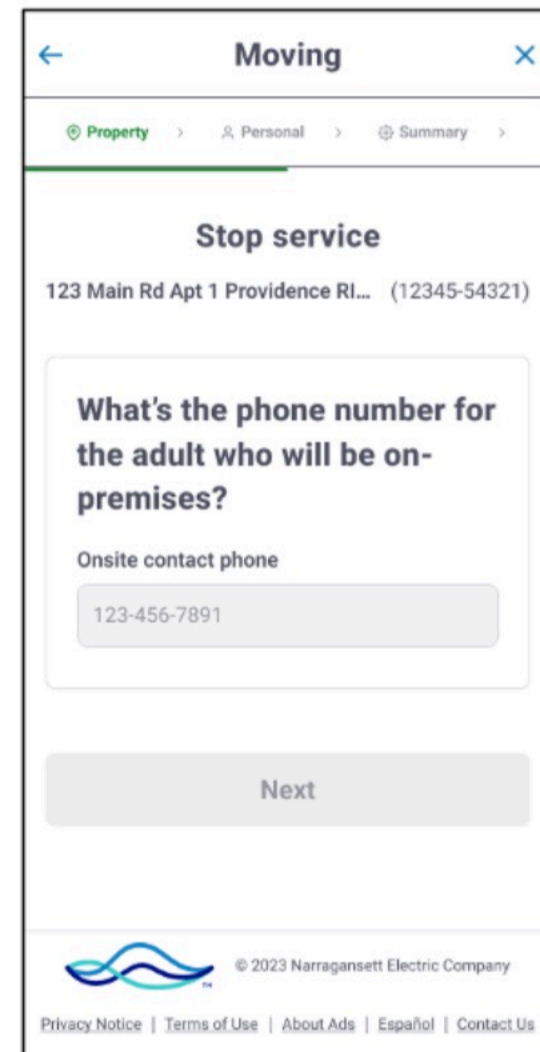
“This kind of throws me off because I'm looking at it as I'm confirming an appointment window. You should have the checkbox and then when you check that and hit next, another [message] should come up about an adult being present.” – Participant 4

Recommendations

- Consider having the appointment window date and timeframe options on the same screen so that users do not feel annoyed or tricked.

- Consider removing the section about the onsite adult from the appointment confirmation window, because that information is redundant and is not directly related to confirming an appointment window.
- Consider noting that the standard timeframe is 8 a.m. to 8 p.m. before users select the date that they are available.

Onsite Contact



The screenshot shows a mobile application interface for a 'Moving' process. At the top, there is a navigation bar with a back arrow, the title 'Moving', and a close 'X' icon. Below this is a breadcrumb trail: 'Property' (with a location pin icon), 'Personal' (with a person icon), and 'Summary' (with a document icon). The main heading is 'Stop service', followed by the address '123 Main Rd Apt 1 Providence RI...' and a zip code '(12345-54321)'. The primary question is 'What's the phone number for the adult who will be on-premises?'. Below this, there is a sub-label 'Onsite contact phone' and a text input field containing the number '123-456-7891'. A 'Next' button is positioned below the input field. At the bottom of the screen, there is a logo for '© 2023 Narragansett Electric Company' and a row of links: 'Privacy Notice', 'Terms of Use', 'About Ads', 'Español', and 'Contact Us'.

Most participants did not have any issues understanding the phone number screen.

However, most participants did state that text or email or other alerts the day before and the day of the stop service would be useful.

Some participants also noted that they would want to include their numbers as a contact if the onsite contact was not the homeowner.

“You'd want your phone number [available] in case they can't find you. Or maybe they want to text you or let you know, 'Hey, we'll be there in the next hour.'” – Participant 2

When the homeowner will not be onsite, have the homeowner's “contact information and then the contact information of the secondary person who will be onsite.” – Participant 4

Recommendations

- Allow for primary account holders to include their phone numbers as a contact if they will not be the onsite contact and want to be contacted.
- Add the option to receive texts or other notifications or alerts before the stop service and the day of stop service to improve communication and add flexibility.

Summary

The screenshot shows a mobile application interface titled "Moving" with a close button (X) in the top right corner. Below the title is a breadcrumb trail: "Property > Personal > Summary". The main heading is "Stop service" followed by the address "123 Main Rd Apt 1 Providence RI... (12345-54321)".

The form contains several sections:

- Stop service address:** 1234 Main Rd Apt 1, Providence, RI 02860. Includes a "Gas service" toggle.
- Stop service date:** 3/20/2023. Includes an "Edit" link.
- Stop service timeframe:** 8 a.m. to 8 p.m.
- Onsite contact phone:** Must be at least 18 years or older. 484-777-8484.
- Mailing address:** 1234 Main Rd Apt 1, Providence, RI 02860. Includes an "Edit" link.
- Primary phone:** 610-555-1212. Includes an "Edit" link.
- Alternate phone (optional):** -
- Enrolled in Auto Pay:** WELLS FARGO BANK ****888

At the bottom of the form are two buttons: "Submit" (blue) and "Cancel" (white). The footer includes the logo for "© 2023 Narragansett Electric Company" and links for "Privacy Notice", "Terms of Use", "About Us", "Feedback", and "Contact Us".

All of the participants liked the layout and content of the summary screen.

A few participants were confused about when billing for the service would end because that information was missing. It was not clear to them if it would end when service stopped or at the end of that month's billing cycle.

One participant also thought that onsite contact and primary phone meant the same things, even though the numbers were different.

"It's pretty straightforward and clear, easy to read. It's giving me an overview of all the information that I've used to set up this stop service appointment." – Participant 1

"It doesn't say anywhere [about when payment ends] so I would contact [PPL] . . . I would expect it to the payment to stop the day the service stops . . . but that's only based on past experiences. There's nowhere on here that indicates that's how it would be." – Participant 3

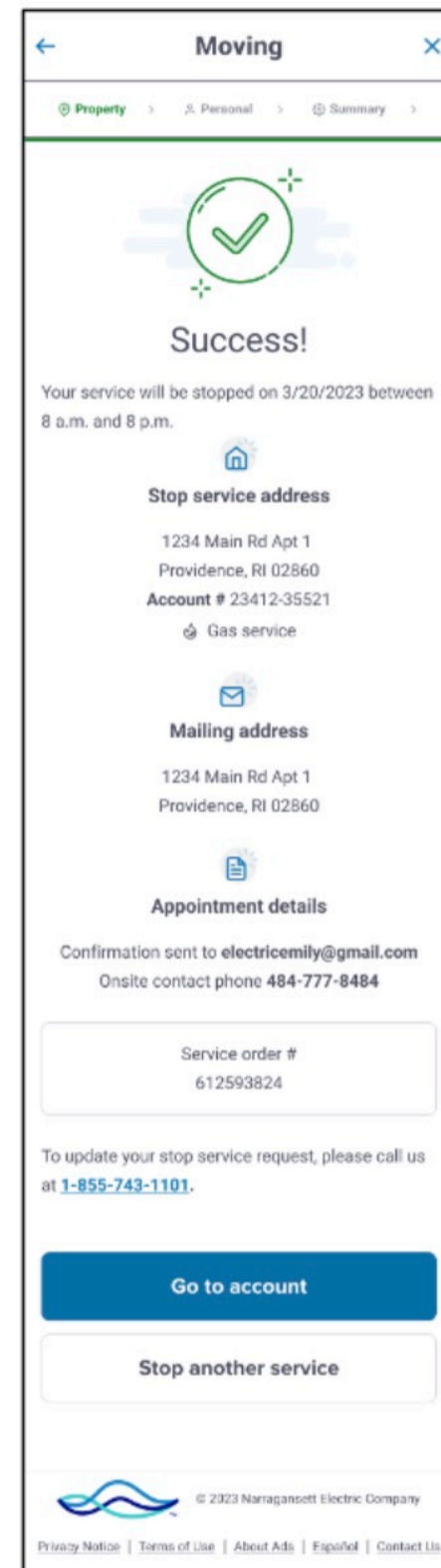
"I think the primary phone number would be the person that's going to be the onsite person, that's going to be in charge. The alternate number would be in case the [primary] person can't pick up. To me, primary and onsite are the same thing, because primary means first." – Participant 4

Recommendations

- Add information about when billing for the service ends, either on this page or earlier in the flow so that customers do not have to guess or make incorrect assumptions.
- Consider changing the names of primary phone number and alternate phone number to avoid confusion with the onsite contact number.

Confirmation



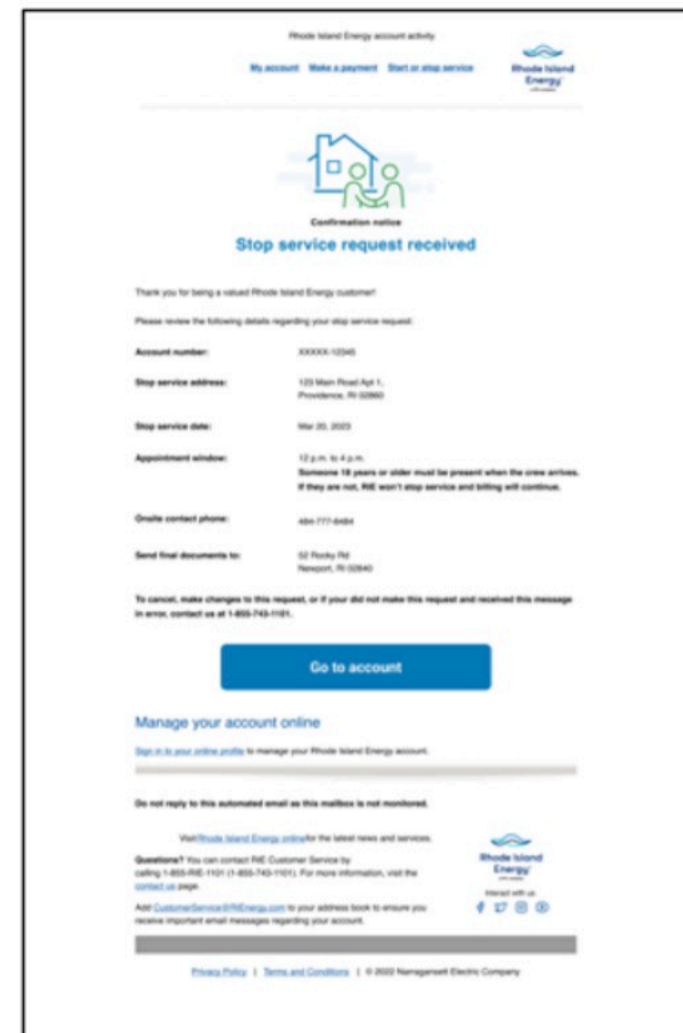


All of the participants liked the layout and content of the summary screen. They had no questions or suggestions for how to improve this page.

"I like that they sent a confirmation email to my email. This provides me with a lot of good information that I should know." – Participant 1

"Everything is laid out very well and easy to read and understand and navigate through." – Participant 2

Confirmation Email



Most participants found the confirmation email effective and appreciated the simplicity of the layout, content, and option to take action directly from the email.

Some participants wanted to have more functionality built into the email, such as the ability to reschedule appointments or getting text notifications.

“It’s a pretty standard service request notice. It lists the address, the date, the appointment time, and contact information.” – Participant 1

“A reminder text would be good. . . Maybe an email with the confirmation information and then you can flag it or star it and then a text message [right before the appointment].” – Participant 2

To cancel an appointment, I’d want a “button to cancel it directly from your email or have it go to your account and you can cancel it from there.” – Participant 3

Recommendations

- Consider making the email more functional by adding options such as making payments, rescheduling, or cancelling stop service. (Note: As of now, the only way that customers can reschedule a date is by calling.)
- Consider allowing participants to opt into text message notifications and alerts directly from the email confirmation screen.