Strategic Program Management Office
Veterans Benefits Administration

VBA VSignals Service Recovery Program: Thematic Analysis

Duration: 30 minutes

Audience:

This lesson is intended for Service Recovery Analyst (SRAs)

Purpose

The purpose of this training is to provide SRAs with a foundational knowledge on how to review and examine VSignals survey data, survey respondent feedback from service recovery calls, and free text (as applicable) to recognize common themes - topics, ideas, and patterns of meaning to identify pain points, bright spots, insights, and trends.

Objective

Upon completion, participants will be able to:

- Conduct data synthesis.
- Identify common themes, topics, and ideas recurring in service recovery feedback and free text responses, if applicable.
- Apply analytical techniques to recognize patterns of meaning within the data.
- Utilize insights gained from the data analysis to propose strategies for addressing Veteran insights.

Introduction to Thematic Analysis

Thematic analysis is the process of collecting, organizing, and interpreting data to generate insights and support decision making for process improvement. It can assist with improving the customer experience by measuring and monitoring the perception of service across business lines and program offices (BLs/POs). Thematic analysis enables BLs/POs to segment and categorize customers based on their demographics, behaviors, preferences, and feedback. It can also be used to identify and address the root causes of customer complaints, issues, and dissatisfaction. Moreover, it can help to discover and anticipate customer needs, expectations, and trends, as well as test and evaluate different service strategies, policies, and improvements.

With the use of surveys and service recovery (SR) calls, BLs/POs can conduct analysis for customer service to propose better methods of conducting business based on customer feedback. Surveys and SR calls can help with the tracking of customer opinions and sentiments, extraction of text data from free text, and create charts and dashboards for reporting.

The process of interpreting data will be subjective and reliant on the SRA's judgement; BLs/POs have flexibility in interpreting the data. As such, to avoid misinterpreting data, SRAs need to be subject matter experts in the BL/PO with regards to systems, procedures, operations, laws and regulations impacting benefits and service delivery. Similarly, SRAs must be able to separate the literal meaning of free-text versus nuances of survey respondent's meaning (subtext, definitions, and assumptions), and must be able to properly categorize the underlying data.

Purpose of Thematic Analysis

The purpose of thematic analysis is to understand the customer experience and transform raw data into insights which result in strategies, products, and services that will help with the delivery of benefits or services. BLs/POs may do so by:

- Identifying patterns or themes within the qualitative data.
- Gaining insight into participants' experiences, perspectives, and beliefs.
- Providing rich, detailed descriptions of the qualitative data.

Benefits of tracking customer service analytics

- **Improved customer experience**. Customers often express a good service experience makes them more likely to return for services. Analytics help you to understand customer expectations and experiences, so you can tailor services to meet those expectations effectively.
- **Identifying pain points:** By analyzing customer feedback and complaints, we can identify recurring issues and address them proactively, leading to improved customer satisfaction and trust.
- **Operational efficiency**: Analyzing customer service data allows a BLs/POs to optimize their processes, allocate resources efficiently, and enhance overall operational effectiveness by reducing rework.
- **Product and service improvement:** Insights from analytics can guide product and service development, ensuring they align with customer needs and preferences. Customers expect you to understand their needs and expectations.
- **Customer retention and loyalty:** Understanding customer behavior and preferences allows your BL/PO to design strategies that foster customer loyalty and improve trust.

Performing Thematic Analysis

Steps for Performing Thematic Analysis

To use data analysis effectively for customer service, you should follow a systematic and structured approach. Start by defining your customer service goals and objectives, such as what you want to achieve or improve, and how you will measure success.

Performing a systematic review is multi-step process, which includes the following:

- **Define the research question and objectives**. What do you want to learn from the surveys and SR calls? How will the findings help you improve your products, services, or processes?
- **Collect and transcribe the data.** Select a sample of SR calls that are relevant to your research question and objective. This may be a collection of the results from monthly or quarterly interactions.
- **Familiarize yourself with the data.** Read the annotations from SR calls and take notes of any initial impressions, ideas, or observations. Look for patterns, similarities, differences, and outliers in the data.
- **Generate an initial data set.** Assign labels to segments of data that capture their meaning or significance. In this step you will organize the data in a meaningful and systematic way. The creation of data sets reduces lots of data into small chunks of meaningful information. There are different ways to create the data sets and the method will be determined by your perspective and research questions.
- **Search for themes**. Review the data sets and group them into broader categories based on their similarities or relationships. These categories are the potential themes that answer your research question and objectives. A theme is a pattern that captures something significant or interesting about the data and/or research question. As there are no hard and fast rules about what makes a theme. A theme is characterized by its significance. If you have a very small data set, there may be considerable overlap between the previous stage and this stage of identifying preliminary themes.
- **Review and refine the themes** Check if the themes are coherent, consistent, and distinct. Make sure they are supported by enough data and relevant to the research question and objectives. You may need to merge, split, or discard some themes at this stage. During this step, you will also review, modify, and develop the preliminary themes that were identified.
- **Define and name the themes.** Once you have settled on the themes, write a clear and concise description of each theme and what it represents.

Whiteboard Sessions

Whiteboarding is a collaborative technique that involves visual brainstorming on a physical or virtual whiteboard. This approach enables SRAs to sort SR comments into common themes while capturing ideas and illustrating concepts in an interactive way, fostering creativity and participation. With the use of diagrams, charts, and visual aids, it makes complex ideas more accessible and actionable for everyone. Additionally, it builds a creative environment for problem solving and idea visualization.

Purposes of whiteboard sessions:

- **Collaboration:** Whiteboarding fosters active participation from team members. It offers a space where everyone can share ideas and feedback freely.
- **Visualization:** Writing ideas on a whiteboard helps turn abstract ideas into concrete visuals, which can help everyone understand and refine them. The visualization can help participants see how each stage in a process relates to another in sequence.
- **Engagement:** The visual nature of whiteboards helps inspire interaction and engagement from all participants. This is partly because it's so easy to contribute to a whiteboarding session.
- **Productivity**: Whiteboarding increases team productivity by capturing ideas quickly and allowing participants to focus on the ideas written down. The act of writing down or drawing on a whiteboard stimulates creativity, which leads to productive ideas.

Recommended Tool for Whiteboard Sessions

Mural is a collaborative digital workspace designed to facilitate creative and interactive teamwork. It allows users to brainstorm, plan, and organize ideas visually in real-time. The software provides a wide range of tools such as virtual sticky notes, diagrams and drawing capabilities, making it versatile for providing an intuitive and visually engaging platform for ideation and problem-solving. This capability makes Mural an excellent tool for sorting SR comments into common themes.

Mural provides a visual canvas where comments can be organized, grouped, and visually represented. This visual approach makes it easier to identify patterns and connections among comments. It also allows collaborative input where various team members can participate in the sorting process to allow diverse perspectives, ensuring comprehensive analysis.

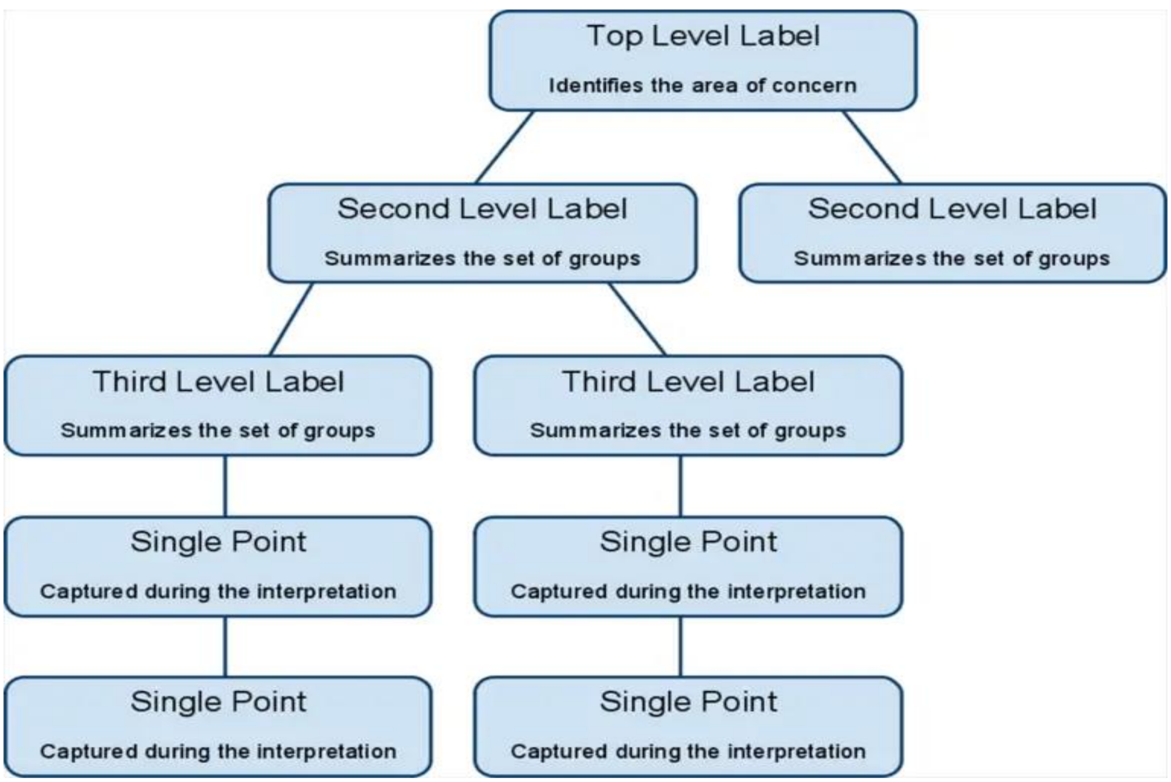
The department has an enterprise license for the software. SPMO recommends two designees per BL/PR setup Mural accounts. An account is not needed to access Mural that is shared by a facilitator.

Please click the below link for instructions on how to request a Mural account: Self-Service - DOTS: Mural Access

**The link above will navigate you to the yourIT web page. Once you click "accept", you will be taken directly to the instructions on how to gain Mural Access.*

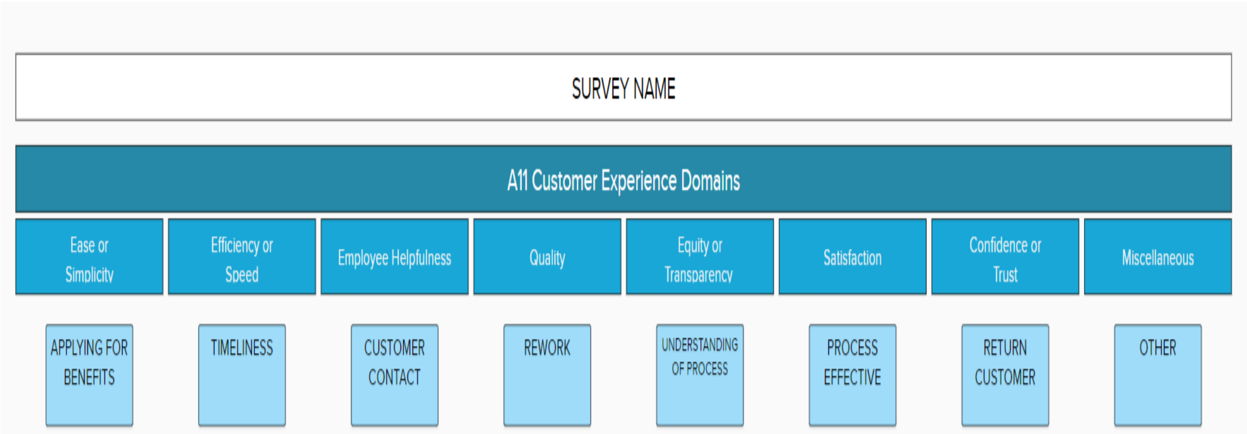
Affinity diagrams

Affinity diagrams, as pictured below, are great examples of how Mural can organize large number of ideas and/or information into groups based on their natural relationships. An affinity diagram can help identify themes and patterns in feedback, user experience, or simplify complex datasets by grouping items into themes to reveal relationships between themes that may not be obvious.



When creating its likeness in Mural, it is recommended to create a heading per survey. Headings are created by selecting the text box from the toolbar and then typing your underlying thematic topics. Once created, you will initiate the process of creating your data sets. Upon completion of your initial data sets, review each for themes.

Example:



SR and free-text comments will be sorted and placed under the corresponding theme.

Once themes are established, review the themes to ensure they are coherent, consistent, and distinct.

- **Coherent:** The theme is logical, clear, and easily understood, with clear connections between the SR comments grouped.
- **Consistent:** The theme is present throughout the collection of SR comments grouped.
- **Distinct:** The theme stands out as identifiable and separate from other themes or ideas.

Make sure they are supported by enough data and relevant to the research question and objectives. To refine your themes, you may need to merge, split, or discard some themes.

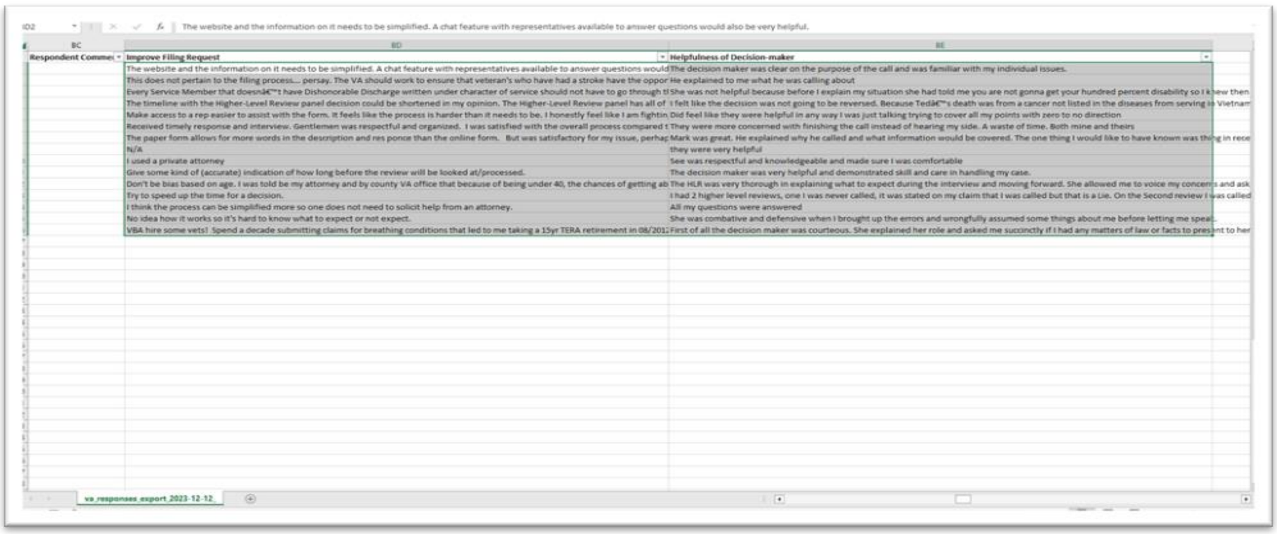
Things to consider:

- Do the themes make sense?
- Does the data support the themes?
- If themes overlap, are they really separate themes?
- Are there other themes within the data?

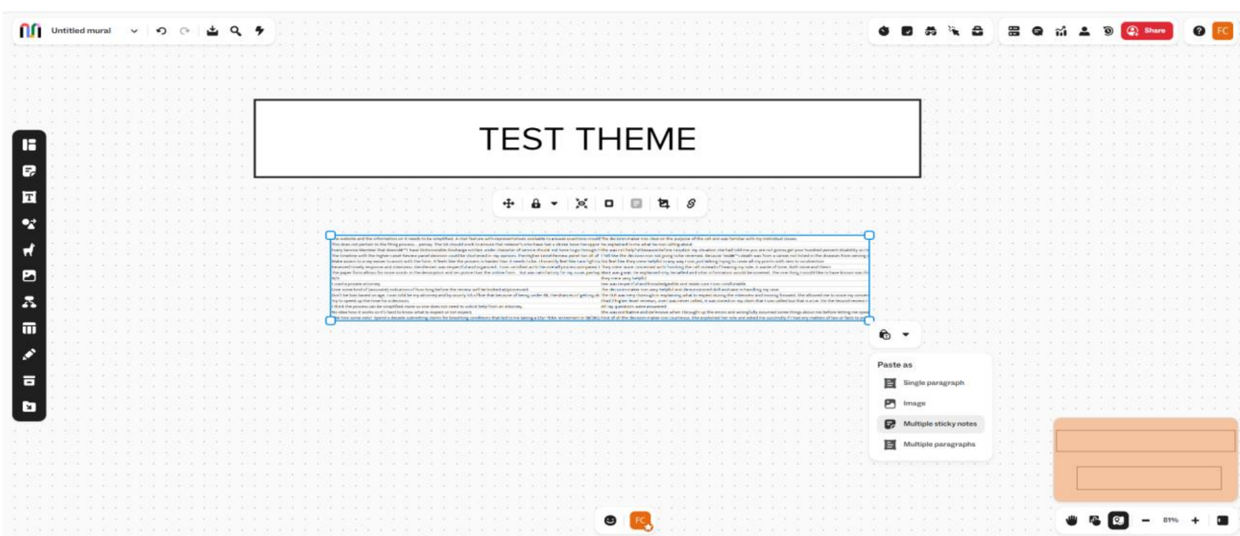
Sorting Comments

Once thematic topics are established for each survey in Mural, SR or free-text comments need to be entered and sorted.

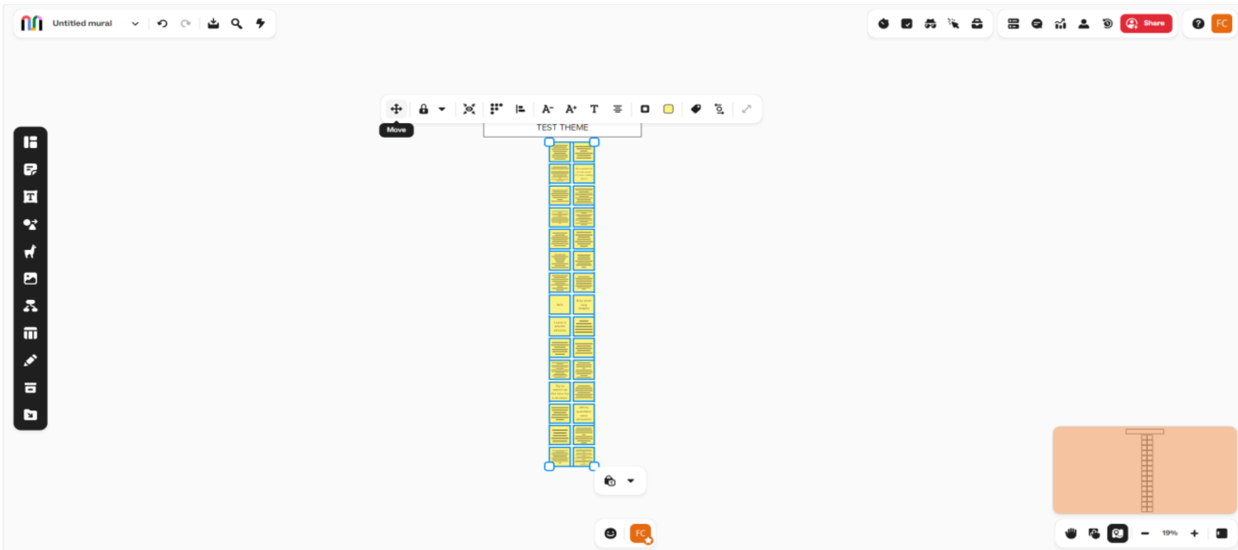
Step 1: Select and copy the information that contains the SR or free-text comments.



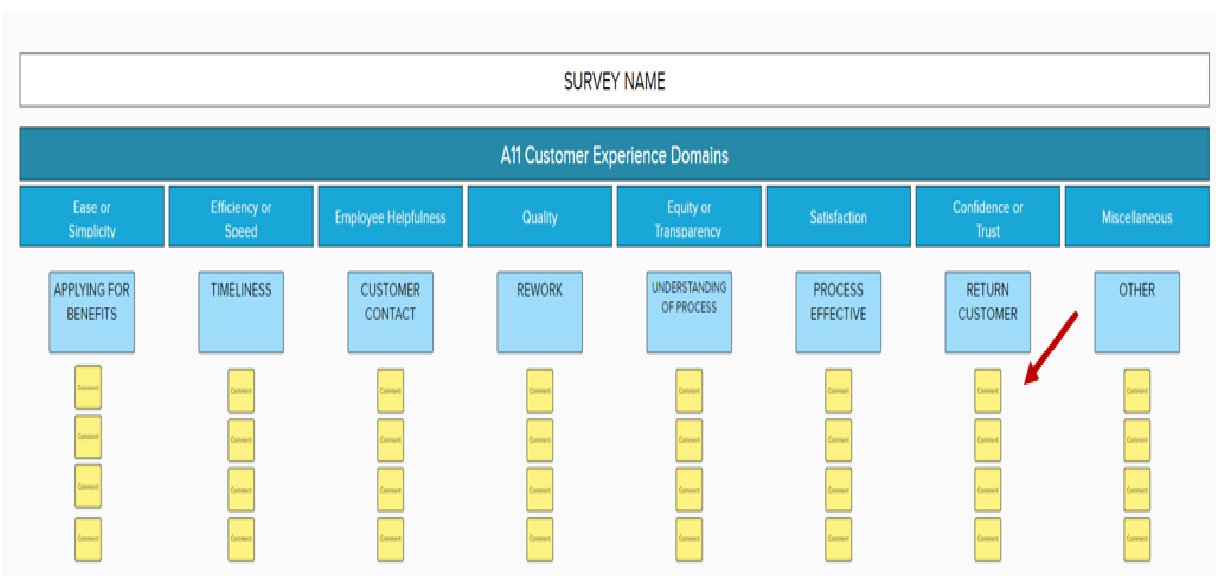
Step 2: Go to your Mural canvas and **right click and paste** your information. Click the bottom right clipboard icon and select “**Multiple sticky notes**”. Mural will automatically take the data you entered and create multiple sticky notes for each cell copied.



Step 3: Move or **arrange your stickies** into the appropriate spot on your Mural canvas.



It is recommended to create a heading per survey. [Headings]() are created by selecting the text box from the toolbar and then typing your underlying thematic topics. This same sequence is performed for the creation of the themes and any additional subcategories. Once created, you will initiate the process of creating your data sets and sorting the stickies. Upon completion of your initial data sets, review each for themes.



SR or free-text comments will be sorted and placed under the corresponding theme.

Once themes are established, review the themes to ensure they are coherent, consistent, and distinct. Make sure they are supported by enough data and relevant to the research question and objectives. To refine your themes, you may need to merge, split, or discard some themes. The themes should be coherent, and they should be distinct from each other.

Things to think about include:

- Do the themes make sense?
- Does the data support the themes?
- If themes overlap, are they really separate themes?
- Are there other themes within the data?

Step 4: Repeat this process for each topic. It is a best practice to conduct this activity regularly so you can be aware of emerging issues or Veterans that may require immediate assistance.

Step 5: Start a new Mural for each new quarter to keep data volume manageable.

Insights & Opportunities

An insights and opportunities session is a quarterly meeting where BLs/POs review customer feedback to uncover valuable insights and identify actionable opportunities for improvement. The goal is to analyze both qualitative and quantitative feedback, to understand customer behavior, preferences, and pain points. By doing so, BLs/POs can make informed decisions to enhance the customer experience, innovate product offerings, and refine services.

To run an effective meeting for an insights and opportunities session on customer feedback, here are a few general guidelines:

1. **Prepare the Agenda**: Clearly define the objectives of the meeting and list the key points of discussion.
2. **Select Participants**: Invite subject matter experts who are directly involved with the various areas of your BL/PO services to obtain diverse perspectives and can contribute valuable insights.

3. **Distribute Pre-Reading Material**: Share the customer feedback data with participants beforehand and provide note-taking materials to manage expectations.
4. **Facilitate Open Discussion**: Encourage participants to share their interpretations of the feedback and discuss potential implications.
5. **Document Key Points**: Record insights and suggestions that emerge during the discussion for later reference.
6. **Brainstorm Opportunities**: Collaborate to generate ideas for leveraging insights to create value for customers.
7. **Assign Action Items**: Decide on the next steps and assign responsibilities to ensure follow-through.
8. **Set Deadlines**: Establish a timeline for when actions should be completed and when to reconvene to review progress.
9. **Summarize and Share**: At the end of the meeting, summarize the key outcomes and share them with participants and leadership.

The effectiveness of an insights and opportunities session hinges on active participation, clear communication, and a commitment to action based on the insights gained. Keep the session focused by always steering the conversation towards customer feedback and impact on the customer rather than anecdotal evidence.

Additional Resources:

- Sorting of Service Recovery Comments in Mural (Demo)
- DOTS Mural Video
- Mural
- Introduction to Mural: Part 1 - Tools & Foundation
- Introduction to Mural: Part 2 – Features & Productivity
- Learning Mural for Collaboration (NEFED 7019529) in TMS