

ALIGNMENT

Confirm executive commitment, funding, and accountability. Ensure project understanding by executive team, and communicate project intent and needs to leadership team to facilitate further activity. Set baseline scope, expectations, resources, and constraints.

PROJECT PREPARATION & LOGISTICS

- What makes a good service design project?
 - Readiness for change
 - Capability
 - Commitment and capacity
 - Creating shared value
- What to expect during and after the project.
 - Examples of deliverables

FUNDING AND APPROVALS

- Create project governance, escalation, and approvals
- Budget allocated and approved
- Business area has direct involvement in project decision making.

SETTING UP THE TEAM

- Executive sponsor & internal team selection. DSS advisors selected. Partner vendor selected if needed.
- Working Group selected.
- Roles, responsibilities, communications & expectations
 - Business area representation
 - Committed, Capable, Adaptable
 - Connected with Org, Stakeholders
 - Available to Travel

The Business Foundations Workshop

- Service Selection (Business Goals & Objectives, Current Known Pain Points, Transformation Plan, Business Case)
- Stakeholder Mapping
- Business Model Canvas

MANAGING CHANGE

- Relationship with other programs
- Managing Risk in a service design project
- Service Design as Change
 - Using this approach may generate findings that are broader than your initial

expectation. May impact across entire service architecture (e.g. client interface, policy, technology, legislation, HR, facilities).

- Setting expectations for change management

PROJECT FUNDAMENTALS

- Initial Project Workplan
- Privacy Impact Assessment
 - (Need to go broad about what information may be collected for a prototype based on information collected today. Optional, but available.)
- The Opportunity Log
- Communications & Change Management Plan
- Project Charter/Partnership Agreement
- Recruiting Logistics
- Recruiting Logistics

DELIVERABLES

- Partnership Agreement
- Business Model Canvas

OUTCOMES & RESULTS

- Clear understanding and expectations by project sponsors, other leadership, and program area and partner teams.
- Commitment to the change management investment required to successfully create the most value from a service design initiative.

PRINCIPLES

- Service Design is Change Management
- Clear Expectations Are Key
- Show and Tell Ways of Working
- Recruiting, Recruiting, Recruiting.
- Prime the Organization

DISCOVERY

Understand the current state of service delivery based on real world research. Generate insights, understand needs, & establish initial baseline service measures.

Internal Desk Research

- Environmental Scan
- Channel/Volume Check
- Service Interaction Types
- Research Review

Research Plan

- Approach for internal discovery and field research
- Research logistics
- Research guides

BUSINESS DISCOVERY

Internal Understanding Workshop

- Preliminary Personas & Scenarios
- Preliminary Journey mapping.
- Preliminary Empathy mapping.

Internal Interviews

- Internal staff interviews
- NOTE: Frontline interviews may be combined with field research and observation.

FIELD RESEARCH

Research Preparation

- Logistics (travel & recruiting)
- Daily debriefing

Research

- Site Visit(s)
 - Onsite observation and interviews with clients and frontline staff.
- Interviews
 - Scheduled interviews with clients
- Co-Design Workshop(s)
 - Workshop with clients or staff to understand current service experience (and explore possible opportunities).
- Diary Study (R2)
 - Clients who use a service over time keep a diary of service interactions and other relevant experiences. Team collects diary recording and conducts a final interview to explore significance of diary events and observations.

METRICS RESEARCH

- Behavioural Analytics & KPIs
 - Current Analytics & metrics
 - Design Principles
 - Service Interaction Types
 - Research Review
- Surveys
 - CMT/ServQual/RATER (preferred)
 - NET Promoter (avoid unless in competitive service domain)
 - Gallup CE 11

ANALYSIS

- Preparation
 - Research notes and data review
 - Computerized Theme Analysis
 - Statistical Analysis (quantitative data)
- Research Analysis Workshop
 - Affinity Analysis
 - Task Analysis (optional)
 - Personas & Scenarios

Journey Mapping Workshop

- Journey Mapping based on research findings
- (May combine with future map opportunities based on time)

Metrics Design Workshop

- Generating relevant metrics that reflect the client journey
- Establish initial Service Evaluation Model

Reporting

- Research Findings Report
- Journey Mapping
- Service Evaluation Model
- Initial Service Baseline

DELIVERABLES

- Personas and Scenarios
- Feature Value Matrix
- Business Model Canvas – Future
- Journey Map(s) – Future
- Service Evaluation Model
- Opportunity Log

OUTCOMES & RESULTS

- Understanding of current services from both inside-out and outside-in perspective.
- Outside-in perspective is a critical success factor for service transformation.
- Model meaningful metrics: Understanding client and stakeholder needs helps understand which measures matter. How will we know we're successful?

PRINCIPLES

- Recruiting, Recruiting, Recruiting.
- Explore the Whole Experience
- Get Out in The Field
- Design With vs. Design For
- Map Defining Moments
- Measure What Matters

OPPORTUNITY

Explore opportunities for future services and improvements. Establish strategic direction for service futures and opportunities for immediate improvement. Identify new capability.

INDIVIDUAL, TEAM, AND LARGER GROUP WORKSHOPS

- Preparation
 - Workshop logistics & scheduling
 - Workshop supplies
 - Workshop participants (selection, invitation)

The Opportunity Workshop

- Research Briefing
- Presentation of Current Service Model or Map (Journey Map, Storyboard, or Business Origami)
- Individual Opportunity Brainstorming
- Future Service Model or Map (Journey Map, Storyboard, or Business Origami)
- other Prototypes may be necessary depending on how novel new opportunities are to the organization.

Opportunity Selection & Priority

- Service feature inventory
- Weighted Feature-Value Matrix or other prioritization tool
- Some Opportunities may need Prototypes to validate.

Initial Blueprint Workshop

- Extend journey map with organizational layers including
 - Channels
 - Org Capabilities
 - Business Process
 - Physical Environment
 - Staffing & Org Structure
 - Policy & Strategy
 - Technical Systems

Blueprint Design and Development

- Add blueprint details
- Create Alpha Blueprint
- Review Alpha Blueprint for Prototyping touch points

Future Business Model Workshop

- What does the business model canvas look like for new service offering?

DELIVERABLES

- Expanded Opportunity Log
- Feature Value Matrix
- Business Model Canvas – Future
- Journey Map(s) – Future
- Initial Service Blueprint

OUTCOMES & RESULTS

- Generative divergent approach breaks status quo thinking.
- Set of options and opportunities to consider.
- Outside-in model for future services through desktop walkthrough and future journey map.
- Execution model for future services via blueprint

PRINCIPLES

- Lead with Need: Connect Needs to Capabilities
- Go Wide, Then Narrow
- Start Solo, Then Merge
- Volume Drives Vision
- Effectiveness Before Efficiency
- Create Shared Value
- Address Entire Service Architecture
- Technology is not an answer by itself

PROTOTYPE & TEST

Make ideas tangible so they can be understood, tested, refined, and improved. Manage risk by creating and testing multiple solutions with real clients to increase value from opportunities. Prototype across touchpoints, time, and levels of realism. Test concepts.

Prototyping Preparation

- Select Touchpoints and Interactions
- Comparative Evaluation
- Policy Check-in
- Choose Prototyping Methods/Media
 - Paper (Sketch, Storyboard, Comic)
 - Screen (PowerPoint, Comic Life, Axure, Excel, HTML, Floorplan software)
 - Desktop Walkthrough
- Business Origami
- Lego/ Playmobil
- Physical Mockup
- Role play, bodystorming
- Cardboard/ Foamcore
- Poster/brochure/ form/Telephony
- IVR, Call Centre – Wizard of Oz
- IVR, Call Centre – VoIP Prototype
 - Concept Video/ Storyboard Animation
 - Infographic

Prototyping Workshop(s)

- Create prototype of service touchpoints based on identified opportunities
- 10/3/1 (Generating many solutions, refining to one to test)

Prototype Design and Development

- Refine, design, and produce prototypes based on workshop if workshop output requires additional design and production.

Recruiting & Logistics

- Intercepts, etc.

Prototype Testing

- Design Review/ Critique
- Concept Testing
- Usability Testing
- A/B Testing
- Diary Study in Pilot Group

DELIVERABLES

- Prototypes
- Evaluation Reporting

OUTCOMES & RESULTS

- Proof of concept
- Mitigate risk by exploring multiple solutions
- Mitigate risk by evaluating solutions
- Build confidence through demonstrating how a service will work in the real world
- Concrete prototypes help confirm commitment

PRINCIPLES

- Make It Real
- People + Prototypes = Confidence
- Decide Faster With Concrete Models
- Make It, Try It, Test It, Use It, Prove It
- Iterate. Iterate. Iterate.
- Making trumps talking
- Low fidelity now is better than high fidelity someday
- Keep Your Options Open

ROADMAP

Communicate a clear path to realize opportunities and follow vision. Establish shared understanding, priorities, and plans through communication and visualization.

Preparation

- Review Prototypes & Evaluation

Blueprint Finalization

- Update Blueprint based on prototype findings

Roadmap Workshop

- Confirm Priorities
- Update Feature/ Value Matrix
- High Level Estimate resources, time, talent, budget needed
- Connections to other Ministry Government initiatives
- Other Dependencies
- Governance & Staffing
- Ministry capabilities
- May break some high level activities into smaller parts
- Additional activities that are recommended based on findings

Roadmap Recommendations Report

- Roadmap Visualization
- Detailed Swimlanes

Case Study Submission/ Debriefing

ACTIVITIES

- Findings Review
- Blueprint Finalization
- Roadmap Workshop
- Roadmap Recommendations Report
- Roadmap Visualization
- Case Study & Project Sharing

DELIVERABLES

- Final Service Blueprint
- Roadmap Report
- Roadmap Infographic
- Case study of project

OUTCOMES & RESULTS

- Clear set of priorities and timeframes for action to deliver service elements.
- Clear connection between policy and delivery
- Articulate the value and benefits of service investments for government, citizens, and other stakeholders.
- Accelerate production activities by reducing uncertainty during implementation.

PRINCIPLES

- Buildings Need Blueprints, So Do Services
- Roadmaps Make Priorities Clear
- One Big Map is Better Than a Dozen Binders
- Connect Policy & Delivery
- Show Shared Value
- Share Project Wisdom

IMPLEMENT

Set client up for success through a continuous improvement framework that creates an improved experience for citizens and stakeholders. Prototypes and iterations come to life and become useful services for people.

Activities

- Determine best approach to use for implementation
- Involve development teams early in iterative prototyping and testing
- Create a shared understanding of results from research findings and prototype testing insights
- Development of the product or service

DELIVERABLES

- Standards and guidelines
- Identification of ongoing resourcing requirements
- Product or service governance plan
- Product or service maintenance plan

OUTCOMES & RESULTS

- Clear path for teams to realize future opportunities and follow vision beyond the launch of a product or service
- Create a shared understanding, set priorities, and support the development of future products or services
- Track service improvements over time through measurement to support performance baselines for improved service delivery, future strategic direction for policy changes, financial management, and change management

PRINCIPLES

- Don't Leave it till the End
- Have a Decision Point
- One Size Doesn't Fit All