



# DHS CX

## Leadership Observation Initiative

## Ground Rules and Expectations (Modify for your session)

### Sessions like these are for you to learn about customers' experiences

Please don't use the session as an audit or judgment of CX Hosting Team's performance. For these observations to be an ongoing and fruitful collaboration, it is essential that staff feel comfortable with leadership's presence, and focus on the customer rather than you. This way, teams can run a session as they normally would and will not feel compelled to put on a show for you.

Some of the participants may be DHS staff as well. Most likely they will not be aware of your position as a leader during the observation. You must ensure their anonymity and protection should they say anything critical of leadership or the service. The design or service is the subject of the testing, not the participant. You should use these sessions to listen for opportunities to revise processes, policies, or programs.

### You are riding along, as a guest observer

We recommend that your formal title be withheld from the introductions. Instead, the moderator will describe you as a "guest observer" and may leave you un-named to avoid a chance of intimidating participants and influencing their responses.

When joining the session, it is okay to have your video on for the introduction (though it is not necessary) but after the introduction your video and microphone should remain off.

Please don't interact with participants during the session.

The team's moderator or facilitator is in charge of the session. You are present to listen, observe, and learn. The moderator may invite follow-up questions at the end of a session, but we recommend that you listen, only.

### Things to look out for when observing

Listen for questions that participants have about the tool they are interacting with or the process they are in. Note things that are frustrating or confusing for the participant, anything that is surprising to you, and questions you have about the method of the session, the process or tool they're interacting with, and what your big take aways are from observing.

### If you have questions and comments

If you have a CX translator assigned for the session and you need assistance or an explanation, please communicate with them discreetly so as not to disrupt the activity. If you are observing remotely, have a separate chat open with them and route your communication there.

### Stay to debrief with the team

After the session's activity has concluded with the participant, teams typically hold a short debrief in which the team discusses notable events from the activity and their initial insights. This is a key part of the design process. Depending on the type of observation this is, it may be appropriate to participate in the discussion. Either way, please stay to observe this part of the process.

### Be ready with your big takeaways

After the debrief, the facilitator of the session will request feedback from you regarding your takeaways from the observation session and process. This is your opportunity to provide your thoughts on what you gained from this session and your perspective as a participant in the observation initiative. We will use this information to gauge the initiative's effectiveness and to drive improvement in areas that need further refinement.

If you are unable to give feedback immediately after the session, then the Facilitation Team will reach out with a feedback prompt.

