

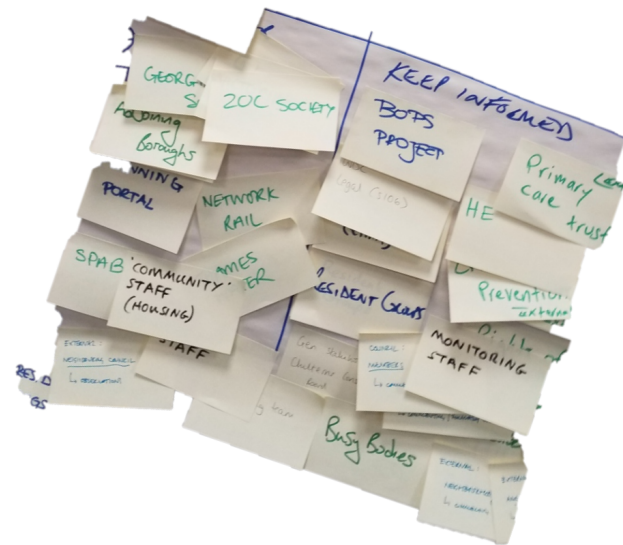
5 User research

Our Approach to Learning

Early sessions included Stakeholder mapping workshops. This helped us understand our different types of stakeholder and our priorities for engagement.

Our early workshops showed us that there was more to learn than we realized – and that some of our assumptions may not necessarily have been accurate. We also realized whilst we may have thought we were the experts working in a planning environment – we didn't necessarily know what users really needed or wanted.

This led us to realize we needed to engage a professional User Researcher to give added insight.



Testing Assumptions

Our early sessions with our User Researcher started with journey mapping with officers going through the existing process as well as the early iteration of the solution.

Officers were the only ones with a thorough understanding of the information required, so their early feedback was essential. They could find the holes in the service.

We conducted one-to-one interviews and group workshops with planning and technical officers across five authorities. We also asked members of the core project team to review and mark-up the outputs.



Priority Mapping

The partners also mapped priorities and other considerations.

These gave us direction in our user research as well as ensured we sense checked the rationale for what we were developing.

For example, we realized that user trust in our system was going to be critical for uptake.

We also identified the need to avoid building existing bad practice into the new system.



RIPA Knowledge Kanban Board

What we don't know (backlog)

These are the questions we don't have an answer to yet. (Purple labels. Also, Yellow for new questions yet tbd)

What in the existing system is inherited bad practise?

Will this replace or support the existing situation?

What do you need to know?

Do you need this?

Where did you seek information before preparing your application?

What do you feel would still need to be explained?

Is there a rule for when certain info is/is not required?



Testing with users

In Alpha, we:

- Surveyed 96 research volunteers on their planning application past experiences
- Conducted 13 usability test sessions with 3 distinct user groups. This comprised 6 agents, 5 applicants and 2 technical officers.
- Iterated and tested 3 versions of the RIPA prototype from paper to digital
- Produced 263 lines of consolidated usability test findings



Testing with users – how we did it

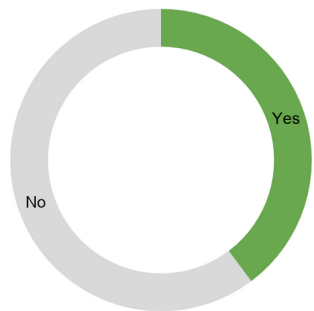
We used a screening approach to select users from our volunteers to ensure a wide range of experience and type. Our User Researcher led the interviews, taking users through the prototypes, whilst observers took notes of how the user interacted with the prototype and what they said.

After the user interviews were completed, the User Researcher collated the recorded information by different screens and then analysed each one.

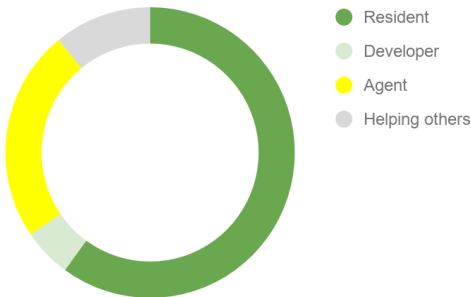
What are they doing/what do you observe	What are they doing/what do you observe
5b Looking at the question wording	Would rephrase the sentence around the red line. Would rephrase "Does the picture above clearly identify your property or the property subject to your application?" The words 'proposal' and the words 'within the red line'. Proposal - would guess it was about the application but it's a confusing word the words 'red line' is confusing - probably associated with the word 'red'
5b If you didn't agree with the boundary	Suddenly noticed that there was an option on the
5b What would you expect to do next?	Click continue and see about the works.
6 Do you think this relates to what you want to do?	Thought yes, saw it showed all the options of the works you want to do. In this case the task said
6 What expect to see next?	I would expect click on continue and move into it. I would expect it to ask me more info. It's not asking enough info at this stage - how far go, how high, I'm going to annoy my neighbours! page tells the participant that they have to fill in a
7 Taken to My Application page	
7 If it were designed to be sequential	I see it as a sequence but don't know.
7 Are we showing you your progress	Yes - I see the status bar percent progress bar to where I am
topic or step in the journey	What are they doing/what do you observe
	As an applicant the participant would want to see a little popup that shows the schedule of fees. Seeing it all in a table if you clicked a help button. Participant thought 'how was this calculated' it would relate to things like VAT etc monetary - with the help button would expect to see the table of fees / statutory info.
	Participant thought going to next page - only gave one option to pay for the fee so can only do online payment.
9 If you had started the work what would you say yes.	I would expect to be asked details/information - we don't seem to be getting there yet! Participant found it amusing
10 About the works - on selecting yes, the date appears? Is this date the sort of info you can easily recollect?	Understood the question - guessed it meant what date the works start. Expect to put a date when the builders came in when the whole thing started. Physical / tangible works. It's probably not so easy to remember the day exactly when you started the works. Can roughly say 'oh we started in January' might stick a date to what is close.
10 what next	still not been asked to upload drawings and the kind of work I want to do. I am expecting to provide detailed info of kind of work I want to do. I'm doing an extension so I expect to be asked the details

User testing survey

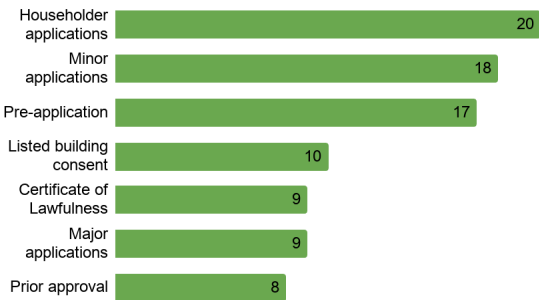
Have you submitted an application in the last 3 years?



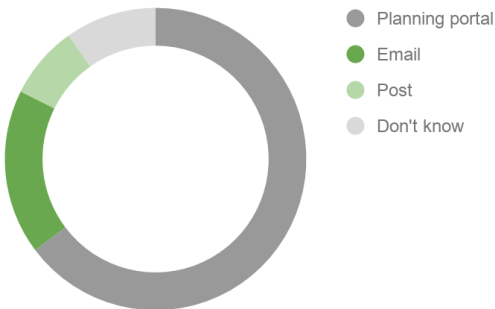
If yes, in what capacity did you submit?



Types of application submitted



How do you usually submit planning applications?



Do you have any additional accessibility needs?



Based on 96 responses

User persona: applicant

Hassan, a homeowner



"I haven't done this before, so I want to see what's required."

About

- Has never, or rarely, submitted an application before
- Low to mid digital skills
- Has limited time
- Doesn't understand or speak planning 'jargon'

Key insights

- Would like to see what the fees will be and what documents will be required as early on as possible.
- Would like to see how far through the process they are.

User persona: agent

Alex, an architect



"I usually know why I'm being asked for a particular piece of information, so I will find it frustrating if it asks for something I don't think is relevant"

About

- Several years experience of preparing & submitting planning applications on behalf of clients.
- Mid to high digital skills.
- Submits ~5 applications per year

Key insights

- Would still like to upload all drawings in one go at the end.
- Wants the flexibility to upload additional information beyond the basic requirements in order to make the case

Paul, a planner



"I want to be able to do more valuable planning work and less admin."

About

- Highly knowledgeable about the planning process
- Low to mid digital skills
- Workload is target driven
- Fluent in planning 'jargon'!

Key insights

- Would like to be able to identify and monitor applications which are invalid and use that to help identify a solution
- Would like to accurately validate applications so that they can reduce the number of angry resident calls

Vi, a validations officer



"Something that makes submitting an application easier for customers could also make my job easier"

About

- Is the gatekeeper to the planning process
- Low to mid digital skills
- Needs good planning knowledge to do the job well

Key insights

- Applications from inexperienced customers often have the most errors
- Fewer invalid applications submitted should mean fewer difficult calls with agents.

User stories

As an applicant I want to be told what will be required so I can see how much the process will cost

As an applicant I want to spend the least possible amount of time submitting an application so I can get on with my life

As an applicant I want to avoid my application being sent back so I can avoid frustrating delays

As an applicant I want to complete the whole process in one place so I don't have to hunt around multiple websites, doing research

As an applicant I want the rules of the service to be transparent so I can trust it

As an applicant I want to be able to leave and come back to my application so I can complete it over multiple sessions

As an applicant I want to be able to share the application with my agent so they can do some of the work for me

As an applicant I want to be able to see anything my agent has filled in on my behalf so I can check that it's correct

As an applicant I want to be able to do some or all of the work myself so I'm not paying my agent to do something I could do

As an applicant I want to use the same login I use for other council services so I don't have to remember multiple passwords

As an applicant I want technical terms to be explained so I feel empowered to make informed decisions

As an applicant I want to be kept up to date about the progress of my application so I know when I can expect a decision

not in scope

As an agent I want to manage multiple applications at once so I can see all my live applications for all my clients

As an agent I want to be able to share the application with my client so they can pay the fee

As an agent I want the process and requirements to be as standardised as possible across all councils so I don't have to re-learn the process every time

As an agent I want my client to be notified when an application has been successfully submitted so I can invoice them

As an agent I want to be able to download my application after I have submitted it so I can keep a copy

What users liked about the prototypes

"The design looks much simpler than Planning Portal"

"It doesn't require technical knowledge to use it."

"It's great that it tells you the constraints – because some people may not know to look them up"

"There's always tension in the planning application process – this makes it much more user friendly."

"Everything is where you'd expect it to be"

"It looks very simple and easy to use."

"This seems more streamlined, unlike Planning Portal where you (have to) fill out the application physically first. This takes you through step by step."

"(the form) is very intuitive"

"It doesn't require technical knowledge to use it."

"The steps navigation is very helpful"

"Seeing an overview showing the completion progress is useful"

Explore the detailed user research findings [here](#)

User Insights

1 Visibility

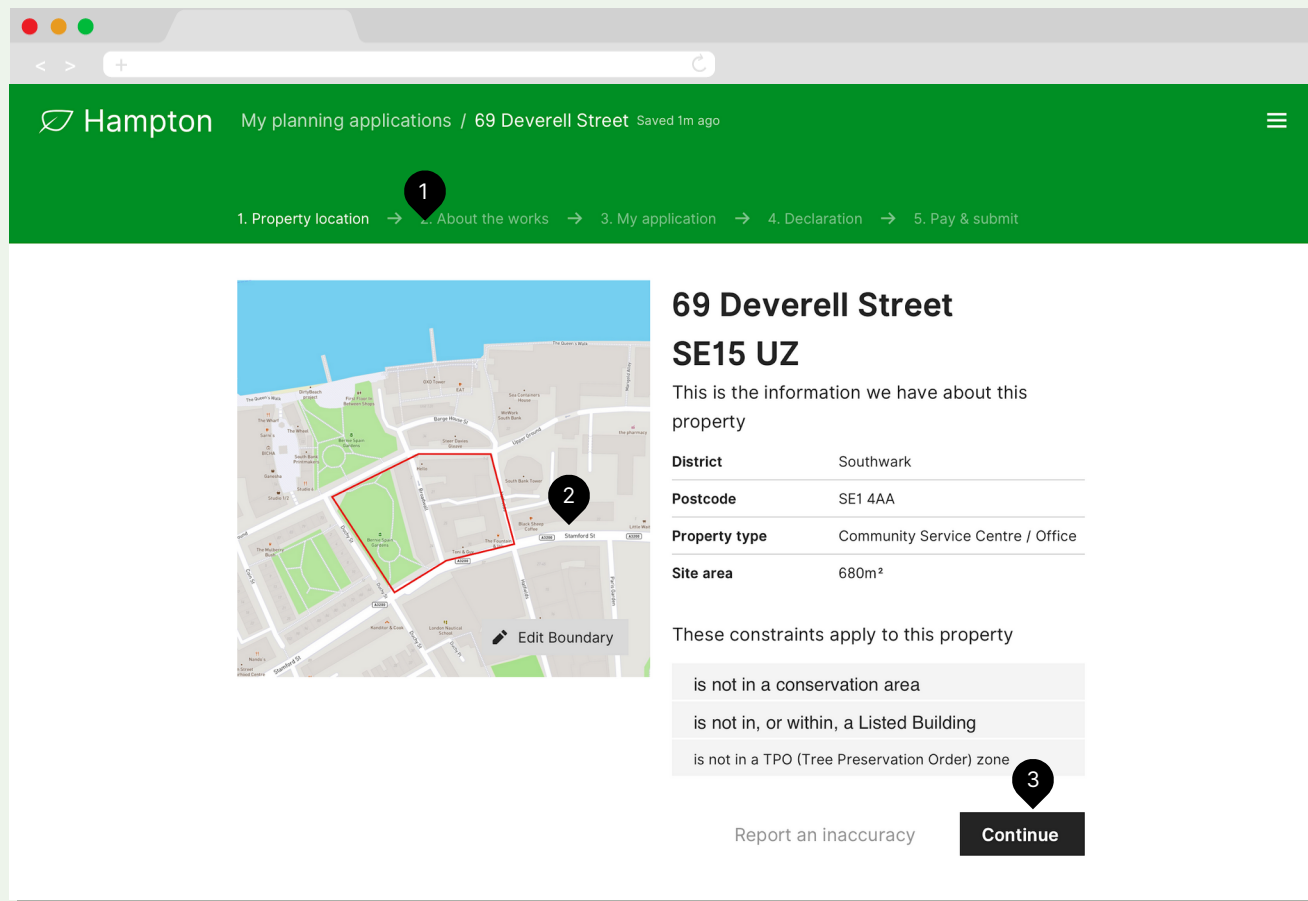
Users found the navigation steps difficult to read, and weren't sure whether it was clickable or not.

2 Visibility

Users wanted the map to be as big as possible

3 Early information

Users wanted an extra step outlining what the fee and document requirements are likely be up front. Whether this is possible or not will require further exploration.



User insights

1 Naming

Users found the term 'in progress' confusing, leaving room for confusion as to whether it has been submitted or not.

2 Sorting

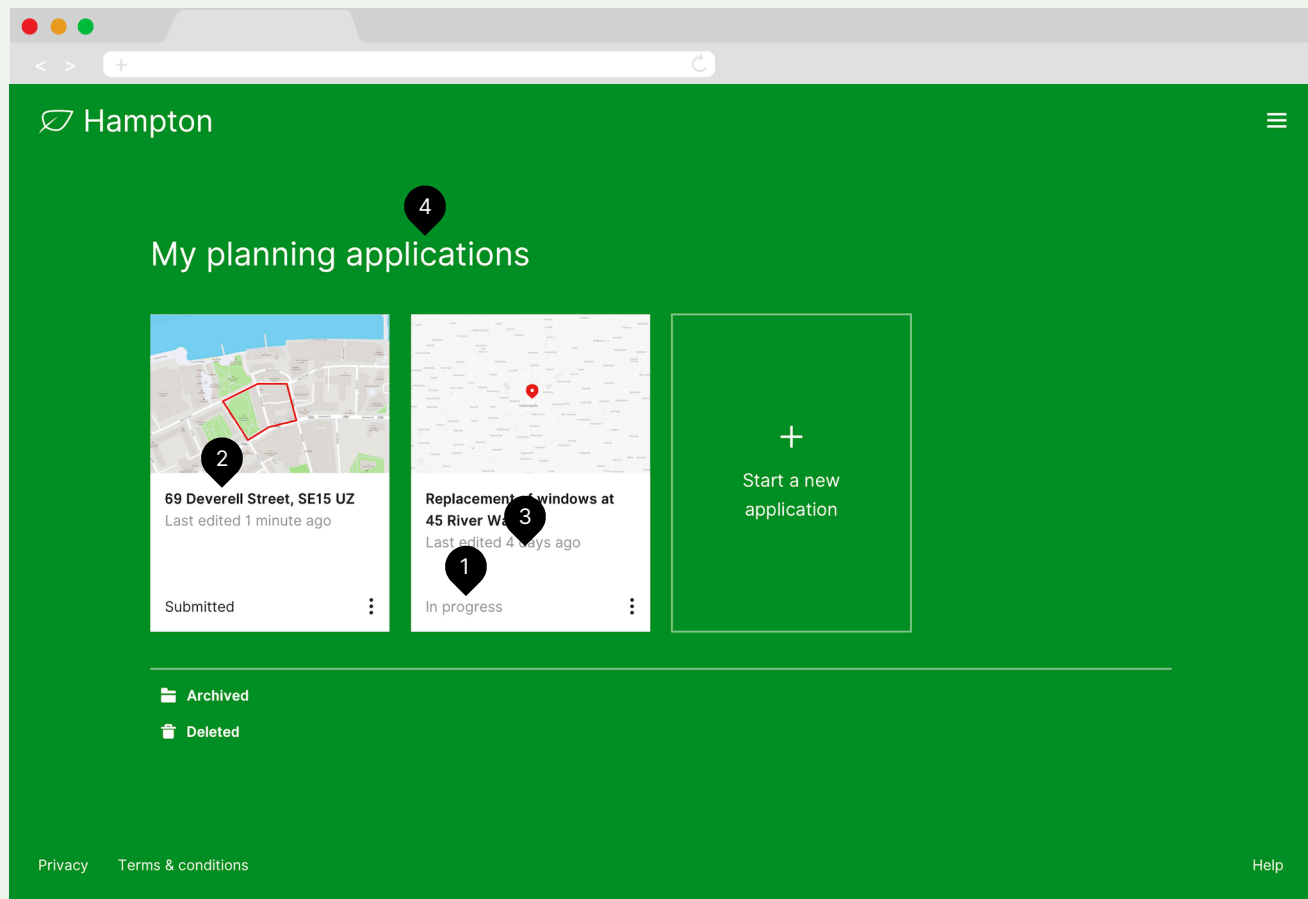
Some users wanted to organise their applications by works, others by address

3 Search by reference

Agents wanted to see and find by the application reference.

4 Follow

Users would like to be able to follow the progress of their application here



User insights

1 Saving changes

Users weren't sure whether they need to save their changes, or whether changes were being saved automatically, so we added a 'last saved' indicator.

2 Progress

Users liked the progress bar but weren't sure what range of content it covers.

3 Affordance

Some users weren't immediately aware whether the Section titles were links, or just a list.

The screenshot shows a web browser window displaying the Hampton planning application interface. The browser's address bar shows the URL 'hampton.gov.uk/my-planning-applications/69-deverell-street'. The page has a green header with the Hampton logo and the text 'My planning applications / 69 Deverell Street' and 'Saved 1m ago'. A navigation breadcrumb trail shows the steps: 1. Property location → 2. About the works → 3. My application → 4. Declaration → 5. Pay & submit. The main content area is titled 'My application' and includes a progress bar showing '50% complete'. Below the progress bar is a list of sections with their completion status: 'About the property' (Complete), 'Ownership' (Complete), 'App details' (Complete), 'Agent details' (Complete), 'Materials & appearance' (In progress), 'Heritage' (In progress), 'Access, transport & parking' (In progress), and 'Daylight & sunlight' (Not started). A 'Continue' button is at the bottom.

Hampton My planning applications / 69 Deverell Street Saved 1m ago

1. Property location → 2. About the works → 3. My application → 4. Declaration → 5. Pay & submit

My application

Please complete all sections

50% complete

About the property	Complete
Ownership	Complete
App details	Complete
Agent details	Complete
Materials & appearance	In progress
Heritage	In progress
Access, transport & parking	In progress
Daylight & sunlight	Not started

Continue

User insights

1 Content order

Previously there were questions here about eligibility for exemptions – but users couldn't see the connection, so we moved those questions to the main form.

2 Auditability

Users wanted to be able to see how the fee was calculated before proceeding to payment.

3 Workflow

Agents wanted to be able to invite their clients to do only the payment step.

4 Payment

Some users wanted to be able to pay by BACs transfer or using Paypal or another payment method.

The screenshot shows a web browser window displaying the Hampton planning application interface. The page title is "My planning applications / 69 Deverell Street" with a "Saved 1m ago" indicator. A green navigation bar at the top contains the Hampton logo and a breadcrumb trail: "1. Property location → 2. About the works → 3. My application → 4. Declaration → 5. Pay & submit". The main content area features a light green box with the text "The planning fee for this project is £402". Below this, a link "How was this calculated?" is visible, accompanied by an information icon. Four numbered callouts (1, 2, 3, 4) are overlaid on the page: callout 1 points to the breadcrumb trail; callout 2 points to the "How was this calculated?" link; callout 3 points to the "Enter card details" section; and callout 4 points to the "Card security code" field. The "Enter card details" section includes input fields for "Card number", "Expiry date" (split into "Month" and "Year"), "Name on card", and "Card security code". A "Pay & submit" button is located at the bottom of the form.

Hampton My planning applications / 69 Deverell Street Saved 1m ago

1. Property location → 2. About the works → 3. My application → 4. Declaration → 5. Pay & submit

The planning fee for this project is
£402

[How was this calculated?](#)

Enter card details

Card number

Credit and debit cards accepted

Expiry date

Month Year

Name on card

Card security code

Pay & submit

User insights

1 Review

Users wanted the opportunity to review the application before paying and submitting, and to be able to view the full application anytime afterwards.

2 Naming

Users wanted to be explicitly reassured that their application has been submitted.

3 Copy

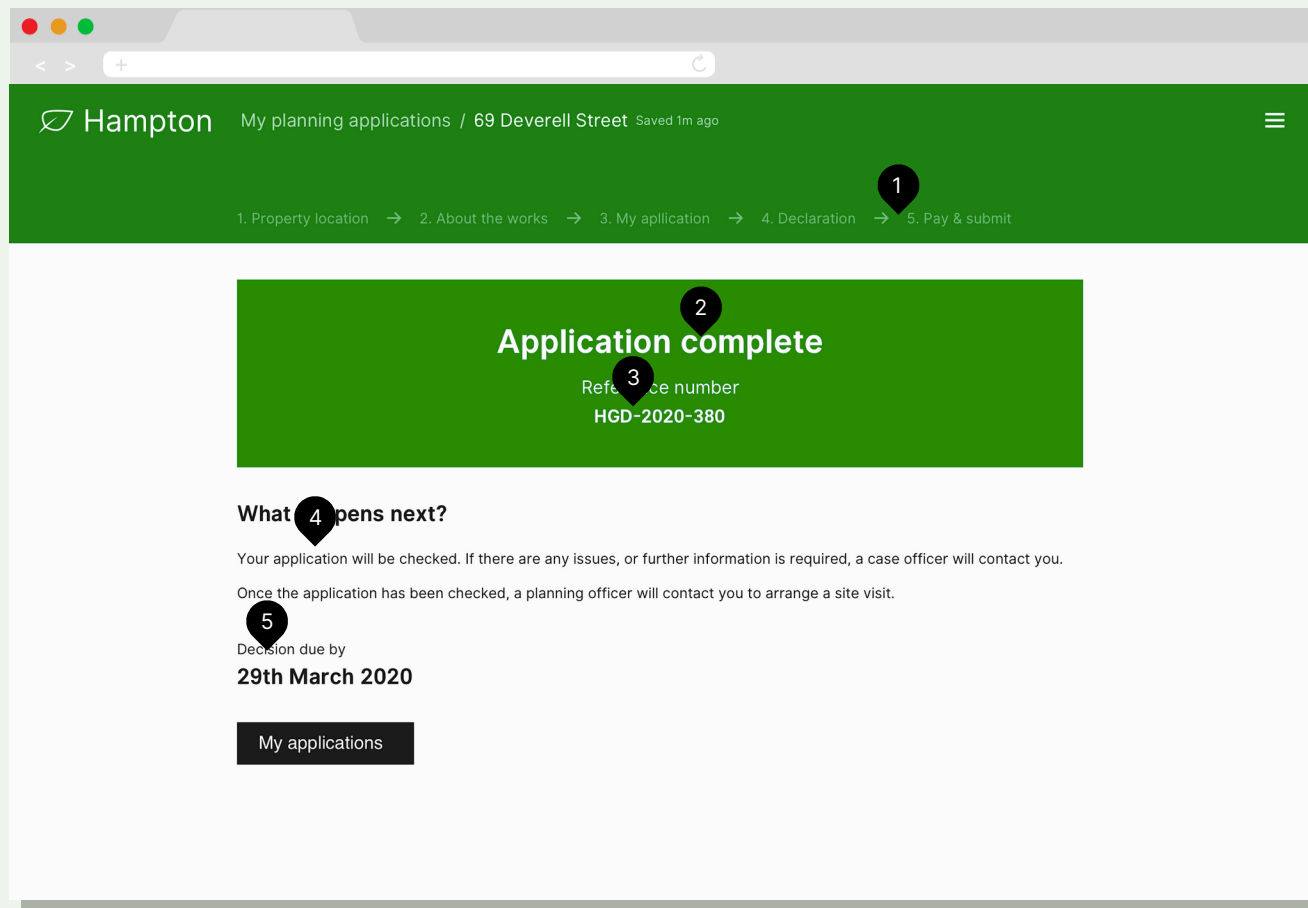
Agents wanted to be able to easily copy the application reference.

4 Notifications

Users wanted to know that a confirmation had been sent by email.

5 Expectations

Users wanted information about the timeline (although it probably won't be a decision date yet).



What we learned

<p>Progress bar If possible, the progress bar and service steps navigation should be combined, made more visible and repositioned. This will also allow the navigation bar to be smaller.</p> <p>Review A 'review before submitting' step should be added with a prompt to invite an applicant.</p> <p>Download application After submitting, users should be able to return to view and download their application anytime.</p> <p>Upload stage Uploading drawings and reports may come as an additional stage.</p>	<p>'Started' not 'In progress' Use the term 'started' or similar instead of 'in progress' for applications and sections of an application.</p> <p>Ask about expectations Despite the limitations of paper prototypes, asking users about their expectations allowed us to gain insights far beyond what we had expected.</p> <p>Additional documents upload Even where asking for data instead of documents, give users the option to upload additional documents if they wish.</p>	<p>Site boundaries Rather than inferring site boundary from property boundary it may be better to make all users draw site boundary and confirm that it includes all works.</p> <p>Unlisted addresses Create a clear route for properties with no address, or for which the address is not listed.</p> <p>'Free go' rules Include each council's 'free go' rules to the section on linked applications and factor into the fee calculation.</p>	<p>Preview stage If possible, a step could be explored giving users a preview of likely fee and document requirements before they fill-out the application.</p> <p>Test early, test often Most importantly, we learnt that at every step of the way user research is crucial – however much you may think you know what would be best!</p> <p>GDPR interpretation obstacles Process of getting volunteers was hampered by a very strict GDPR interpretation in some councils.</p>
--	--	--	--