



DHS CX

Leadership Observation Initiative

Observer Briefing Example

Case Management Application

Within our portfolio, our application is a case management system used by new customers to prep for form submissions and approvals.

Objective: Leadership Observation Session of the form submission process.

Methodology: User / Prototype Testing

Date and Time: November 17, 2022. 1:00pm

Prototype Development and Testing

Having recently completed a round of discovery research, synthesis, and ideation, our team is moving into prototype development and testing. We've learned about the big problem areas and have ideas for how we can solve them, but now need to test those ideas to understand if they fit the expressed needs of users involved.

These sessions will last 1 hour and consist of prototype testing where we will posit certain scenarios to users (e.g. "How easy was it to submit the form") and see if they are able to navigate the prototype to complete the task at hand. Our goal here is not to make a perfect prototype, or have users "ace" the test, but to use prototypes as a tool for learning more about this space as we move towards a solution (aka "test and learn").

Research Brief

One of the main user pain points right now is user error when submitting a form. There are many issues with users skipping over fields within the forms pages and inputting incorrect data. The incomplete forms often causes delay in user submission and extends the approval periods. The current system frustrates and overwhelms administrators who don't want to have to deal with the data management.

What we aim to achieve is a simple, clean, single source of form submission and approval workflow management for our users. We believe that our solution can greatly improve the lives of our users by freeing up time and mental bandwidth used to track cases so that they can focus on the true mission that matters here.



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