Virtual Assistant – Power Outage + Account Maintenance

Moderated Usability Testing

Background and Methodology

Overview

Scenario

We presented a series of scenarios to our users (3 for Power Outage and 3 for Account Maintenance).

In our **Power Outage** tests users were tasked with navigating the Virtual Assistant with the goal of (1) reporting an outage, (2) checking an outage status, and (3) enrolling in outage alerts.

In our **Account Maintenance** tests users were tasked with navigating within the Virtual Assistant with the goal of (4) review their communication preferences, (5) add a new email address, and (5) add a phone number

Strategy

The test used a combination of **tasks** and **verbal questions** throughout the session and probed for clarification and more details, as needed.

Goal

To evaluate the effectiveness, efficiency, and user satisfaction with the virtual assistant interface. This involves assessing how well users can interact with the chatbot to accomplish common tasks related to utility services, such as bill inquiries, service disruptions, or account management.

The test aims to identify any usability issues, user frustrations, or points of confusion within the virtual assistant's design and functionality. Insights gained from the usability test will inform improvements to enhance the overall user experience, making the virtual assistant a more valuable and user-friendly tool for customers interacting with the utility company's services.

Methodology

A total of **10 moderated usability tests** were conducted using the UserTesting panel. Respondents were required to be a customer of Georgia Power (smartphone users aged 26-62). All contributors were responsible for paying their electric power bill.

The tests were conducted remotely via UserTesting.com and lasted on average about **49 minutes.**

Participant Demographics

Participants aligned with the following demographics:

- **Sample size:** 10
- **Age Range:** 26 - 62
- **Gender:** Any
- **Device:** Mobile
- **Rate Plan:** Any
- **Other qualifications:**
  - Active Georgia Power customer
  - Responsible for paying the electricity bill at my residence and/or my business

Insights: Power Outages

Users' Past Experience – Users Natural Inquiry Channel

As part of our preliminary questioning users were presented with all 3 test scenarios and asked to identify the communication channel they would be most likely to utilize to find resolution to each of the respective issues presented.

In Scenario 1: *There's a blackout currently affecting your neighborhood and you want to report that to your power company.*

> **0 out of 10** users stated browsing the **Customer Support Portal (OCC)**
> **3 out of 10** users stated they would call a **Phone Agent**
> **1 out of 10** users stated they would be most likely to initially reach out via **Email**
> **6 out of 10** of users stated they would first reach out via the **Virtual Assistant**

In Scenario 2: *A few hours have passed, and now you want to check for an update regarding the power disruption in your neighborhood.*

> **4 out of 10** users stated browsing the **Customer Support Portal (OCC)**
> **2 out of 10** users stated they would call a **Phone Agent**
> **1 out of 10** users stated they would be most likely to initially reach out via **Email**
> **3 out of 10** of users stated they would first reach out via the **Virtual Assistant**

In Scenario 3: *You want to make sure you're updated whenever power disruptions in your house and/or neighborhood happen in the future and get real-time notifications.*

> **5 out of 10** users stated browsing the **Customer Support Portal (OCC)**
> **1 out of 10** users stated they would call a **Phone Agent**
> **2 out of 10** users stated they would be most likely to initially reach out via **Email**
> **2 out of 10** of users stated they would first reach out via the **Virtual Assistant**

Users' Past Experience – Users Natural Inquiry Channel

In Scenario 4: *To ensure seamless and accurate communication with Georgia Power, you want to view/check your communication preferences to see if any update is needed.*

> **9 out of 10** users stated browsing the **Customer Support Portal (OCC)**
> **0 out of 10** users stated they would call a **Phone Agent**
> **0 out of 10** users stated they would be most likely to initially reach out via **Email**
> **1 out of 10** of users stated they would first reach out via the **Virtual Assistant**

In Scenario 5: *You have a new roommate who recently moved in with you and they mentioned that they would like to receive the same emails from Georgia Power that you do. Ensure your roommate's email is added to the system, so it can be utilized later for alert or billing configurations*

> **5 out of 10** users stated browsing the **Customer Support Portal (OCC)**
> **2 out of 10** users stated they would call a **Phone Agent**
> **2 out of 10** users stated they would be most likely to initially reach out via **Email**
> **1 out of 10** of users stated they would first reach out via the **Virtual Assistant**

In Scenario 6: *Recently you got a new work phone that you have been utilizing more often than your personal. You want to ensure your work phone number is added to the system/under your account so it can be utilized later for alert or billing configurations.*

> **7 out of 10** users stated browsing the **Customer Support Portal (OCC)**
> **1 out of 10** users stated they would call a **Phone Agent**
> **1 out of 10** users stated they would be most likely to initially reach out via **Email**
> **1 out of 10** of users stated they would first reach out via the **Virtual Assistant**

Users' Past Experience –
Impressions of Customer Chat Bots

What are your impressions of Customer Service chatbots? Have you used them in the past? Are there any features you appreciate in a Customer Service chat interface?

"One thing I do appreciate about a chatbot is that it does offer you the option when you've reached all the possibilities that it has available to you to go ahead and speak to an agent."
– test4u333 (51 y/o)

"I really like the fact that in most chats now you can easily get a transcript emailed to you." **– sidehusle (55 y/o)**

"I use them where I think automated prompts will be able to get me where I need to be." **– inmyzone1011 (43 y/o)**

"I've always appreciated the speed in chatbots response time, and avoiding long wait times." **– CountessFab (51 y/o)**

"I have used chatbots for other websites, customer service was extrodinarily slow when i try to contact a phone agent."
– NicoNa (62 y/o)

5 users mentioned appreciating being directed to a live agent in past chat experiences when the chatbot was unable to assist them with their inquiries.

2 users mentioned appreciating chatbots' fast response time and the convenience of not having to wait long to be connected to a phone agent.

5 users mentioned more frequently utilizing chatbots for basic vs complex inquiries.

4 users explicitly cited 'saving time' or referred to chatbots as a 'time-saver' as the reason why chatbots are their preferred customer service channel.

Task 1: Report an Outage

Scenario: There's a blackout currently affecting your neighborhood and you want to report that to your power company. Use the Virtual Assistant to help you.

Users began this task in a logged out state, and were given a test account credentials to log in as an option.
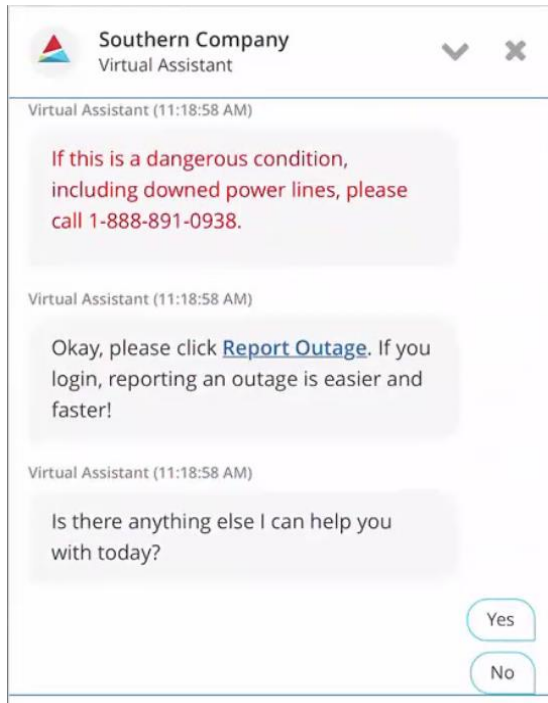
The ideal path to report an outage within the Virtual Assistant is as follows: **User Selects Power Outage > Report an Outage > Is directed to a form to Report an Outage**

All **10 users** utilized the automated chips and successfully engaged in this route

4 users had expectations to report an outage within the VA's chat interface and expressed confusion when the VA gave them a link to another page [Report an Outage] .

"I was a little surprised I was redirected to a website, I thought it would be able to resolve this in the chat itself" – **CountessFab (51 y/o)**

Southern Company Virtual Assistant

Virtual Assistant (11:18:58 AM)

If this is a dangerous condition, including downed power lines, please call 1-888-891-0938.

Virtual Assistant (11:18:58 AM)

Okay, please click Report Outage. If you login, reporting an outage is easier and faster!

Virtual Assistant (11:18:58 AM)

Is there anything else I can help you with today?

Yes

No

Task 1: Report an Outage – Prompted to Log In

Upon being transferred to the Report an Outage page users were met with the start page for the Outage Report form (below).
Before being prompted to engage with this page users were asked to share their impressions of its contents, and in particular the call out tab that suggested they log in.

Only **3 users** said they would take the log-in suggestion at this stage of this task. While **1 user** didn't say if she would or would not log-in, just that logging would be the first thing she'll do once she's in OCC.

"I wouldn't worry about that since… I would rather just put in my address [and fill in all the forms] because logging-in would probably just take more time."
– Mohd93 (32 y/o)
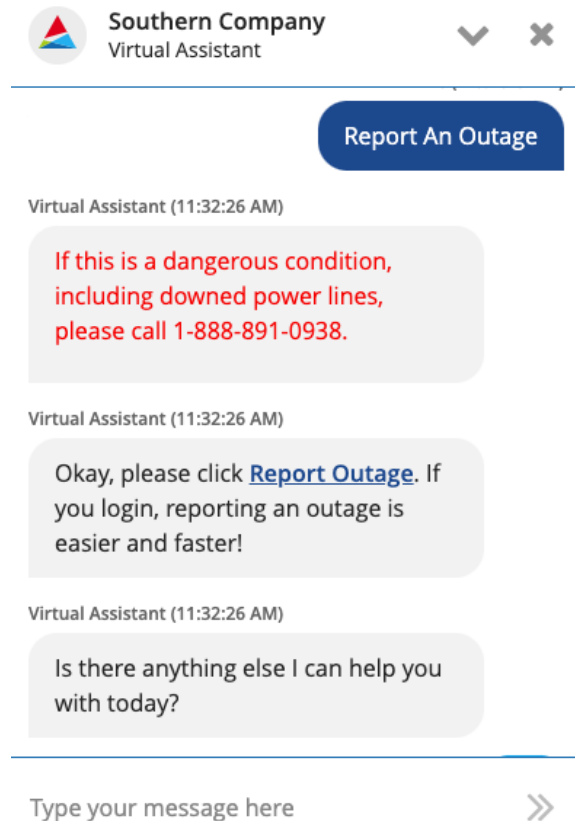
1 user was discouraged from this suggestion, mentioning the use of the word 'benefits' in this context felt vague and unrelated.

Inference: 'Log in for benefits' Notice
- The phrasing of this notice is vague and doesn't provide much insight into how this process could be enhanced from a logged in state
- Suggestion: Rephrase the copy or provide an expanded information toggle to include direct references to the available benefits.
- Copy edit: Currently text is displayed as "Loginfor benefits" missing 2 spacing points should be corrected to "Log in for benefits"

Task 1: Report an Outage – Ambiguity in Report Process

Upon selection of the initial Report an Outage chip, users are then transferred to a form to complete this process.

User confusion was commonly observed during this transfer sequence, seemingly stemming from the ambiguous language that surrounds the Report Outage link.

When prompted to navigate to the Report Outages page, **4 users** share that they expected to be able to resolve this task from within the chat module. Given this context users were confused with both the transfer message and where the link might direct them.

Inference: Channel Transfer Best Practice
- Be completely clear in the language being used as users are being transferred to another page. Offer insight into where they are in the process, and the steps ahead of them. (I.e. to report an outage complete this 3-minute form)

Task 2: Checking Outage Status

Scenario: A few hours have passed, and now you want to check for an update regarding the power disruption in your neighborhood. Use the Virtual Assistant to help you.

The ideal path to check an outage status within the Virtual Assistant is as follows:

User Selects Power Outage > Check Outage Status > System Informs User of Outage Status > User is given option to 'Provide More Information'

All **10 users** followed this path via the Automated Response Chips.

0 users typed in unique text.

Task 2: Checking Outage Status: Logged Out Users

Context: Upon selecting Check Outage Status, users in a logged out state were given a message prompting them to log in to "better help with your request"

Context: Users that stated they would log in were given test credentials to do so, these users remained logged in. Users who were logged out began this task logged out until they were directed to log in.
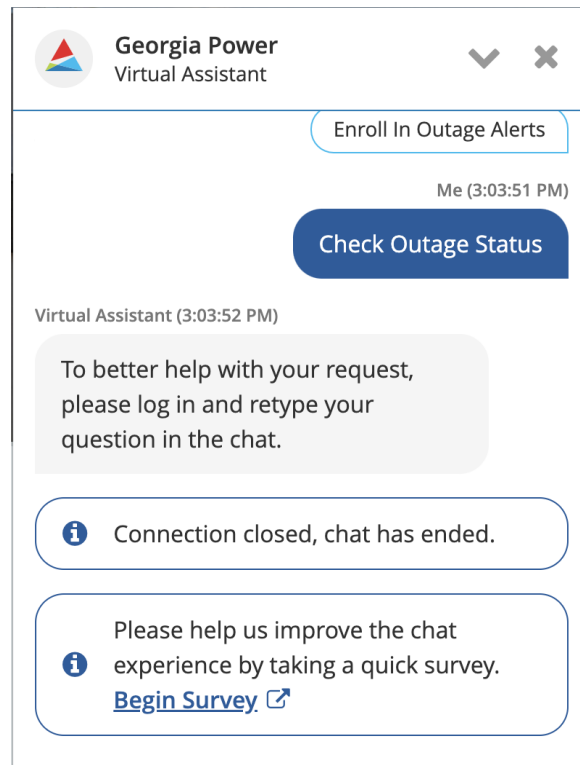
7 users expressed frustration from the VA's log-in suggestion in this sequence.

3 users explicitly stated that even though they were frustrated, they'd still go ahead and log-in and finish checking the outage status via the VA in real life.

User luvmy5 (59 y/o) suggested to *"have a prompt with a link that says 'log-in' so we can continue our conversation,"* when hit with the dead-end, instead of *"just a plain, unactionable message"* when the chat is abruptly ended.

BraveDave (61 y/o) said *"if I'm able to report an outage logged out just by providing a few details, the same thing should also be enough for checking outage status."*

Inference: Log in Suggestion
- Observing the frustration users experienced during this interaction, it would be fair to assume this transitionary sequence as a potential channel migration point from chat.
- Consider leveraging more action/process oriented language to keep users engaged. (ex: Instead of "To better help" say "OK your first step would be to log in")

Task 2: Checking Outage Status - Provide More Information Chip

Upon being informed of the System's data surrounding the power status on their account, users are given the opportunity to Provide More Information (below). This exchange was a source of notable user confusion. Most of the confusion seemed to surround users' expectations in the direction of the flow of information being provided.
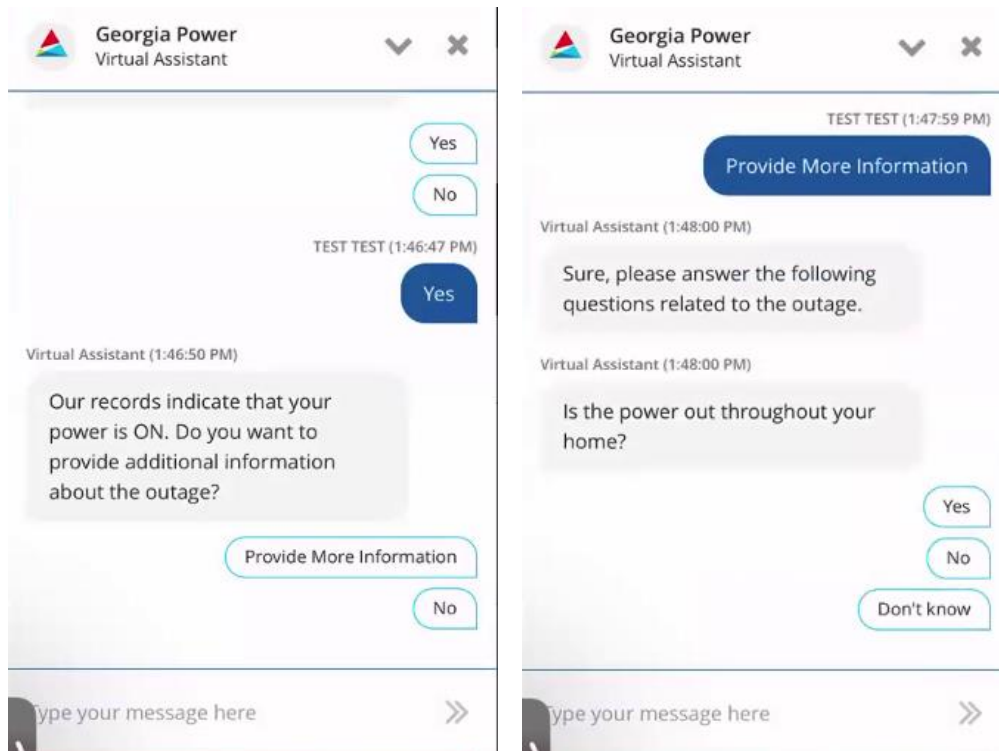
8 users clicked on the 'Provide More Information' chip (and said that that's also what they would have done in real life).

4 users thought the follow up questions under the Provide More Info chip were helpful/relevant.

"I like that they don't just tell me what's on their record, but they give me the option to provide more information and tell them what I would need to tell them and they didn't clutter it with unnecessary options" – **NicoNa (62 y/o)**

"I think these follow up questions all feel relevant. I think they're good qualifiers." – **inmyzone1011 (43 y/o)**

4 users misinterpreted the flow of information when selecting the Provide More Info chip

"I was expecting for the chatbot to come back with more info regarding the outage time frame... It's different from what I expected. I thought it would be giving ME information, not the other way around." **– test4u333 (51 y/o)**

"I'm a little confused by this statement 'provide more info' when I look back I read that. Unless I thought that providing more information would help me get my power turned back on, why would I want to provide more information?" **–**
*Smooth03 (36 y/o)*

Inference: Provide More Information

- Insight -- Half of the users that selected the *Provide More Information* response were expecting to be given more information as opposed to be the ones sharing it

- The copy is presented in such a way that allows for this misinterpretation, particularly for users who are **skim readers**, who tend to skim past automated text and focus on the response options. Additionally, the value of providing additional feedback here is not clear to users in the way that it's presented.

- **Suggestion** – Restructure the copy in the response message to emphasize the question being asked, by way of indentation, or alternate chat bubble copy.

Task 3: Enrolling in Outage Alerts

Scenario: You want to make sure you're updated whenever power disruptions in your house and/or neighborhood happen in the future and get real-time notifications.
Use the Virtual Assistant to set this up.
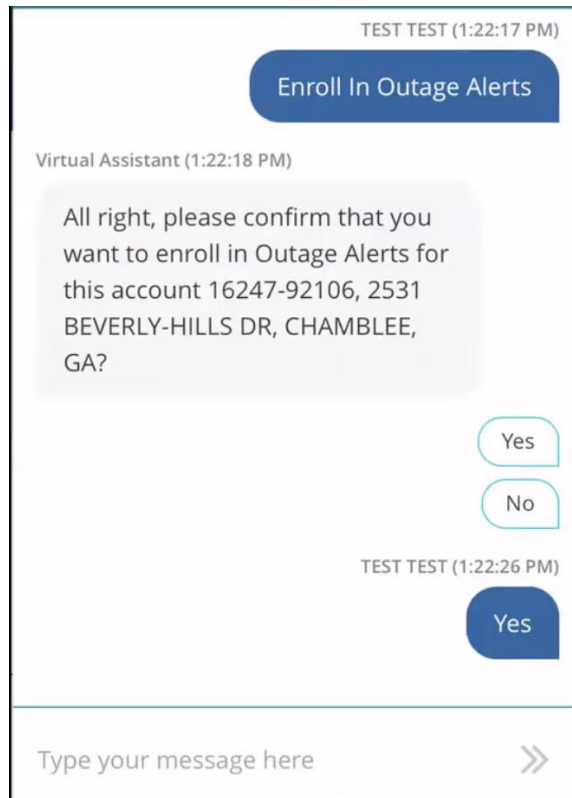
The ideal path to enroll in Outage Alerts within the Virtual Assistant is as follows: **User Selects Power Outage > Enroll in Outage Alerts > User Verifies Their Account & Address > VA Informs the user that it can enroll their primary email address or use a different one.**

4 users successfully enrolled in Power Outage Alerts by selecting the 'Power Outage' chip followed by the 'Enroll in Outage Alerts' chip. However, these same 4 users expressed a need for clarification regarding the delivery method of the alerts, whether through email or text.

6 users who were unable to enroll in Outage Alerts took the 'Manage Account and Profile Setting' chip route, and all 6 of them were left confused or unsatisfied by the limited options under the 'Manage Account and Profile Setting chip'.

"I selected this because it seems to be an ongoing situation with my account and not just a one time occurrence. Power Outage seems like a one time thing." – **inmyzone1011 (43 y/o)**

Task 3: Enrolling in Outage Alerts - Enrollment Summary

Upon completion of enrolling in outage alerts via the VA, the chatbot informs users that they are successfully enrolled in Outage Alerts and directs them to the Alerts & Communications page to edit their preferences
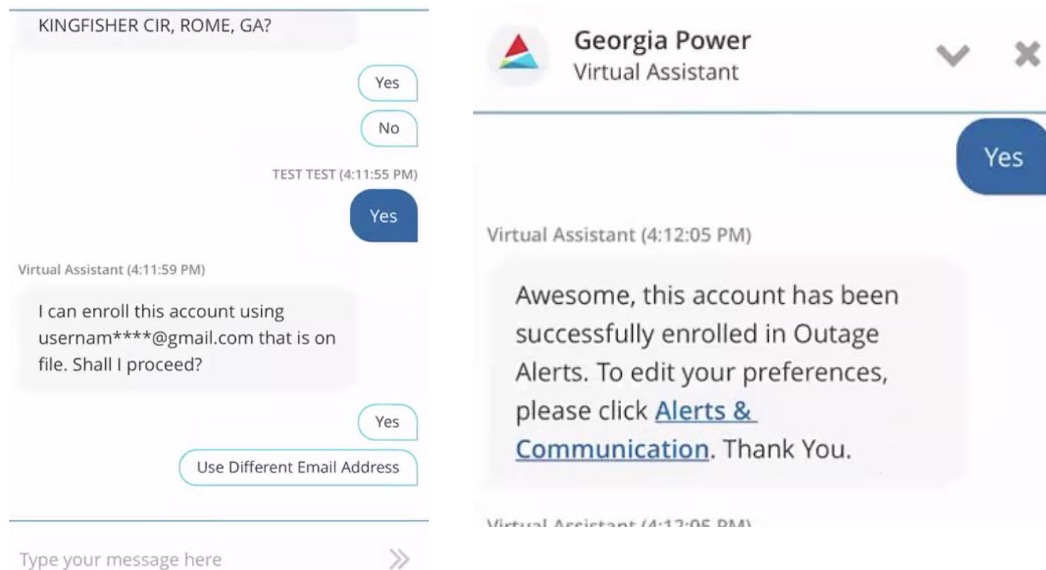

Inference: Summary of Enrollment
- Insight: User have a vague idea of what Outage Alerts might be, but it could be beneficial to offer users a more specific summary of what to expect from enrollment in Outage Alerts
  - (i.e. on completion of enrollment users offered summary "You've enrolled in Outage Alerts! Whenever there are reported outages in your area will send SMS text messages to 919-555-5555, as well as any updates along the way")
- Additionally, while users were enrolling in outage alerts via the Virtual Assistant, some users were only given the option to sign up for outage alerts via email and not phone. Some users expressed being disappointed with this. However, in more recent interactions with the VA, users are given a prompt to choose between phone and email.

"It would have been nice to have the option to do maybe a phone number if possible—I probably wouldn't want to do both, just because I would get overloaded with alerts." – Smooth03 (36 y/o)

Insights: Account Maintenance

Task 4: Reviewing Contact Information

Scenario: To ensure seamless and accurate communication with Georgia Power, you want to view/check your communication preferences to see if any update is needed. Use the Virtual Assistant to do this.
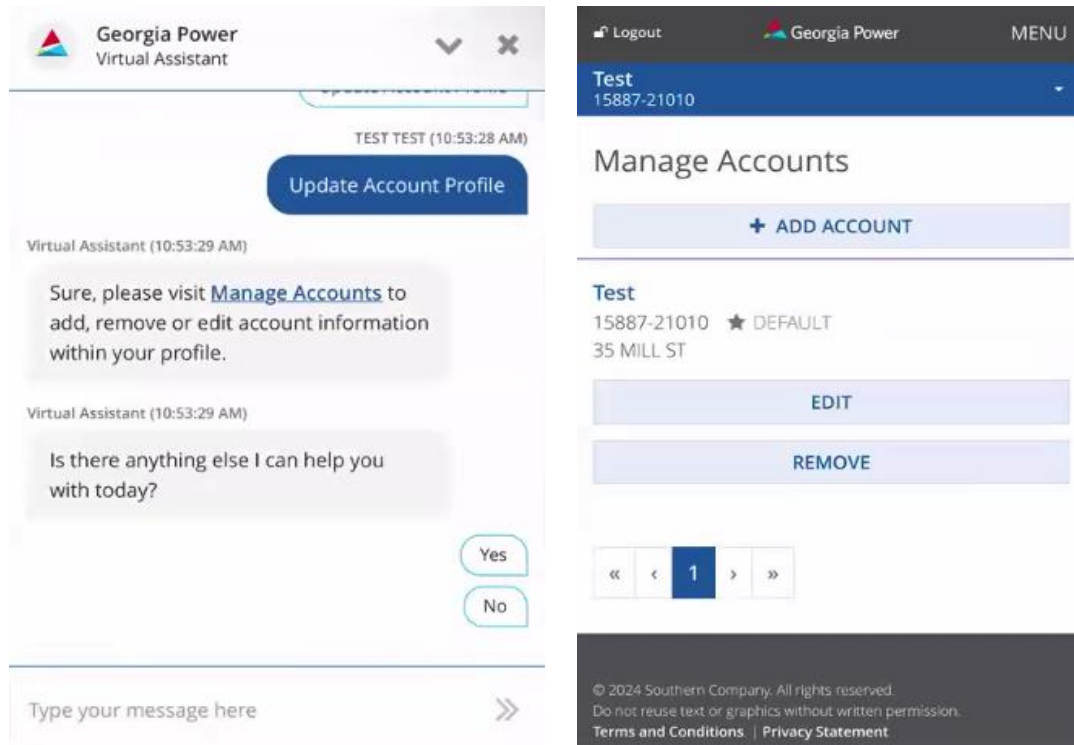
The ideal path to checking and updating one's profile within the Virtual Assistant is as follows: **'Manage My Account Profile Settings' > 'Update Account Profile'**

6 users who followed the 'ideal path' using the chips expressed confusion with the Manage Accounts link that was given to them by the VA.

All **6 users** who were confused by the Manage Accounts link expected it to take them to a location resembling either the My Profile tab Overview or the Alerts & Communications page. They pointed out that it should have led them to one of those destinations instead. Notably, **2 users** managed to navigate their way to the Alerts & Communications page, outside of the VA.

4 users typed in their queries, with **3** out of the 4 doing so after not finding the desired option upon clicking the 'Manage My Account Profile' Setting chip.

The unique text user used: "Review Account Settings" "communication" "update communication preferences" "update communications preferences"

Task 5: Adding an Email Address

Scenario: You have a new roommate who recently moved in with you and they mentioned that they would like to receive the same emails from Georgia Power that you do. Ensure your roommate's email is added to the system, so it can be utilized later for alert or billing configurations. Use the Virtual Assistant to complete this task.
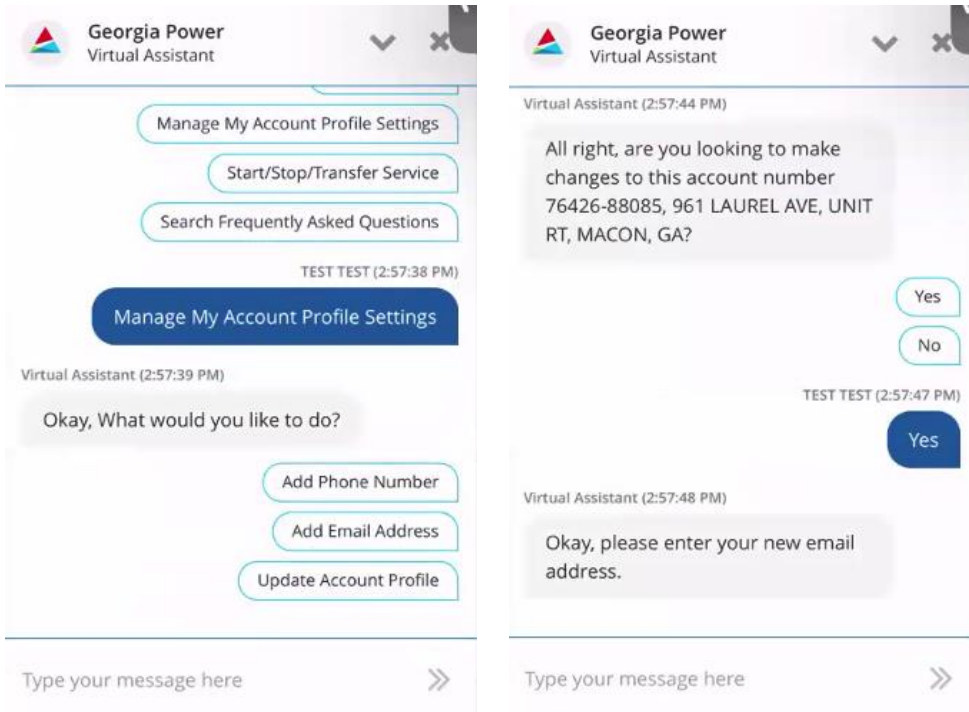
The ideal path to add an email address within the Virtual Assistant is as follows: **'Manage My Account Profile Settings' > 'Add Email Address' > User Verifies Their Account & Address > User Types In New Email Address.**

2 users successfully utilized this path via the chip flow and were able to add a new email address to their account.
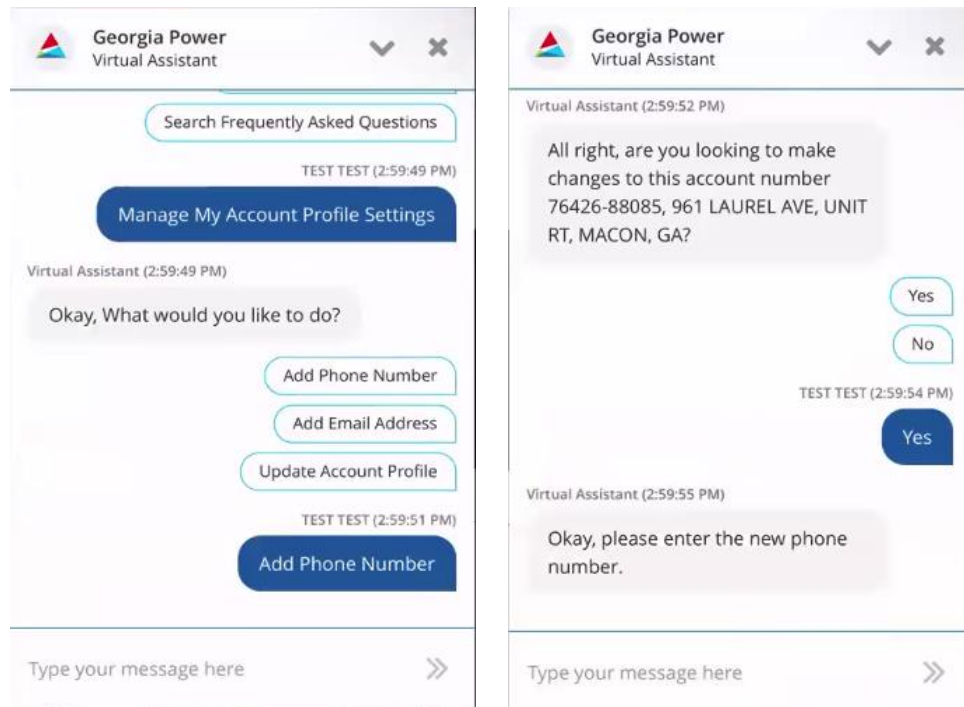
4 users utilized the following path: Manage My Account and Profile Settings > 'Update Account Profile' to add a new email. However, **all 4 users** were disappointed when the link provided by the VA (Manage Accounts) did not take them to their expected destination (Alerts & Communications page).

3 users utilized unique text to add a new email address.

The unique text user used: *"I need to add another email to this account", "add alerts", "email alerts"*

Task 6: Adding a new Phone Number

Scenario: Recently you got a new work phone that you have been utilizing more often than your personal. You want to ensure your work phone number is added to the system/under your account so it can be utilized later for alert or billing configurations. Use the Virtual Assistant to set this up.

The ideal path to add a new phone number within the Virtual Assistant is as follows:
'Manage My Account and Profile Settings' > 'Add Phone Number' > User Verifies Their Account & Address > User Types In New Phone Number.

6 users successfully utilized this path via the chip flow and were able to add a new phone number to their account.

1 user utilized the following path: Manage My Account and Profile Settings > 'Update Account Profile' to add a new phone number. However, this user was disappointed when the link provided by the VA (Manage Accounts) did not take them to their expected destination (Alerts & Communications page).

3 users utilized unique text to add a new phone number.

The unique text user used: *"I need to add another phone number to my account", "add another mobile number to the account.", "add another mobile number to the account."*

Inferences-- Concern with Overriding Primary Contact Method

In Tasks 5 and 6 users where users were asked to add an additional contact method to their account (phone/email) users expressed a similar concern in the early phases of the sequence relating to an accidental override of the pre-existing primary contact point.
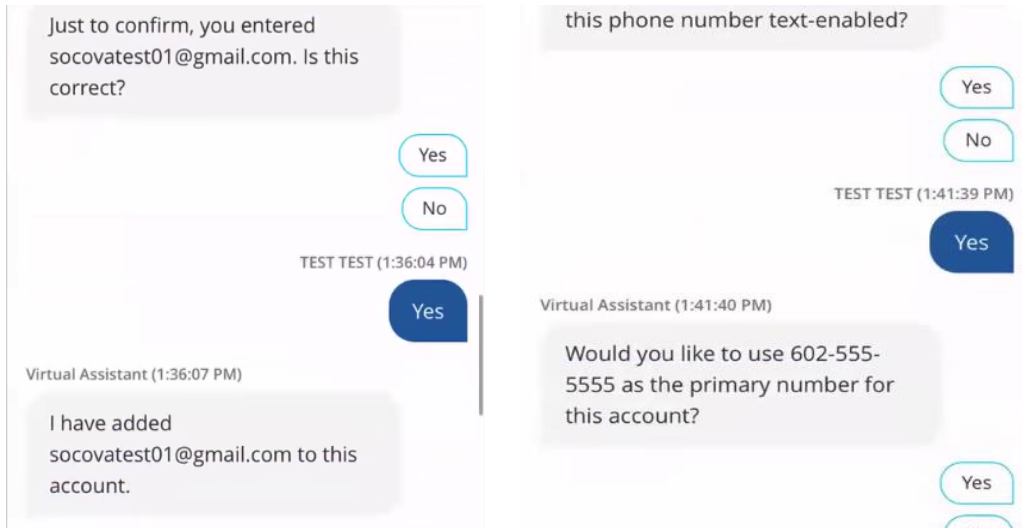
"Until I got to these last messages I wasn't really sure if I was adding or replacing, because it says 'enter your new email address,' but the ending dialogue made me feel more certain that I was actually just making an addition." – NicoNa (62 y/o)

2 users hesitated on adding their email with the assumption that doing would replace their currently existing email. While **4 users** hesitated on adding a new phone number in concern that it would replace their existing phone number.

This hesitancy was eventually relieved when the VA asked in a later response "Would you like this new number to be your primary number?"
User were observed relieved in reaction to the question

Inference: Primary Account Selection
To keep users engaged in self service options it's best practice to be proactive and account for any concerns earlier on to prevent channel migration.

Suggestion: Consider moving the question "Do you want this to be your Primary contact?" to the front of the sequence (i.e. after users select Add Phone Number > Would you like this additional number to be your primary number on the account?)

Alternatively this concern could be addressed by changing the "Add Email" and "Add Phone Number" chips to include the word additional (i.e. 'Add an Additional Email')

Inferences related to Account Maintenance– Significance of Adding Contact Method Flow

Upon entering the added phone/email address in the VA, users are informed that the contact method has been "added to this account" and concludes the interaction with a suggestion to visit Alerts and Communications to review communication preferences.

In response to this ending sequence in this task, **4 users** expressed that the VA could have provided more information regarding what happens after adding a new email or what actions they can take with the newly added email. Similarly, **1 user** shared this sentiment after adding a new phone number.

Virtual Assistant (1:36:07 PM)

I have added socovatest01@gmail.com to this account.

Virtual Assistant (1:36:07 PM)

If you would like to review or update your communication preferences, please click Alerts and Communication.

Virtual Assistant (1:36:07 PM)

Is there anything else I can help you with today?

Yes

No

Type your message here »

Virtual Assistant (3:00:33 PM)

I have added 602-555-5555 to this account.

Virtual Assistant (3:00:33 PM)

If you would like to review or update your communication preferences, please click Alerts and Communication.

Virtual Assistant (3:00:33 PM)

Is there anything else I can help you with today?

Yes

No

Type your message here »

Inference: Context for Alerts & Comms Page
Linking to Alerts & Communications is helpful for users and a logical next step for users, however it might be worth considering offering this link alongside a little more context to connect it with the completed action.

Example:"919-222-2222 has just been added to your account, if you would like to manage the notifications sent to this number, as well as review all your communication preferences please click Alerts and Communication"

In Users' Reflection of Engagement

What were your impressions of your interaction with the Virtual Assistant? Do you think you would be likely to engage with the Virtual Assistant after interacting with it in this test?

Did you encounter any points of confusion during this test?

In regards to the speed **9 users** expressed satisfaction with the speed offering comments like *"it's the perfect speed"* and *"I would give it high marks."*

1 user who wasn't completely satisfied with the VA's speed said, *"it left some things to be desired."*

The most common point of confusion users encountered was the inability to correct their choices or steer away from unintended interactions with the VA.
3 users referred to this as *'going down the rabbit hole.'*

In Users' Reflection of Engagement

If you were to suggest improvements to the Georgia Power Virtual Assistant, what would they be?
How would you compare this Georgia Power Virtual Assistant experience to other customer service channels you've used in the past?

"This chatbot preformed much better than other chatbots. It was much quicker and gave me a lot more suggestions which I really appreciated. I much prefer this chatbot here that tries to cover all the bases, it feels more focused and thought through." **— NicoNa (62 y/o)**

"If I encountered similar tasks in the future in real life, the chatbot would be my first choice." **— luvmy5 (59 y/o)**

A better flowcharting or labeling of the chips was the most common shared suggested improvement, mentioned by **3 users**

Following their engagement with the VA, **4 users** stated that Georgia Power's VA preformed better than other customer chatbots they've interacted with in the market.

"Flow charting is the main thing. You think of the main things that people need when they interact. I shouldn't need to waffle about where it [Enroll In Outage Alerts] could be." **— BraveDave (61 y/o)**

"I think one thing that could be improved… There was one time when I clicked on the link to go to my account and I was kind of confused about managing my profile." **— Smooth03 (36 y/o)**

Fin.