

# Currentchoice

User research study



## HF 780: Final Report

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## Introduction:

Currentchoice.com is a website which provides information about the electricity suppliers in a zip code necessary to make a switch and allows the users to switch to that supplier through its website. This report provides the information gathered about the user's motivations and behaviors behind switching electricity suppliers. The information is gathered through user research study conducted using semi structured interviews with participants. This report provides detailed information about the goals of the study, personas chosen, schedule, methodology, budget of the study, protocol used, analysis and recommendations from the study. Below is a brief chart with an overview of the information.

<b>Client:</b>	Current choice
<b>User Definition Approach</b>	Personas
<b>Participants</b>	6
<b>Schedule</b>	160 hours spread over 76 days
<b>Budget</b>	\$9180
<b>Method Used</b>	Semi structured Interviews

## Goals provided by client:

Goals chosen for the study have been highlighted among the goals provided by the client.

- **What are the key reasons that residential customers resist switching suppliers?**
- **What information or online experience do customers need to confidently switch from their electricity utility (outside of TX) or from their legacy provider in TX?**
- **What information would help support customer confidence in switching?**
- **In what format should this information be delivered -- (stories, process review, etc.) word-of-mouth, social media, PR, and news stories)?**
- **What are user's expectations from 'currentchoice.com' after the service is used for switching providers?**
- How do we best get referrals - social media?
- What is the profile of a customer that is most likely to switch?

## Personas:

Personas have been created based on the information provided by the client and the goals of the study. I will be using personas to define the user population for the following reasons.

- At the very initial stage of the user research where quantitative information is not available, market segments might not provide support to the profiles based on the information provided.
- Personas help to develop a broad scope of user population with the basic information on goals and the client which can later be made specific with more information gathered about the user later in the research.
- The demographic information might not help determine the research for this project since the project is more focused on the reasons and clarifications of the users with respect to electricity suppliers.

### Sarah – the energy saver



**Defining quote:** “I’ll be willing to switch my energy supplier today if someone can provide me an efficient way to save energy and related tips to do so.”

- Sarah often works from home and a regular user of ecommerce services.
- She likes to be efficient in performing her activities both at work and at home.
- She owns a 3 bedroom house for about 15 years and has changed her energy supplier a couple of years back.
- She tries to save energy by buying energy efficient appliances and by minimizing the wastage of electricity.

#### **Motivations:**

- To have constant check on the energy utilization and recommendations
- To perform the task of switching quick yet reliable

#### **Barriers:**

- Lack of collective information on various components of the energy utilizations
- Lack of trust on firms providing the facility to switch

### John – The money saver user



**Defining quote:** “I never thought of switching but will try it out, If someone can tell me how it’s done and convince me that process will save me money.” John is a very moderate user of online services and feels uncomfortable performing transactions online.

- He owns a 2 bedroom condo for about 5 years and has never changed his energy supplier.
- He never pays attention to his energy bills although he most often relies on the suggestions given by his friends and colleagues regarding the utilities of the house.
- He does like to save some money if it possible but never thought in terms of energy bills.

**Motivations:**

- To reduce electricity bills
- Switching providers with a clear understanding of the process and the value addition.

**Barriers:**

- Lack of knowledge on the process of switching energy supplier
- Lack of understanding on the comparison of the energy bills
- Minimal use of online services for ecommerce

**Budget:**

The total budget of the research is \$9180. The research work is conducted by 1 research consultant charging \$40/hr based on the average hourly charges by the consultants. Here is the breakdown of the total budget.

Currentchoice User Research Budget				
Consultant work	Charge per hour(\$)	No. of people involved	No. of hours worked	Total Paid
Consultant	\$40.00	1	160	\$6,400.00
Recruiter	\$30.00	1	16	\$480.00
Stationary and miscellenous				\$400.00
Travelling expenses (120 miles travelled)				\$700.00
Interview sessions	Per Session	No. of participants		Total Paid
Participants	\$100.00	6		\$600.00
Technology(Laptop, audio recorder, softwares)	\$100.00	6		\$600.00
<b>Total Budget</b>				<b>\$9,180.00</b>

## Schedule:

The project was spread over 76 days including weekends. The research work is conducted by 1 consultant working for 160 hours spread across the schedule.

Task	Duration (Days)	Start Day	End Day
<b>Currentchoice User Research</b>	<b>76</b>	<b>1/23/2014</b>	<b>5/8/2014</b>
<b>Ground work</b>	<b>2</b>	<b>1/23/2014</b>	<b>1/25/2014</b>
<b>Introduction to the project</b>	<b>1</b>	<b>1/23/2014</b>	<b>1/23/2014</b>
Research company and product details	5	1/24/2014	1/30/2014
Understand client goals	5	1/24/2014	1/30/2014
<b>Project Kickoff</b>	<b>16</b>	<b>1/30/2014</b>	<b>2/20/2014</b>
<b>User Definition</b>	<b>2</b>	<b>1/30/2014</b>	<b>2/1/2014</b>
Identifying potential users	1	2/1/2014	2/3/2014
creation of personas	3	2/4/2014	2/6/2014
Submit personas - v1 for feedback	2	2/13/2014	2/14/2014
review of personas - v1 and feedback	4	2/17/2014	2/20/2014
<b>Method identification</b>	<b>15</b>	<b>2/20/2014</b>	<b>3/12/2014</b>
Research each method	6	2/20/2014	2/27/2014
Create method chart to identify options	4	2/28/2014	3/5/2014
Submit methods chart- v1 for feedback	2	3/6/2014	3/7/2014
review of method charts - v1 and feedback	3	3/10/2014	3/12/2014
<b>First deliverable for client review</b>	<b>10</b>	<b>3/12/2014</b>	<b>3/25/2014</b>
Research goals finalized	7	3/12/2014	3/20/2014
Personas finalized	9	3/10/2014	3/20/2014
Methods finalized	9	3/10/2014	3/20/2014
Budget analysis	9	3/10/2014	3/20/2014
Submit deliverable to client	1	3/20/2014	3/20/2014
Client reviews deliverable and provides feedback	1	3/21/2014	3/21/2014
<b>Protocol Creation</b>	<b>12</b>	<b>3/20/2014</b>	<b>4/5/2014</b>
Create protocol for method specified - v1	5	3/21/2014	3/27/2014
Submit protocol for review - v1	1	4/3/2014	4/3/2014
Client reviews and provides feedback	2	4/4/2014	4/7/2014
<b>Method execution</b>	<b>21</b>	<b>3/28/2014</b>	<b>4/26/2014</b>
<b>Recruiting</b>	<b>16</b>	<b>3/28/2014</b>	<b>4/18/2014</b>
Create recruiter screener v1	5	3/28/2014	4/3/2014
Client reviews screener v1	2	4/4/2014	4/7/2014
Modify screener based on client feedback	2	4/8/2014	4/9/2014
Discuss requirement with recruiter	2	4/10/2014	4/11/2014
Complete recruitment	5	4/11/2014	4/17/2014
Send reminders for participants	2	4/17/2014	4/18/2014
<b>Research method sessions</b>	<b>6</b>	<b>4/18/2014</b>	<b>4/26/2014</b>
Prepare for sessions (pilot)	1	4/18/2014	4/18/2014
Run sessions	5	4/19/2014	4/26/2014
Consolidate notes for analysis	1	4/27/2014	4/28/2014
<b>Analysis</b>	<b>5</b>	<b>4/28/2014</b>	<b>5/3/2014</b>
Analysis of the observations from sessions	4	4/28/2014	5/1/2014
Prepare the results from observations	1	5/2/2014	5/3/2014
<b>Final Deliverable creation and presentation</b>	<b>4</b>	<b>5/3/2014</b>	<b>5/8/2014</b>
Create client presentation v1	2	5/3/2014	5/6/2014
Submit client presentation v1 for feedback	1	5/6/2014	5/6/2014
Modify presentation based on client feedback	1	5/7/2014	5/7/2014
Present findings to Client	1	5/8/2014	5/8/2014

## Method Chart:

Method	Why	Weakness	To be considered?
<b>Interviews</b>	<b>Running interviews with users will help us understand their motivations to switch electricity and utility providers and their knowledge about switching their providers.</b>	<b>The users might not think of switching electricity providers as often which makes it difficult to get the information through one on one interview.</b>	<b>Y</b>
<b>Focus groups</b>	This method will help to have a discussion among users on knowledge about switching energy suppliers and their experiences in the process of switching	This method might not provide an underlying motivation or the lack of it regarding the process of switching providers.	Y
<b>Focus troupes</b>	This use of vignettes will help users to provide their thoughts along with the intensity of the problems in the process of switching providers which help us prioritize or design the process.	Vignettes might not represent the complete process and for the research goals mentioned we need descriptive information on switching process rather than a feedback on a particular scenario	N
<b>Bodystorming</b>	Body storming will be helpful in understanding some aspects of the research such as user looking for understanding the user's knowledge about the supplier and provider of electricity	This is not the best method when the research goals are more focused on user's general thought process of switching utility/ electricity suppliers than an actual tangible product	N
<b>Contextual inquiry</b>	This will be a good method if the goal is to understand the How user's actual use look for information or do their research for the information on the energy suppliers and what aspects of their context would influence their thoughts about the process.	Conducting research in user's location or context might not be possible at all times and sometimes change the way user's behave upon the researchers present.	Y
<b>Log book</b>	This method is useful in to collect information about the energy bills over longer periods and users consumption habits. This method can also help us gather information about the user's regular thoughts about	Users might not provide regular updates on decisions about switching providers of utilities which provides much less data over a long period of time.	N

	energy supplier if any		
<b>Card sorts</b>	This method is best used to understand the mental models of the users on the process of switching providers and the can help define the layout of the current process and any other required information for the users.	The cards should be carefully designed to allow the users to portray their mental models effectively without any restrictions.	Y
<b>Survey</b>	Surveys would help to identify overall gaps in the experience across a large number of people, regardless of whether they are actively intending to switch electricity providers or not.	This method won't be efficient in answering the research question about user's motivations and behaviors behind their requirements to switch the suppliers	N
<b>Collage</b>	Collaging can get at emotional pain points in trying to absorb the vast nature of how the electricity supply and demand market are understood, and then approached for switching context.	A list of emotional pain points will not lead to obvious gaps in the experience of switching electricity providers. This needs to be introspected further to just understanding overall themes.	N
<b>Usability roundtable</b>	This method relies on getting experts who are well versed in switching providers to come and share solutions in terms of how they absorb the complexity of the information, and also how they get answers to basic questions on switching electricity providers.	The experts might only cite their approach and solution to switching electricity providers. This might overlook the basic information that a "Lay person" would need to have satisfied.	Y
<b>Ethnography</b>	This method might offer insights into how the users switch providers using online services which provides great insights into what users look for and what do they provide as information	This might not be possible when there is no physical system available to perform those functions and the user cannot be observed without their knowledge.	N

**Chosen Method:** Research Interviews

**Reason:** I will be performing the **interviews** as my **research method** since it provides the depth required to understand the user's knowledge about the process of switching providers as well as some insights into the website's current process which is exploratory. I feel much more comfortable in getting information through conversations than those other methods.



## Protocol:

S.no	Protocol question	Related Goals
1	<b>Awareness about the electricity bills/ suppliers</b>	
1.1	“Describe to me the kind of information provided to you in your electricity bills. What do you pay attention to? What do	What information would help support customer confidence in switching?
1.2	What kind of information would you expect to find in your electricity bill?	
1.3	How do you know If your electricity bills are high or low?	
1.4	How do you compare your electricity bills / unit price with other suppliers?	
2	<b>Idea of switching electricity suppliers</b>	
2.1	Have you ever thought of switching your electricity provider?	What are the key reasons that residential customers resist switching
2.2	What will make you switch your electricity provider?	What are the key reasons that residential customers resist switching
3	<b>Gathering information for switching suppliers</b>	
3.1	What kind of information would you expect to gather for switching suppliers?	What information would help support customer confidence in switching?
3.2	How would you gather that information? Explain the process?	In what format should this information be delivered -- (stories, process review,
3.3	Would you consult anyone for information about switching?	In what format should this information be delivered -- (stories, process review,
3.4	Have you compared the pricing of different electricity suppliers in your region in the process?	What information would help support customer confidence in switching?
4	<b>The process of switching suppliers</b>	
4.1	Describe, how you would switch your electricity provider/ how you switched your provider earlier?	What information would help support customer confidence in switching?
4.2	Would you try to do that using the online services? How would you expect the online process to be for switching?	What information or online experience do customers need to confidently
4.3	How long would you expect the process to take? Why?	
5	<b>After switching suppliers</b>	
	What would be your expectations from the electricity suppliers after switching to their service?	What are user’s expectations from ‘currentchoice.com’ after the service is

## Participants:

Participants have been recruited based on the general attributes of the personas mentioned above. Total of **six participants** have been recruited where 3 have been interviewed in person and 3 have been interviewed remotely. 3 of the participants are from **Massachusetts**, 2 are from **Illinois**, 1 from **Pennsylvania**. 2 of the participants recruited were close to Sarah's persona and the remaining 4 were close to John's persona but some new attributes have been observed which will be discussed at the end of the report. Representative participants for Sarah's will be shown as S1, S2, S3...and so on while for John's persona will be shown as L1, L2...and so on in the analysis section.

## Methodology:

Participants have been asked questions through the journey map of switching electricity suppliers through a semi structured interview sessions which lasted 45 minutes each.

## Analysis & recommendations:

This section will provide information about research goals, findings, analysis of findings and corresponding recommendations in each step of the journey map for switching electricity suppliers by users. There are five steps in the journey map represented in this report;

1. Awareness about the electricity bills/ suppliers
2. Idea of switching electricity suppliers
3. Gathering information for switching suppliers
4. The process of switching suppliers
5. After switching suppliers

### 1. JOURNEY MAP: Awareness about the electricity bills/ suppliers

**Research goals:** What information would help support customer confidence in switching?

#### Findings:

5 out of 6 participants said that they focus on the comparison of the electricity bills compared to their neighbor.

3 out of the 6 said that they would expect to see some kind of breakdown of unit price of electricity, transport/ provider charges.

2 out of 6 said that they would expect to see comparison of unit price of electricity to other suppliers but they were not sure if that is even possible due to the tie ups between provider and supplier.

#### Analysis:

Participants like the break down and easy to understand format of the costs involved. They do like the comparison charts of electricity usage and would also expect the same to compare the supplier's unit pricing.

#### Participant comments:

J2 - “Almost all of electricity cost seems to go to transport/ provider”

S1 – “The charts comparisons with neighbors is helpful”

**Recommendation:**

Provide users with a clear break down of the information on the electricity bills and information about comparison with other suppliers rather than just neighbors. Provide tips to save energy based on the trends and general information about the electrical appliances.

**2. JOURNEY MAP: Idea of switching electricity suppliers**

**Research goals:** What are the key reasons that residential customers resist switching suppliers?

**Findings:**

3 out of 6 participants haven’t thought of switching their electricity suppliers due to lack of knowledge about other suppliers and their pricings.

3 out of 6 participants said they came to know about other suppliers through their friends or neighbors.

2 out of 6 participants said that they came to know about other suppliers through mail solicitation but never considered due to lack of trust on the company and their services.

4 out of 6 said that they would make a switch if the unit price is low while not compromising on the quality of service and if the supplier can clearly show why their price is lower compared to other suppliers.

3 out of 6 said that they would switch the supplier if the source/ supplier are from green energy and cost with the average unit price of their region.

**Participant comments:**

J3 – “One of my friends told me that they switched to a new supplier. Other than that I have no idea about other suppliers out there”

S1 – “I wouldn’t switch unless it’s offers me anything different from the current such as green energy sources or such”

**Analysis:**

Based on the observations, participants, the major reasons for not switching the suppliers have been

Lack of information about the suppliers in the region

Trust about the supplier companies and their services

Most of the information is communicated and received by the participants through “word of mouth”.

**Recommendations:**

Currentchoice.com should aim at encouraging their users to share their experiences to their friends through “word of mouth” or social media about the new supplier or their switching process through their website.

Detailed information about the supplier, their unit pricing, costs and services should be clearly conveyed to the users.

Customers are inclined towards signing up for green energy sources if they are within reasonable limits of the average unit price in the region.

### **3. JOURNEY MAP: Gathering information for switching suppliers**

#### **Research goals:**

What information or online experience do customers need to confidently switch from their electricity utility (outside of TX) or from their legacy provider in TX?

In what format should this information be delivered -- (stories, process review, etc.) word-of-mouth, social media, PR, and news stories)?

#### **Findings:**

6 out of 6 said that they would search in google to find information about the available suppliers in the region

2 out of 6 said that they couldn't find any general information about the available suppliers in their region through google search

3 out of 6 said that they go to the website of the supplier for more information after they have heard about it through friends, colleagues.

4 out of 6 said that they would gather the information about the unit price, contract information, termination fee and process to switch.

2 out of 6 said that they would gather information about the unit price and green energy sources and its component that suppliers provide.

2 out of 6 said they would also find out if there would be any interruptions in the service during switching

#### **Participant comments:**

**S2** – “It’s so hard to dig deep into all the information and clauses that I won’t bother about switching”

**J4** – “I googled the website of the supplier my friend mentioned to look for the pricing and other stuff”.

#### **Analysis:**

Participants in general wanted to gather information about the unit price, contract information, termination fee and the process to switch. Some were interested in the knowing about the green energy component of the suppliers as well. Participants tried to gather this information through google search or the individual websites of the suppliers but weren't successful in most cases.

#### **Recommendations:**

Providing relevant information such as termination/ transfer fee involved and services provided for the users on currentchoice.com for each individual supplier would help users make their choices faster and the process of acquiring information easier. Educate the customer about the switching process and the concept of electricity provider and supplier.

#### **4. JOURNEY MAP: The process of switching suppliers**

**Research goals:** What information or online experience do customers need to confidently switch from their electricity utility (outside of TX) or from their legacy provider in TX?

##### **Findings:**

5 out of 6 mentioned that they would go to the website of the supplier and provide basic information such as current account number, address, SSN and the whole process of registration to take 10 – 15 mins.

1 out of 6 mentioned that they would switch the suppliers by calling the supplier.

2 out of 6 mentioned that they would expect the suppliers to take care of the participant's termination process with the current supplier since it can be time consuming.

3 out of 6 mentioned that they would expect the website to find out the provider and current supplier details once they put in their zip code and address to make it easy on the user.

6 out of 6 expected the actual switching to take about 1 – 2 weeks.

1 out of 6 showed a video on a supplier website about the process to switch and felt it is an easy way to understand the process than reading.

##### **Participant comments:**

**S1:** "I think it should be easy enough to put in your details for the registration on the website"

##### **Analysis:**

Most of the participants were comfortable going to a website to register with the new supplier but they want the whole process to take as less time as possible by taking care of termination process with the current supplier and registering for the new. Most participants expected the process of switching to be seamless.

##### **Recommendations:**

Information about the providers in zip codes served by currentchoice.com should be used to make it easier for the user to change the suppliers. Inform the user with the time frame in which the switching occurs. Provide support for users with the termination process with the current supplier. Update the users on the status of the switching process.

Present the information about the process of switching through video and graphics which can easily understood rather than plain information.

## 5. JOURNEY MAP: After switching suppliers

**Research Goals:** What are user's expectations from 'currentchoice.com' after the service is used for switching suppliers?

### Findings:

4 out of 6 mentioned that they would like the electricity provider or supplier to provide information /tips about saving energy or information about high energy consuming appliances in general.

2 out of 6 mentioned that they never expected anything special from energy providers except for timely updates on the status if there are any outages or service repairs.

5 out of 6 mentioned that they would expect the response time to the repairs to be within 24 hours and with status updates.

1 out of 6 mentioned that they would like to have an app from the supplier or provider which can provide information about their energy consumption and current offers by the supplier or other suppliers.

2 mentioned that although they expect information from the supplier they don't want to be spammed with emails.

### Participant comments:

**S2:** "How about a smartphone app to show my usage, offers on plans and alerts!"

**L2:** "I just want them to update me prior to any maintenance work if any and update on the status of completion."

### Analysis:

Participants in general expected the supplier to provide educational information about energy savings and offers on plans or pricings. The participants wanted this information to be easily accessible through sources such as mobile apps and alerts in emails. Some of the participants did not have a clear understanding of the scope of the service provided by electricity providers and suppliers which caused confusion in their expectations from suppliers.

### Recommendations:

Provide users with tips and information about offers once or twice a month or through mobile alerts or apps. Update the users on status in case of maintenance and repairs. Provide an accessible time frame for the users to allow maintenance personnel to repair any local problems within the house.

## Key takeaways:

### Barriers to switch:

Lack of information

Lack of Trust on the suppliers,

Motivation

Ease of the process

### Recommendations:

Educate the customer about the suppliers and the differentiation between suppliers and providers.

Provide information about suppliers through feedback from existing customers to increase trust.

Provide flexible plans and contracts with green energy components and support for motivations

Make the process of switching easy by making use of information about existing providers in zip codes and support throughout the process and after the switching process.

## Change in personas:

Some minor changes had to be made to the current personas based on the participant pool observed.

**Participants who are inclined towards saving energy are also motivated by green energy sources which is associated with Sarah's persona.**

**People who know about the difference between providers and suppliers which can be associated with Sarah's persona and people who don't which can be associated with John's persona.**

**Sarah – the energy saver**



**Defining quote:** “I’ll be willing to switch my energy supplier today if someone can provide me an efficient way to save energy and related tips to do so.”

- Sarah often works from home and a regular user of ecommerce services.
- She likes to be efficient in performing her activities both at work and at home.

- She owns a 3 bedroom house for about 15 years and has changed her energy supplier a couple of years back.
- She tries to save energy by buying energy efficient appliances and by minimizing the wastage of electricity.
- She has good understanding of the electricity providers and suppliers work and their scope of work.

**Motivations:**

- To have constant check on the energy utilization and recommendations
- To perform the task of switching quick yet reliable
- Contribute to green energy

**Barriers:**

- Lack of collective information on various components of the energy utilizations
- Lack of trust on firms providing the facility to switch

**John – The money saver user**



**Defining quote: “I never thought of switching but will try it out, If someone can tell me how it’s done and convince me that process will save me money.”** John is a very moderate user of online services and feels uncomfortable performing transactions online.

- He owns a 2 bedroom condo for about 5 years and has never changed his energy supplier.
- He never pays attention to his energy bills although he most often relies on the suggestions given by his friends and colleagues regarding the utilities of the house.
- He does like to save some money if it possible but never thought in terms of energy bills.
- He doesn’t have much information about electricity providers and suppliers.

**Motivations:**

- To reduce electricity bills
- Switching providers with a clear understanding of the process and the value addition.

**Barriers:**

- Lack of knowledge on the process of switching energy supplier
- Lack of understanding on the comparison of the energy bills
- Minimal use of online services for ecommerce