



THE **SERVICE DESIGN** PLAYBOOK

beta version one



Government Communications
and Public Engagement

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INTRODUCTION

This first edition of *The Service Design Playbook* describes a comprehensive method for the BC Public Service (BCPS) to design great services for British Columbians.

Governments everywhere are faced with fewer resources to meet growing expectations from citizens. Customer-centred design has made everyday activities like shopping and banking responsive to people both online and in person. Applying thoughtful, consistent design approaches to service can help the BCPS realize the improvements seen outside government. BC public servants bring compassion and program expertise to the job. The Playbook is intended to help ensure they have the necessary tools and corporate support to make change.

The shift envisioned in [Citizens at the Centre](#) focuses on self-service. It is about expanding opportunities for citizen self-service by improving and modernizing the government's online services so they are shaped less by the structure of government and more by citizen needs. The digital service vision in the BCPS, which is based on the self-service shift of Citizens at the Centre, is about more than moving services online. The vision is based on the social value that citizens should be able to serve themselves to the extent that they are able or motivated to do so and that further assistance, or full service alternatives, will be available as needed.

The Playbook's approach is based on direct research with citizens and service providers, as well as prototyping and testing in the real world. Service delivery includes many kinds of exchanges between people, places and technologies, and it has been learned that the frustrations with service often happen between these touchpoints. It is about building services with the people who will be using them, as opposed to building services behind closed doors and hoping that they work. The service design approach brings together citizens and BC public servants to understand where the challenges are now and make sure we are solving real problems. These are practical tools to help us imagine, make and measure improved services.

The Playbook is intended to help build a structure around the things that public servants inherently know when serving people. Public servants connect with people's needs, answer those needs, and do it in a way that is efficient for the organization and outstanding for the citizen.

Most of the time citizens prefer to go about their lives and not have to deal with government. But when they do need something from government—a permit, a tax break or care for an ageing parent—they want both the service itself, and the information available about the service, to be simple and supportive. Public servants strive to make that simplicity possible on the frontlines and in the overall design of services. Of course it does not work perfectly every time; however, everyone has had that feeling of providing exemplary service. That positive service experience builds trust and confidence in government and motivates employees in the work they do.

There is value in the service experience in the BCPS. As service quality goes up, costs come down because issues are addressed in less time. Service design is a tool for doing good work in improving the public service and can save time and money while improving the service experience.

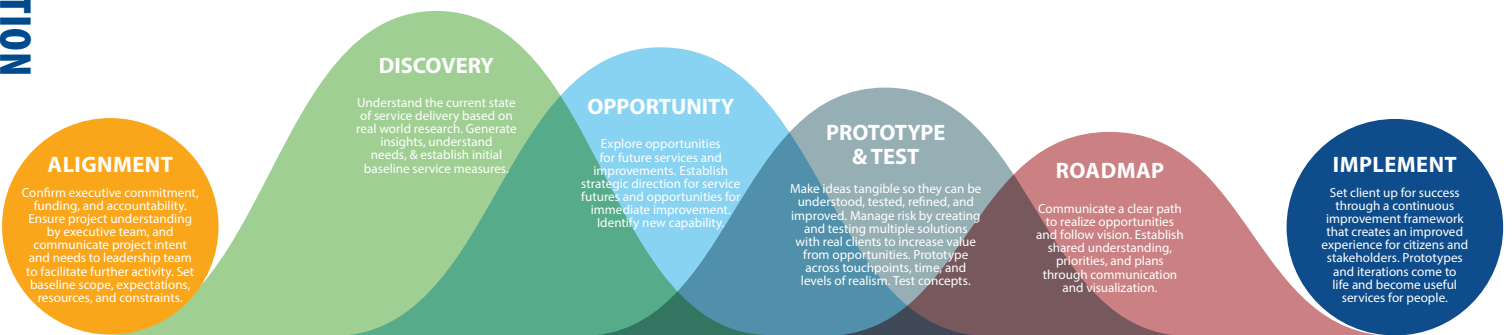
Compared to budgets for significant capital and ongoing transformation projects, service design is a relatively small investment to ensure that outcomes and needs have a foundation of evidence and insight to guide project decisions and strategy.

The introduction to the Playbook goes into more detail around:

- **What:** what is service design?
- **Why:** why we do service design in the BCPS
- **When:** when you should consider service design
- **How and Who:** how service design is done in the BCPS, and who the Playbook is for

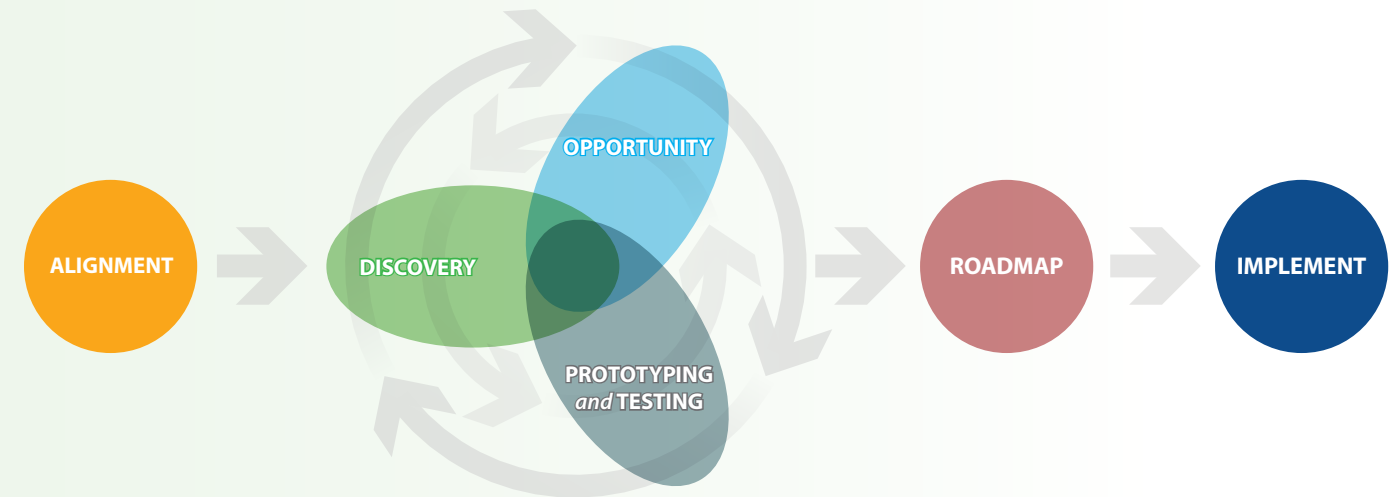
The sections that follow describes the five phases of service design utilized in the BCPS:

- **“Alignment Phase”** on page 19
- **“Discovery Phase”** on page 26
- **“Opportunity Phase”** on page 54
- **“Prototype Phase”** on page 64
- **“Roadmap Phase”** on page 76
- **“Implement Phase”** on page 82



Service Design is Iterative

While the five service design phases have been laid out in sequence, in practice teams may go back and forth between phases as they iterate through this work



What is Service Design?

The *Service Design Network* defines service design as:

“... the activity of planning and organizing people, infrastructure, communication and material components of a service in order to improve its quality and the interaction between service provider and customers. The purpose of service design methodologies is to design according to the needs of customers or participants, so that the service is user-friendly, competitive and relevant to the customers.”

Service design is an established discipline with a deep history. It follows a tradition of human-centred design, with roots in early manufacturing, architecture and industrial design. See “Appendix A: The History of Service Design” on page 82 to learn about how the history of service design has set the stage for best practices adopted in the Playbook and other jurisdictions throughout the world.

Service design is also a dynamic discipline that continues to evolve and improve. It offers a clear set of solid principles and methods that will support service effectiveness and efficiency in creating holistic services that improve the citizen experience. **Great services don’t happen by accident; great services are designed.** If you are a service owner in the BCPS you are likely already using some of these principles and tools.

For the BCPS, this is a new approach to service innovation that extends government’s traditional practices. It relies on direct, behavioural, systemic research with citizens and other stakeholders to understand context and opportunities. These insights lead to rapid prototyping and iteration to try out new ideas and manage risk. To be successful in government’s service transformation work, public servants need evidence in order to recognize the real challenges and confidently propose opportunities to enhance how government delivers services to citizens. Government needs to try out opportunities quickly and inexpensively before committing to full implementation. A service design project allows staff to do that, and the Playbook gives guidance and support for these activities.

Service design is all about making the service you deliver useful, usable, efficient, effective and desirable.¹ – *The UK Design Council*

“As we reform the delivery of public services they are designed around the needs of the user, rather than has been far too often the case in the past, being designed to suit the convenience of the government.” – *The Right Honourable Francis Maude, Minister for the UK Cabinet Office, in the UK House of Commons*

Related Thinking

Digital Services Strategy

Provides the corporate direction for service transformation and outlines the motivation and context for the new service design approach.

Digital Services Consultation, Minister’s Response

The Government’s commitment to ensuring that new digital service investments work for citizens and other stakeholders in British Columbia to create value for individuals, communities and the province.

Citizens @ The Centre

The BCPS’s foundational commitment to citizen-centred service, open government and workforce transformation.

Service Design Methods & Tools

The gov.bc.ca methods and standards for better web, based on user research.

OCIO Outcomes Management Guide

The Office of the Chief Information Officer (OCIO) has developed this guide. Its purpose is to provide Business Leads, Project Directors and ministry Chief Information Officers with guidance in conducting outcome management, and articulating and managing near-term results.

What Makes a Service Great?

So what is it that makes a government service great? The answer depends on who you are:

- ▶ For citizens, a great service is reliable, timely, easy-to-use, and meets their needs. The service fits into the way they already see the world, and in the best cases, exceeds their expectations. It offers the convenience of self-service, backed by the confidence of assistance and expertise from trained, professional public servants at the counter or on the phone, when needed.
- ▶ For frontline staff, it means having the processes, autonomy and support to do their work both efficiently and (even more importantly) effectively, to make a real difference in people's lives and to see how their own contribution makes British Columbia a better place.
- ▶ For management and executives, a great service achieves policy outcomes while being sustainable and using budgets and other resources responsibly, where their teams have the tools and training needed to confidently deliver that service and where the mandate and success measures are clear and matched to the resources available.

How Service Design Shifts Our Work in the Public Service

The goal to provide great service experiences for citizens is, of course, nothing new. Service owners already spend much of their effort working to improve service and are likely already following many of the principles and using some of the methods found in the Playbook.

What establishing a service design methodology does is fundamentally shift how we understand, plan, deliver and measure services.

For example, service design involves:

- ▶ Conducting deep qualitative research into the service experience
- ▶ Modeling service journeys that describe a service over time and across touchpoints
- ▶ Prototyping new service interactions
- ▶ Evaluating and measuring the service experience
- ▶ Planning the needed capabilities to deliver a new or improved service experience

This shift in perspective and practice can be expressed with the following principles:

1. Start with the experience and needs of citizens.

Service design hinges on an outside-in understanding of the needs and experiences of the people who use the service. Behavioural field studies and experience mapping contribute to a rich understanding which often significantly change pre-conceived ideas for solutions.

Gaining an understanding of the entire service experience requires crossing organizational boundaries to examine interactions across touchpoints and time and how they integrate. This examination sparks insights that drive innovation and lead to better decisions for implementation.

2. Design *with* people, not just *for* them.

Beyond ensuring a solid understanding of their needs and experiences, service design goes further and involves citizens, frontline staff and other stakeholders as co-creators in the design process. Co-design increases the diversity of insights that are generated leading and possibility for more innovative solutions. It engenders buy-in from citizens and a sense of ownership from staff who will be responsible for the service transformation.

3. Develop visual and tangible artifacts for shared understanding.

To achieve a shared understanding and enable service providers to make decisions and plans, service design projects produce visual and tangible artifacts.

Journey maps represent the entire service experience as it is lived in daily life.

Prototypes are representations of future services that can be touched and that enable people to act out how the service will work.

Blueprints represent the front- and back-end pieces that need to come together in order to make the service a reality.

Roadmaps represent the activities that will have to be taken over time to implement the service and how they depend on one another.

4. Move between big picture and detail, and back again.

Service design creates the space to understand the big picture along with program details. Too often the pace of projects means that teams cannot see the forest for the trees. The pressure of immediate, concrete delivery means that teams often do not have time for a full systemic viewpoint. Without that big-picture context they run the risk of limiting focus to detailed implementation that does not contribute as much to the overall value for citizens.

Understanding the entire service experience helps you to see the outcomes you are trying to achieve and better plan policy and implementation, strategy and delivery.

5. Address the entire service architecture.

Service design looks at the entire service architecture—all of the systems that support the service, including the interface, operations, policy, organization and legislation. For true service innovation and transformation to happen, we must consider how all of these systems interact and support one another. This integrated system of service elements is a service architecture, and creating the entire service architecture is key for service transformation and innovation. Instead of operating at just one layer, service design provides the invitation to consider how these different layers interact and support one another.

Service architecture is a systemic consideration of the interrelated impacts on the service experience from frontline service delivery, technology, process, policy and legislation. It provides an end-to-end alignment between all the elements needed to deliver a service. – Touchpoint 5.2
Designing Citizen-Centric Public Services

Service design and the Digital Service Strategy will have their **greatest impact** within the BCPS as it addresses the full range of ministry service architecture elements, from client interaction and interface, through to legislation, regulation, policy and strategy. Interface changes alone are insufficient to achieve meaningful service transformation without also addressing the underlying strategic structural, legislative and policy elements that contribute to a service.



Why do Service Design?

Service design is a way to improve service holistically so that it is better for citizens and for staff. It builds on the BCPS' success with User Experience Design, Citizen Engagement, Transformation Planning and Lean.

The methodology described in the Playbook, and the digital service vision that guides it, are based on proven practices in the field of service design adapted for applicability in the BCPS.

Why do service design in the BCPS? Here are a few principles that will help answer this question. These are the guiding concepts for the approach.

Principles

Service is our business.

With a few exceptions, government does not provide products or things to citizens. People interact with government over time and touchpoints like web, phone and face-to-face. In the public service, we are responsible for these interactions and transactions, and for designing them so they make sense from the citizens' perspective. We need to address the whole service experience over time and across channels. This means designing beyond specific services, and thinking about the entire experience from the citizen's perspective.

Design with people, not just for them.

As a public service, we have committed to, and made progress on, opening government to citizens through engagement and consultation and citizen-centred user experience design. The Playbook applies these values to the disciplined design of services. It is grounded in real world research and testing with service providers and users. Its methods of co-design produce services that are better for citizens and public servants alike.

Try before you buy.

Service design is insurance. When used upstream of major projects, it ensures that real, pressing problems are being solved. It allows programs to experiment with solutions quickly, fail and improve ideas at a low cost, and move into the design and implementation phases with greater confidence.

Start with simple.

Big improvements can stem from small changes. Even small fixes--changing office hours, keeping people updated on the status of their application, or improving a form with plainer language, for example--can markedly improve quality and efficiency.

When to do Service Design

The best time to take on the service project is early, before drafting a formal business case and requirements or undertaking a needs assessment. Symptoms and signals will show the needs and opportunities for service innovation (e.g. long phone wait times, high levels of staff or client frustration, or a general consensus about the need to change).

The project team will likely have initial ideas on how the problem could be addressed. These ideas will be developed through staff insights, by testing existing services with users (surveys, usability studies) and guided by the strategic directions of the program area. Early research may have already been undertaken to see how other jurisdictions have handled similar challenges. This is a great starting point for a service design project.

Service design can work for all aspects of government service—a contact centre, front counter, website or when developing a new program or policy. It is not tied to a particular channel of service or to technology. It applies to both new services as well as to a refresh of existing services.

This service design approach will help to ensure that the investment and effort is justified by a real citizen need and it will create capabilities in the BCPS that produce desired program outcomes. Service design ensures that the resulting service is delivered using the channels and technologies that make the most sense for the users of the service, and the staff delivering the service. For example: design research may reveal that a sophisticated technology will not actually improve service, and that instead, thoughtful connections between existing channels would help more.

Service design brings the most value when it happens early in a project, before committing to a specific direction, technology or detailed project scope. But even if the project team has already started a project, service design can still bring innovative insights, help mitigate project risks and connect needs to program capabilities.

Any project that involves redesigning a product or program can benefit from adopting this process. Including a service design cycle should be part of upstream planning, whether improving a current service or offering a new one, be it online, over the phone or at a counter. When planning to revise a transactional service, change a policy, conduct a consultation or deliver information about a program, service design can help.

The project will benefit from this approach if it meets most of these criteria:

- ▶ The service is, or should be, delivered across touchpoints:
 - ▶ *If people need to interact with the service in a few ways (on the web, in person, on paper, over the phone), a service design approach will help to see which touchpoints are most important and how to design them. For example, getting a passport is a multi-touchpoint service; a person needs to prepare the documentation online, present and validate it in person and receive the passport in the mail. They can also get help over the phone.*
- ▶ The service stretches over time:
 - ▶ *A concern may be identified as solving a problem at a particular transaction point, such as an online application for a fishing licence. But it is likely that the application is part of a process for the citizen including finding background information, having the licence available when fishing and renewing the licence.*
- ▶ Ageing technology needs to be replaced:
 - ▶ *This is an ideal point to review the challenge that the technology was originally designed to meet. Research findings may show needs have shifted for citizens and staff, and that different or less technology can meet those needs. For example, many government services assume that citizens have easy access to fax machines, while most citizens have moved on to email or other online communication tools.*
- ▶ Program reviews and new initiatives:
 - ▶ *Whether through a regular review process or in response to new legislation, needs for new or reformed programs arise.*
- ▶ Large-scale:
 - ▶ *This is relative to the size of the program, but a good indicator is any work that is projected to take longer than six months to complete. If the project requires more than four full time equivalent (FTE) staff effort or \$150,000 in contract services, the ministry will be well served to start the project with service design.*

Not everything can be fixed with these tools. See “Appendix B:

Service Design and other BC Public Service Approaches” on page 84 for information about service design work in the context of other methods so that the right tools can be chosen for the job.

“An architect’s most useful tools are an eraser at the drafting board and a wrecking ball at the site.” – Frank Lloyd Wright

Must or Should?

The digital service vision, and the tools in this Playbook, is applicable first and foremost to Information Management/Information Technology (IMIT) capital projects, digital service initiatives, service transformation initiatives and strategic priorities. However, any project that is about technology development, policy change, or service enhancement will benefit from a service design approach.

The Deputy Ministers’ Committee on Technology and Transformation (DMCTT) or the Office of the Chief Information Officer (OCIO) may require a service design project as a condition for funding an IMIT capital investment. The project may be required prior to capital funds being released, or it may be integrated within the capital project itself.

As part of the responsibilities to ensure value for citizens and service delivery under [Chapter 22 of the Core Policies and Procedures manual](#), Government Communications and Public Engagement (GCPE) may also require service design for other service transformation projects.

Part of GCPE’s mandate is to “Ensure that citizens can access the information and services they need from government in a way that is efficient and effective.” In order to achieve this objective, GCPE “may set standards to mandate the use of specific communications and public engagement services or practices.”

IMIT Capital Projects

The service design approach may be a required step in the transformation process as determined by DMCTT or the OCIO. If ministries have an approved capital project in the planning or requirements stage that requires service design, they can contact the Strategic Design and Transformation Branch (SDTB) to plan for this part of the project. If ministries are putting together a concept or business case for a capital project, they are ideally situated to derive the most value from a service design project as it will ensure that the investment and effort is justified by a real citizen need. The SDTB can help integrate service design as part of the business case or preparation for a capital funding request.

The principle is the same across capital projects big and small: understanding and measuring the current service environment, and testing proposed improvements before building, is good insurance. An investment in service design upfront will help you define clearer business requirements and be more confident that you are fixing the right problems in the right way.

How to do Service Design

It is essential for ministries to understand what service design is and know under what circumstances they should do service design in the BCPS. But how does a service design project actually get initiated and what are the steps involved?

The sections that follow will:

- ▶ Assist in understanding who the Playbook is for
- ▶ Explain how to use the Playbook
- ▶ Describe the BCPS methodology for service design

Using the Playbook: The BC Public Service Context

Who is the Playbook for?

The Playbook is intended to be used as a guide while the project team progresses through a typical service design project. The Playbook is written from the perspective of teams doing service design projects in partnership with the Strategic Design and Transformation Branch (SDTB) at GCPE, but this may not always be the approach that is taken. Some programs in government may have strong capacity in service design available to them already, and others may build that capacity through experience working with SDTB.

Once staff have participated in a couple of service design projects with the SDTB, they may feel comfortable conducting a service design project on their own. The Playbook can then be used as a guide for service design projects.

Core team members will work on service design projects to help change the way that the ministry, division or program area delivers services. The team may find that they are using many of these kinds of tools in their own work already and that this is a natural extension of current skills. They may also find new areas of personal growth—new skills and the excitement of being involved in service innovation. The SDTB will collaborate with team members and support them throughout the project.

Business leaders will sponsor service design initiatives as part of projects that lead to service delivery change. The SDTB will work with business leaders and their teams to plan the service design project and review progress at milestones throughout the project. The Playbook introductory content, and the Alignment Phase content, will likely be most useful to help integrate service design into the team's work.

For those in leadership roles responsible for leading and implementing business transformation, the Playbook offers a service design overview and a foundation for those who direct transformation projects. It also offers more detailed direction for the project teams, staff, and consultants, who will implement service design in support of those projects.

Design vs. Service Design

Just about every project undertaken in the BCPS is in some way a technology project, and just about all of these projects involve some aspect of design – systems design, graphic design, process design. These design phases follow business requirements and precede development. Service design is different; it is applied to the whole service rather than to one aspect of the service. Service design happens upstream, ideally just before or alongside formal business case development. It helps with the later design processes by clarifying the scope and scale for the detailed design work. These design phases (and their practitioners) are complementary.

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.

ROADMAP

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

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.

OPPORTUNITY

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

DISCOVERY

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

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.

The BC Methodology and Project Approach

The BC Service Design methodology uses six phases: Alignment, Discovery, Opportunity, Prototyping, Roadmap and Implementation.

Each phase answers a key question:

- ▶ Are we ready? (Alignment)
- ▶ Where are we at today? (Discovery)
- ▶ What are the right opportunities for tomorrow? (Opportunity)
- ▶ How could it work? (Prototyping)
- ▶ How do we get there? (Roadmap)
- ▶ How do we make it real? (Implement)

This process reflects established methods and leading thinking in the discipline of service design. The BCPS has adapted these to best fit with existing practices in government. The SDTB first undertook proof-of-concept projects to test the methodology and have since completed a number of service design projects. Some of the results and artifacts from these projects can be found in the Playbook. The SDTB continues to learn as ministries complete service design projects.

The methodology is grounded in direct research with citizens and staff and uses specific activities to gain insight. It starts with gaining a full understanding of the service context, primarily from the view of the citizen. When the experience has been described and mapped, the pain points that indicate opportunities for improvement are shown. From here, prototypes are developed to test the service.

The Alignment Phase is about ensuring that the proper approvals, budget, expectations and teams are established.

The Discovery and Prototyping phases are about hitting the road to observe and co-design in the field with the people who use and deliver the service.

The Opportunity and Roadmap phases allows teams to process what they have learned, extract the key insights and produce compelling artifacts.

Whether the team is internal, contracted or a combination, it is of value for all members of the team to participate in all phases of the project. The recommendations in the Opportunity and Roadmap phases will be more compelling if staff have been directly involved with research, and creating and testing the prototype.

Project Timeframe

The methodology is purposefully compact. It compresses a full service design cycle into the tightest timeframe so that program areas can accommodate this new approach without disrupting current commitments. The SDTB has learned that service design work up front will save time later in development, resulting in overall successful projects. Still, the intention of this approach is to provide the greatest insight with the smallest footprint.

Keeping the timeframe compact also means that insights can be translated into services sooner. The outputs from the service design project will include near-term opportunities that can be seized right away, as well as results that will feed into larger work.

After working out the approach and understanding internal needs in the Alignment Phase, the target timeframe for the remaining cycles is usually around four months. Understandably, competing priorities in program areas may demand some flexibility in this timeframe. However, it is key to conduct the work continuously and with focus; this keeps research findings and insights fresh when designing prototypes and keeps prototype testing experience front of mind for the subsequent steps and work of the project.

Team Composition

A full service design project represents about 1,200 hours of professional service design effort, though some projects may apply these methods but with a smaller scope. The most common model for service design teams in government to date is a core team of three to five people, which is made up of a mix of ministry staff, SDTB service designers and specialized vendor support as needed.

Roles on the core team include a project lead from the SDTB and a project lead from the ministry or program area. Additional staff are also required to help with the many involved phases along the way. A specialized vendor is often engaged for the service design expertise that they bring to the team.

Typically, the project lead from the ministry is required to have a broad understanding of the program area at both the strategic and operational levels (one Spell out Full Time Employee [FTE] at 50%). The other team members (could be frontline and behind-the-scenes staff) are needed to provide a deeper understanding of the business context and challenges, and to actively share in prototype design and testing (two to three FTE's at 25% each).

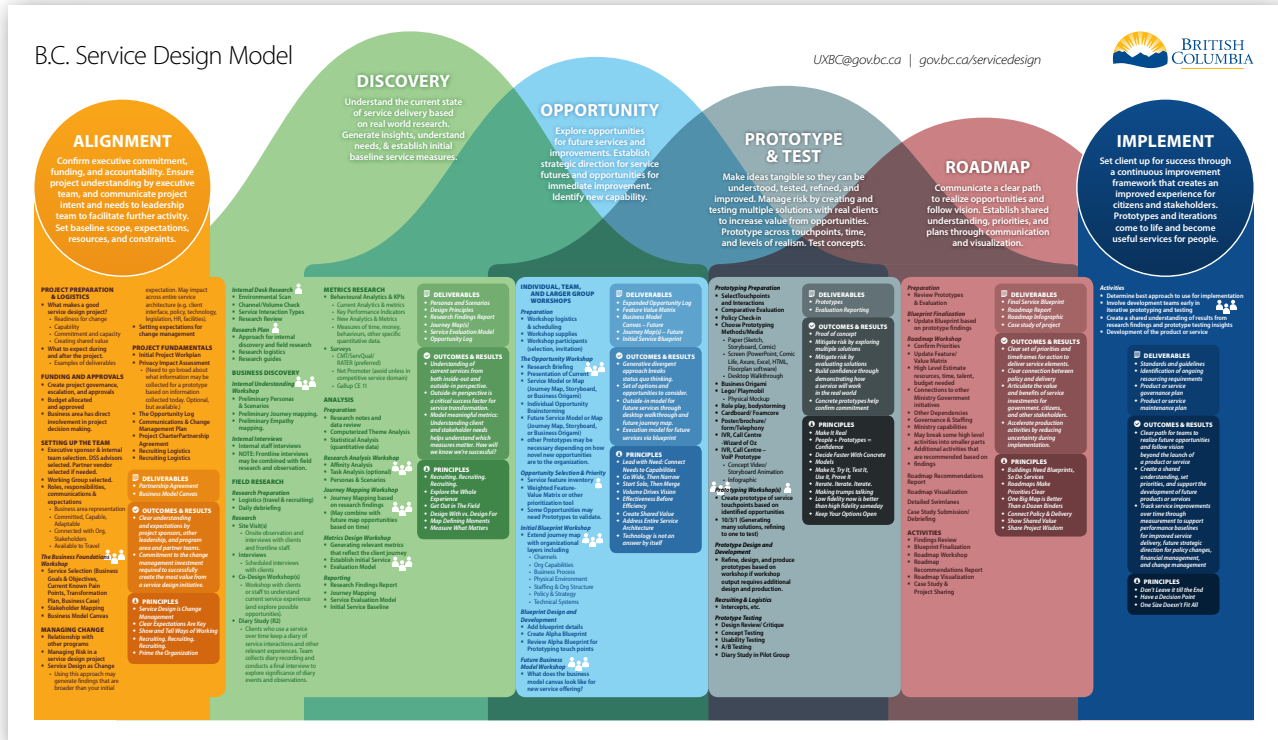
Members of the core team can expect to spend a fair amount of time on the project—whether participating fully in field research and analysis, to assisting with facilitating prototyping sessions—so it is important for everyone involved to understand the time commitment and to allow for the commitment to be possible in order to see the project succeed.

The section on “Setting up the Teams” on page 20 in the Alignment Phase goes into more detail about the different kinds of teams required for the success of a service design project in the BCPS.

Service design work requires a skillset that may not be available in your ministry or current vendor community. The SDTB can assist ministries in planning the project and help find the right resources within the ministry and the vendor community.

The BC Service Design Playbook Visual Index

The following diagram summarizes the Playbook approach. The Playbook offers background, details, how-to instructions and related resources for doing service design. This diagram gives a high-level snapshot of the approach and can help to focus on the areas of the Playbook that need to be explored in more detail.



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i <http://www.designcouncil.org.uk/news-opinion/why-public-sector-needs-service-design>
 ii McMullin, J., MacLennan, A., Bohn, D. & Neufeld, B. (2013) "Connecting Practice and Policymaking" in *Touchpoint: Designing Citizen-Centric Public Services* vol. 5 issue 2. The Service Design Network. Berlin.

THE SERVICE DESIGN PLAYBOOK

ALIGNMENT PHASE

Getting ready for a service design project is what the Alignment Phase is all about, and like any project it is important to begin with a strong foundation.

The Strategic Design and Transformation Branch (SDTB) can work with ministries to assist in ensuring service design starts with a strong foundation. Service design can be considered an exercise in coordinating all the elements of a program area to deliver better services, and as a result service design projects often have many stakeholders and organizational complexity to respond to.

Some of the greatest risks to any project include:

- ▶ Having a misunderstood approach
- ▶ Mismatched expectations
- ▶ Poor communications
- ▶ Lack of commitment, funds or approvals
- ▶ No plan for managing change
- ▶ Having the wrong people on the team or at the table

It is important to the success of the project to line up these elements before starting a service design project.

During this phase, the SDTB, together with the ministry or program area participating in the project, will want to establish early project expectations, executive briefing expectations, confirm executive commitment, funding, accountability, communications, and come up with a plan for managing change.

Project Basics, Preparation and Logistics

Understanding the Work and Setting Expectations

Ensuring that everyone involved in the project has a clear understanding and expectation of the basics of the project is crucial. It is important to spend time explaining things like: what is planned, who else is involved, when activities will take place, what kinds of outcomes and deliverables can be expected, how the team will work, why the project is important and how the work will impact the organization.

The best way to work through these important pieces is to have discussions with the SDTB. The branch will be able to share examples of past projects, which can help answer project-related questions at this early stage in the process.

The project sponsor will also be working with the SDTB to create an initial project workplan as well as a Partnership Agreement to outline the approach of the project.

Partnership Agreement

The Partnership Agreement describes the joint commitment of the Government Communications and Public Engagement (GCPE) and the partnering ministry or service delivery area in delivering a service design project. The agreement indicates initiation of the project and that both parties agree to fulfill the responsibilities outlined in the agreement.

A typical Partnership Agreement includes the following information:

- Business objectives
- Project background
- Work breakdown
- Ministry responsibilities
- Assumptions and dependencies
- Schedule and budget

Privacy

Direct research with stakeholders sometimes requires the completion of a *Privacy Impact Assessment (PIA)*. The PIA can be developed when the team has a clear sense of the project approach and the stakeholders who will be involved in the project.

The Strategic Design and Transformation Branch (SDTB) can provide sample PIAs from past projects to guide development.

Funding, Procurement and Approvals

Clarify budgets, in-kind contributions, sources of funding and approvals. Ensure procurement staff have enough lead time to create a responsive procurement process without undue pressure.

Funding considerations for user research may include recruiting costs and incentives (such as gift cards), transcription, travel and facility rental for workshops.

Whenever possible, use government buildings to host meetings and workshops to minimize research overhead. If given enough advance notice, other jurisdictions and organizations, including federal and municipal government or industry-related associations, may also be willing to host teams depending on the research focus.

Part of this budgetary work will help form the information in the Partnership Agreement.

Setting up the Teams

Once ministry readiness, project expectations, and communications have been established, resources will need to be assigned. Service design projects are usually made up of three teams: a core team, a working group and a steering committee.

Core Team:

- Is typically made up of three to five individuals from the SDTB at GCPE and the partnering ministry.
- Typically includes one member from the SDTB, one project co-lead at the client ministry or program area (one Full Time Employee [FTE] at 50%), and additional ministry staff to help with the many involved stages along the way (two to three FTE's at 25% each).
- It is recommended that the ministry co-lead have a broad understanding of the program area at both the strategic and operational levels.
- Frontline and behind-the-scenes staff are needed to provide a deeper understanding of the business context and challenges, and to actively share in most, if not all, project phases.
- Core team members participate in as many of the project meetings, workshops, field research and debriefs as possible. They also assist the SDTB service design lead to make decisions and connections for recruitment and research locations as well as provide ministry context on all aspects of the project.

- ▶ Core team members typically need to be able to work and travel outside regular office hours for field research and workshop facilitation with clients, stakeholders and citizens.
- ▶ Members of the core team can expect to spend a good amount of time on the project. For this reason, it is important for everyone to understand the time commitment for these projects and to allow for this time commitment to be possible in order to see success at the end.

Working Group:

- ▶ Is a select group of individuals found in the ministry or cross-ministry who have a vested interest in the project.
- ▶ Could be made up of directors, managers, program area staff and frontline staff.
- ▶ The purpose of the working group is for the core team to present plans and findings along the way, request feedback as the project unfolds, to introduce the core team to stakeholders and to provide access to service areas.
- ▶ The working group meets regularly with the core team to provide feedback, contribute to group sessions and communicate to other areas of the organization.

Steering Committee:

- ▶ The steering committee is made up of ministry executive and the project or executive sponsor(s).
- ▶ As a reporting out mechanism, meetings with the steering committee are usually held at the end of each phase.

As the teams are assembled, ensure that expectations for roles, responsibilities, approach and communications are clear and understood by all. Regular status or check-in meetings should be scheduled at key points throughout the duration of the project.

Change Management

Service design demands change from the organization. Managing change is an ongoing challenge that begins at the earliest stage of the project.

It is recommended that the core project team embed change practices within the project rather than making change management a separate effort. Everyone on the project needs to be involved in shaping and sharing change. Delivering change is what service design projects are all about, and the core team will need to manage the organization as well as new service innovation.

To manage change, the core project team should regularly brief executives, other teams involved (working group, steering committee) and other internal stakeholders and partners throughout the project and after the project is complete. The ministry co-lead will largely handle communications and change management once the project is complete. They will also be responsible for any ongoing change management while the ministry is seeing the service design project through to implementation and delivery of a new or redesigned service.

A key goal for change management and communication is to ensure that there are no communication surprises. There will be new and surprising ideas and experiences in any service innovation project, but there should not be any surprises about how the project is progressing, what the team expects to accomplish or what needs to happen next.

By keeping project stakeholders informed and involved, the team will be able to overcome unexpected setbacks or other project challenges much more easily.

The Public Service Agency (PSA) offers [comprehensive change management training](#). It is recommended that at least one person on the core team has completed this training or similar training.

Some specific considerations for managing service design change include:

- ▶ Communications and Change Planning
 - ▶ *Identify who needs to be involved in the project and at what level. A decision matrix such as a RACI chart can be useful here. (RACI stands for Responsible, Accountable, Consulted, and Informed). A RACI chart describes the relationship in which different project roles have to various kinds of decisions.*
 - ▶ *Anticipate needs, concerns and motivations.*
 - ▶ *Plan individual and group check-in points to address those needs, keep people informed of progress and manage expectations and commitments.*
- ▶ Visual Thinking and Making
 - ▶ *Making things concrete makes them easier to communicate. That can be through infographics, diagrams and models, or through mock-ups, prototypes or simulations. Making the vision, ideas and desired future tangible will significantly increase understanding and help your change efforts.*
- ▶ Briefings, Working Group, and Other Project Meetings
 - ▶ *Briefings can take place individually and with groups. Early briefings should secure endorsement for the project, and this approach, and smooth the way for project activities.*
 - ▶ *An early 'service design bootcamp' is recommended to introduce this overall approach to executives, service owners and the working group so that everyone has an awareness and understanding of the project goals and methods (and what they will need to do to support those goals).*
 - ▶ *Regular working group meetings are also important avenues for communication and change. These vary from weekly to monthly, depending on the pace of the project. Start with bi-weekly meetings and adjust based on project need.*
 - ▶ *The core team will also have weekly status updates and daily stand-ups. Project management approaches may have other requirements, but ensure that there is ongoing check-ins between the core team, the working group and executive sponsors.*
- ▶ Shifting Culture and Mindset
 - ▶ *Doing a project is an opportunity to create positive cultural shifts. Culture and attitude changes can come directly from participating in a project, seeing success and participating in the larger programs for service improvement (including Service Design, Lean and Enterprise Business Architecture). Conducting activities for training and involving people directly in the project work, such as analysis, generating new opportunities or prototyping to help them experience first-hand the potential of these approaches, is a great way to shift culture and mindset in the right direction.*
- ▶ Additional Change Management
 - ▶ *Change management is an ongoing process of understanding the culture, needs, challenges, capabilities and opportunities of the organization. From initial innovation through to continuous improvement, investing in change throughout the entire service lifecycle is needed. The Public Service Agency has developed [an excellent set of change management resources](#) for reference.*

Alignment Activities

The following are activities that can be done during the Alignment Phase.

The Business Foundations Workshop

The purpose of the Business Foundations Workshop is to ensure a common and shared understanding of desired outcomes as well as developing a current inventory of business and user insights.

Participants: Executive Sponsor, Core Team and Service Area Owners

Time: Half to full day, depending on complexity of services.

Materials: Sticky notes, fine tip Sharpie markers, whiteboard or paper for posting sticky notes, Business Model Canvas templates (tabloid 11x17 up to 3'x2' – larger size for larger groups. Use small size sticky notes for smaller canvas templates).

The Business Foundations Workshop brings the core team and relevant internal stakeholders together to build a shared understanding of the fundamentals of the project.

These fundamentals should build on existing thinking and documentation in the Ministry Transformation Plan and the current business case for the project if one exists.

The team lead should outline relevant business goals and objectives, known pain points and other considerations for the project. Based on these considerations, specific services or service areas must be identified as the focus for a service design project.

Consider summarizing business goals and objectives on flipcharts or capture them live into a projected PowerPoint slide.

The group can build a shared understanding of these foundations using many different tools. Here are two potential activities:

Stakeholder Mapping

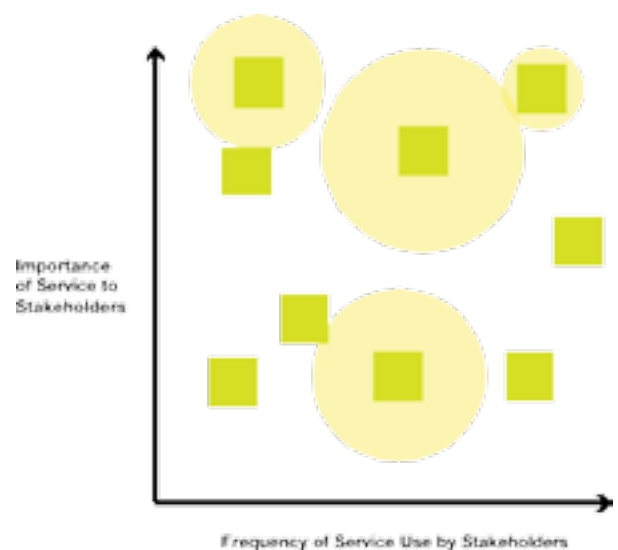
The team identifies stakeholders such as frontline staff, public sector partners and other areas of government, industry associations and individual types of clients. Specific individuals with deep influence and investment may also be identified.

To create a stakeholder map, have individual workshop participants write stakeholders' names and/or organizations on sticky notes (one per note). Consider colour-coding external, internal and client stakeholders.

As a group, post and cluster similar stickies. Create one sticky to represent each stakeholder type.

Then place the stakeholder type stickies on a grid with the x-axis as the frequency of involvement of the stakeholder group (a combination of how many in the group and how often they rely on the service). Include the importance of the service to the stakeholders on the y-axis.

Finally, draw a circle around the sticky for each stakeholder group to represent the level of influence it has on the project.



The Business Model Canvas

Discussing stakeholders sets the stage for capturing the key components of service delivery with the Business Model Canvas [LINK to template]. The Business Model Canvas is used across the world, from Fortune 500 companies to Silicon Valley start-ups. It offers a one-page model of the work of an organization that captures:

- Key Partners
- Key Activities
- Key Resources
- Cost Structure
- Value Proposition
- Client Relationships
- Channels
- Client Segments
- Benefits

Filling out the Business Model Canvas gives the team a shared understanding of the fundamentals of the service organization and of what is offered and how it creates value for clients and the BCPS.

More information on how to create a Business Model Canvas is available from [Business Model Generation](#).

Align Templates

[Partnership Agreement](#)

[Business Model Canvas](#)

Align Examples

[Partnership Agreement](#)

Alignment Deliverables

Deliverables from the Alignment Phase will help prepare any service design project for success and guide the teams' efforts throughout the project.

Some typical deliverables may include:

- Partnership Agreement outlining project fundamentals, team, scope, constraints, budget, etc.
- Workplan showing scheduling and team assignments.
- Outputs from early workshops, such as a Stakeholder Map or Business Model Canvas.
- Communications and Change Management Plan that outlines who, how and when communications will happen, both within the project itself (e.g. with a steering committee, working group) and with the larger organization and any partners.

Alignment Results

With clear expectations, involvement and commitment, the Alignment Phase sets the project on a successful path. Outcomes of good alignment include:

- Buy-in and ownership from executive, other leadership and the organization as a whole.
- Clear expectations and understanding of the project and the benefits of this approach.
- Reduced project overhead and delays due to misaligned expectations.
- Clear commitment to the change effort required in order to invest in service innovation and implementation.
- Increased capability for service design in the organization through partnership with the SDTB, third-party experts, and the ministry's own in-house talent.
- Ongoing commitment and investment in change needed to create the most value from service innovation.

Alignment Guidelines

The Playbook is a guide to service design in the BCPS and the core team may choose to tailor its own approach to service design along the way. The following are guidelines to keep in mind as teams proceed through the Alignment Phase. These guidelines are the key success factors that should be addressed during this phase.

Service Design is Change Management

Designing better services means changing how we work. Successful service design teams work to help the organization adapt to the changes needed for service transformation.

Clear Expectations Are Key

Projects are judged by how well they meet expectations for both the outcomes they create and the approach they use. Setting clear expectations early for executives, teams and the overall organization reduces the risk of misunderstanding later.

Show and Tell Ways of Working

In setting expectations, the SDTB uses a “Show and Tell” approach to demonstrate how service design methods work. They will share stories and case studies of other projects and show deliverables, photos from past workshops and more, in order to prepare the team, sponsors, and others for what will come.

This Work Leads to More Work

Recognize that a service design project often uncovers the need to do more work to support better service delivery.

Share Executive Endorsement with Organization

Have an Assistant Deputy Minister or similar sponsor let relevant areas of the organization know about the project and to outline its priority in the organization so that people clearly understand their opportunity and responsibility to support the work.

Partner for Expertise

Work with partners that have service design expertise to help build internal capability. This partnership starts with the SDTB within GCPE (at least for the first couple projects) but can also extend to vendors or people from other areas of government with service design experience.

DISCOVERY PHASE

During the Discovery Phase, the core team sets out to understand the current state of service delivery. The team needs to understand:

- The business objectives of the ministry and supporting ministries
- The context, connections, process and people who are using and delivering the service
- The behaviours, needs and motivations of key user groups

The core team achieves this by conducting internal interviews and workshops, external interviews and workshops, observation, usability testing, environmental scans, comparative analyses and/or analytics reviews. Methods are determined once the project has begun and vary depending on the project. The range of research needed to gain this understanding depends on the complexity of the specific service and its supporting context and systems.

The focus for the research in this phase is primarily on the service as people experience it, both when they are in direct contact with staff and beyond. The Discovery Phase is the first phase of the BC Service Design methodology because it is important for service owners to understand and see the service from a client and frontline perspective in order to make the best service design decisions possible.

Discovery is the gateway to understanding service performance and opportunity for future service improvements. It helps to:

- Manage risk
- Improve effectiveness
- Generate insights to innovate and improve service delivery
- Find key points in the service architecture to make the biggest difference

Research through the discovery process provides the fundamental foundations to:

- Measure service performance
- Identify areas that work well
- Find new opportunities for improvement

Whether optimizing existing services or transforming entire service delivery systems, discovery is the key to uncovering opportunity.

Because of the close link between insights from discovery and identifying new opportunities, the Discovery and Opportunity Phases often overlap. This overlap is especially common when models of the current state suggest pain points and corresponding fixes that are potential opportunities.

The Discovery Phase can be used as a guide for teams starting their research efforts to improve service delivery. Teams may modify this approach based on specific service insights and measurement needs; however, in order for the

Templates

- *[Business Model Canvas](#)*: One page model of key business drivers for a service.
- *[Research Template Plan](#)*: Summarize and present research to capture insights and build understanding with leadership.
- *[Personas and Scenarios](#)*: Rich user profiles and key client activities.
- *[Journey Map](#)*: Visual map of service experience over time.

Examples

- *[Journey Map](#)*

Further Reading

- *[This is Service Design Thinking](#)*
- *[Service Design Methods & Tools - Research](#)*

project to deliver a complete understanding of the service experience, the project team will want to use most of the methods described in this section. Work with the Strategic Design and Transformation Branch (SDTB) to customize how the Discovery Phase will look for a particular project.

Research Preparation

Once the business foundations for the project (outlined in the [Alignment Phase](#)) have been established, the project team is ready to start research.

Research preparation sets the team up of success for internal discovery and field research. Preparation includes:

- ▶ Selecting the research team
- ▶ Beginning internal desk research such as reviewing past research and familiarizing the team with the broader service ecosystem
- ▶ Creating a research plan
- ▶ Managing logistics
- ▶ Creating a debriefing protocol

Selecting the Research Team

The research team might simply be the core team, or it might be a combination of core team members with other staff from the ministry, program area or Stakeholder working outside of government.

Someone experienced with behavioural and participatory research methods should lead the research team. Often the lead will be from SDTB; however, it may also be a vendor or someone from within the service area.

Even in areas without previous service design experience it is important to involve ministry or program area staff as full research team members, rather than relying completely on SDTB staff or vendors. The investment in research provides the greatest return when staff within the organization are full participants and have their own insights and ongoing contributions beyond the immediate project. These team members also help build the overall service design capability within the ministry and the public service.

Research team members should be comfortable with hearing criticism without needing to defend a program area or service. They should also be comfortable taking on the role of apprentice or learner. Through the research, the team will be learning more about an area they may already be familiar with. In order to truly understand what the experience is like for the client, researchers may need to take a fresh perspective on their core business area or service.

Research team members typically need to be able to work and travel outside regular office hours especially if that is the only time certain clients or stakeholders are available to meet or attend workshops.

Discovery Activities

The key work of this phase is gathering data (e.g. web and call centre analytics), observing interactions in the real service environment and locating pain points. This stage involves internal business discovery and external user research, as well as analysis and reporting of the findings. Key methods include co-design, observation, in-context interviews and data gathering.

The Discovery Phase involves the following activities:

▶ Project Preparation and Logistics

Ensure everyone involved in the project has a clear understanding and expectation of what is required. Prepare plans for internal discovery and field research.

▶ Internal Discovery

Gather existing information or past research from various areas of the program area and ministry. Begin internal research review.

▶ Frontline Field Research

Plan in-depth behavioural interviews, site visits and co-design sessions with frontline staff and clients.

▶ Gathering Metrics

Gather existing data and determine other data gathering approaches that may be required. Develop baseline service measures to evaluate the current state of the service, as well as metrics to measure on an ongoing basis.

▶ Analysis, Mapping and Reporting

Analyze research findings, generate insights and opportunities, begin to map out the service experience, and develop materials for research reporting.

Individuals with statistical analysis, policy analysis and environmental scanning experience are also valuable contributors to the research team.

Internal Desk Research

Internal desk research involves gathering existing information from various sources. An environmental scan or comparative analysis is recommended, including a summary of channels and a list of service interaction types. A review of any past research conducted by the business area can also be useful and insightful to the project.

Environmental Scan

An environmental scan simply places the current service offering in a larger context. It helps to understand the service ecosystem that is contained in the service area. “The Business Model Canvas” on page 24 (described in the Alignment Phase) can provide many starting points for an environmental scan. When conducting an environmental scan, look for:

- ▶ Similar services in other jurisdictions
- ▶ Related services found locally
- ▶ Competitive or comparable services
- ▶ Other kinds of contexts and elements of the service ecosystem
- ▶ Other ways clients currently meet their needs

The environmental scan should report on these elements and get the team up to speed in the overall service domain.

The environmental scan should include an initial assessment of what channels are used to deliver the service and the volume and frequency of use for each channel. In other words: what is the split between web, front counter, call centre and other channels?

As well, the environmental scan should outline preliminary service interaction types. Are service interactions focused on getting information, completing a transaction, or building a relationship? What are the kinds or genres of service interactions involved in the service offering?

Research Review

Service design projects should build on previous investments put into research and performance measurement. The research review gathers further research that related business areas have conducted in the past, and analyses those research findings through a service design lens.

When reviewing past research, be aware of the client segmentation and the research methods used to gather the findings. During review, focus on client behaviours, priorities, satisfaction and expectations. Also look for specific measures of service success, including existing metrics and key performance indicators (KPIs).

Types of Service Interactions

The Federal Government has identified specific government service design patterns which can help teams catalogue the types of service interactions involved.

Summarize key points on sticky notes or in a mindmap and review with the team. Research review may be ongoing as business discovery is conducted and additional research sources are found.

The Research Plan

The research plan outlines the team's approach to filling in the gaps for creating a better service. "The Business Foundations Workshop" on page 23, environmental scan and research review each provide important information and understanding. The research plan outlines what the team needs to do to collect the rest of the understanding required for a successful service design project.

The research plan outlines the goals, approach and logistics for research, and should include:

- Research objectives and key questions or areas of interest
- Project background, including highlights from the research review and environmental scan
- What kind of participants need to be involved and how to recruit them
- The research approach including methods for research and analysis
- Research reporting plans
- Resources required, including team, time and budget
- A schedule for research activities and locations
- Support materials (if ready at this point in time) such as:
 - *Interview scripts and workshop outlines*
 - *Recruiting screener to qualify research participants*

The research plan can be, and sometimes must be, updated throughout the project. After the team completes internal discovery work, has a better understanding of the kinds of questions to ask in the field and the kinds of stakeholders to interact with, the research plan should be updated to reflect this newfound insight.

The research plan is simply a guide. The team may have to adapt on the fly to accommodate unexpected changes in schedules, participants or direction of the research.

Managing Research Logistics

Good logistics will help the team focus on the research and get the most out of the discovery work. Logistics include:

- Participant recruiting and incentives
- Scheduling internal and external participants
- Arranging site visits
- Travel arrangements
- Privacy Impact Assessment (PIA)
- Consent forms and other paperwork (e.g. incentive receipts)
- Travel authorizations

The Service Design Methods & Tools includes more information about internal and field research activities.

The SDTB will help with these steps and details. The ministry or program area core team members are involved in all aspects of preparing for the research. This is especially important when it comes to making the right connections in order to gain access to the right participants for the research.

Creating a Debriefing Protocol

Debriefing is a team review of research activities and findings, held while the research is still fresh. The team should have regular debriefing sessions to summarize research findings, share insights and build a common understanding of the research. Debriefing sessions help build a shared understanding of the key themes of research as they emerge, any concerns surfaced in the research, and allows the team to capture both opportunities and an overall sense of research findings.

Debriefing helps everyone on the team understand the research data, as well as provide the opportunity to flag any particular logistical challenges. It also helps people who are not part of the research effort feel confident in the team and gain an appreciation for the needs, concerns and opportunities arising from the research.

Debriefing sessions should be held daily for the research team and at least weekly with the entire project team. Share the daily debriefing notes with team members who are not able to accompany the field team. This inclusion helps build team connections and assists team members to move quickly when the research shifts from gathering data, to analyzing it and generating insights from a broad understanding of the research.

In the daily debriefing, capture a short written summary of each day's research to share with the larger team. Capture opportunities in the opportunity log. This should be concise bullet points rather than a significant writing effort. These daily records are invaluable in later detailed analysis and reporting.

Opportunity Logging

Opportunities will come up throughout the entire design process. Capture these suggestions in a log rather than restricting conversations about opportunity only to the Opportunity Phase of the process.

Capture the opportunity with a brief word or phrase, a longer note to explain context, the date and who captured the opportunity to allow follow-up. Opportunities may be captured in real time during a workshop or may be captured as part of the daily debriefing.

Internal Discovery

Internal Discovery is aimed at understanding current perceptions and experience of service delivery from an internal perspective. Recommended activities include:

- › [Internal Understanding Workshop](#)
- › [Internal Interviews and Observation](#)

Internal Understanding Workshop

While the Business Foundations Workshop outlined in the [Alignment Phase](#) is mostly focused on a business perspective, the initial Internal Understanding Workshop is focused on a client perspective of the service. This workshop surfaces assumptions and understanding about current clients of the service and their service experience. This is captured through [Preliminary Personas and Scenarios](#), [Journey Mapping](#) and [Empathy Mapping](#). The assumptions gathered in

this workshop will be built upon through actual field research. The field research will either challenge or confirm the initial assumptions.

This initial workshop is not a replacement for actual frontline research; service design projects must include field research as part of the discovery process in order to mitigate project risks and increase insights. Also, more than one Internal Understanding Workshop may be held to accommodate larger groups with many service areas.

Preliminary Personas and Scenarios

Workshop participants use the provided persona template to create initial profiles of key stakeholders, with a focus on stakeholder goals, motivations, and scenarios or situations that bring them into the service.

Learn more about personas and access the persona template in the [Service Design Methods & Tools](#).

Preliminary Journey Mapping

A journey map shows the overall experience of a person engaging in a service. It illustrates the sequence of events and shows specific interactions in specific channels. It may also include other details like emotional reaction at a specific stage, what a person is thinking, doing and feeling, and more. Read more about journey mapping in the [Service Design Methods & Tools](#).

At this stage of the research, a preliminary journey map can be created based on the knowledge and experience from internal participants. Once the workshop participants identify specific citizen and staff profiles (personas), they can start to outline the service journey for that individual. The journey provides additional details about the service experience by breaking down a specific service journey over time. Using sticky notes on long sheets of packing paper is often easiest for creating a journey map.

The Internal Understanding Workshop includes:

Participants: Core Team, Service Delivery Area Representatives

Time: Half to full day, depending on complexity of service.

Materials: Persona Worksheet, 3M Super Sticky Notes in five colors. Long sheets of packing paper for breakout groups. Room with wall space large enough to post paper.



Based on the perspective of the citizen and staff profiles, teams should focus on capturing the major steps or phases of a service journey and then fill out specifics using sticky notes. These steps or phases serve as columns. Additional rows, or streams, create more detail for each stage of the journey. The streams serve to connect each stage in order to visualize an overall experience.

Typical streams captured in an early mapping workshop are:

- ▶ Actions or Tasks: what are the specific things someone does during this stage?
- ▶ Tools or Channels: how do they perform a task? What tools do they use (like a mobile phone, a web app or a paper form?) and what channels support those tools?
- ▶ Thinking: what would the citizen think at this stage?
- ▶ Feeling: how would the citizen feel at this stage? How stressed are they?
- ▶ Needs at that stage of the service journey: What are specific needs, goals, or motivations at this point in the service journey? What would need to happen for the overall journey and the specific stage to be successful for the citizen?

Other streams may be captured based on the needs of the project, such as quotes, stress level, defining moments, and alignment to key insights and opportunities. Work with the SDTB to determine which streams to include.

Note that these maps are only preliminary and they are not informed by direct citizen research. Future discovery work with citizens will allow a deeper and more accurate view of the citizen journey.

These first preliminary maps are exceptional for bringing together different business areas that unifies vision and creates links in the organization that reflect the experience rather than the organization chart. These maps surface assumptions and build a common understanding of the citizen's needs. This shared expectation and perception of the service experience will help shape the field research.

Capture these common assumptions and areas of disconnection by annotating the map itself or creating an accompanying document or deck outlining specific areas of focus.

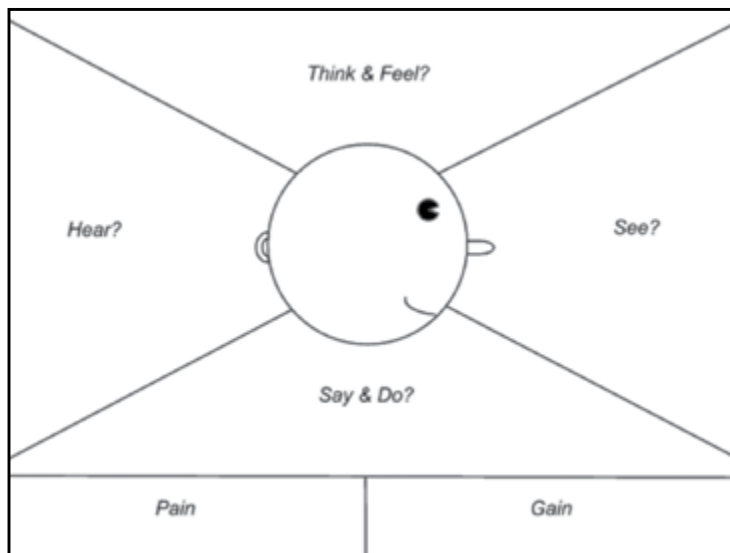
Empathy Maps can be a valuable source for many of these details.

TIPS

- ▶ *Document the map by taking photos at the end of each day or session.*
- ▶ *When work is complete, roll up the large sheet of packing paper to transport the map.*

Empathy Mapping

Empathy Maps are a supplementary tool that can work with personas and journey mapping to build empathy for clients and other stakeholders. Empathy mapping may lead to specific persona details, be used as a source for journey mapping details or may be used after journey mapping to consolidate pain points, needs, thoughts, feelings and surroundings at specific journey stages for specific stakeholders. Empathy mapping may also be used during business modeling to better understand key clients and the service value proposition.



Empathy Maps are described in the book, *Gamestorming* (p. 65), as well as on the [Gamestorming book website](#).

Empathy Map courtesy of XPLANE

Internal Interviews

The team should now have an understanding of the business foundations for the project, the broader context for the service, and an understanding of how people within the business perceive clients and their experiences.

Teams may still have areas where they need greater understanding or need to explore a sensitive topic outside of a group situation. These answers can come from interviewing internal stakeholders to understand more about their business needs and operations. Interviews with stakeholders can also help include a variety of perspectives, and develop understanding and buy-in for the service design project.

Note that interviews with frontline staff or others located in field offices may be combined with client field research.

The number of internal interviews will vary based on the project—it is recommended to interview both service owners, such as directors, as well as service delivery staff members from each service area affected. For areas at the core of the service experience, more individuals may be interviewed or involved in workshops.

Work with the project lead from the SDTB to develop an interview script that will be used during the internal interviews.

The Service Design Methods & Tools contains additional tips on [how to conduct discovery interviews](#).

Outcomes and Output from Internal Discovery

Internal discovery assists with understanding:

- ▶ The fundamentals of the service operation
- ▶ The broader context where the service is situated
- ▶ The perceptions and assumptions about clients and their needs

Internal discovery helps build:

- ▶ Shared understanding of the service for the team and the business areas involved
- ▶ Opportunity for the team to practice research methods, such as co-design, in workshops and behavioural interviews in internal context
- ▶ The foundations for effective fieldwork
- ▶ Buy-in from participating business areas

Internal discovery documents findings through:

- ▶ A map of key stakeholders
- ▶ A set of goals and objectives for business areas
- ▶ Rough initial model of client needs and their service journey
- ▶ A Business Model Canvas summary of the service area

Field Research

Field research is about going out into the world and seeing services from the outside-in.

Key activities include:

- ▶ Site visits with observation and interviews with frontline staff and clients
- ▶ Co-design workshops to look at current service experience and explore potential service improvements with clients and frontline staff
- ▶ Regular debriefing to share the findings from the field team to keep everyone on the project involved in the research
- ▶ In-depth client interviews

Investing in field research will provide the most benefit with good preparation, planning and logistics.

Plan on at least:

- ▶ Two or more site visits
- ▶ One or more co-design workshops with clients
- ▶ Three to four interviews per client segment and frontline staff
- ▶ One or more co-design workshops with frontline staff

Larger projects with more complexity may require more research.

As the team conducts field research, be sure to maintain an [opportunity log](#) to capture specific ideas and suggestions for service opportunities.

The team will gain better insights with additional activities. Manage the balance between gaining insight and reaching a point of diminishing returns. The team will be ready to begin prototyping and blueprinting a new service when there is a sense of the service reality on the frontline and the overall client experience over time.

Fieldwork Preparation

As part of the Research Preparation, it is recommended that the team complete a [Research Review](#). If the team has not yet done a research review, it is important to know now what has already been done to understand clients, stakeholders and the service area. Take some time to review previous research so that the team's own research efforts will complement this previous investment and insight.

To prepare for the field research, the core team should work together to:

- ▶ Refine the research plan based on insights from the internal discovery work.
- ▶ Complete a [Privacy Impact Assessment \(PIA\)](#), if required, and ensure that the team has the necessary items ready such as consent forms (including photography, audio or video), incentive receipts and other paperwork.
- ▶ Procure incentives for research through the ministry Finance Department or Strategic Design and Transformation Branch. Incentives can include things such as gift cards (if appropriate), snacks, coffee or lunch. Incentives are not appropriate to use for work conducted with other government jurisdictions and many industry or trade associations.
- ▶ Give as much advance notice as possible for site visits and other scheduling; preferably two or more weeks.

Field Research Activities

Key field research activities include in-depth behavioural interviews, site visits and co-design workshops.

In-Depth Behavioural Interviews

Interviews are a research staple and interviewing skills are useful throughout service design projects. Interviews are time consuming, so the core team should consider using them to fill in gaps or gain greater depth of insight that builds on site visits and co-design workshops.

During interviews, focus on behaviour and ask about stories of recent service experiences. Focus on what people actually did and their reactions to that experience, rather than asking about hypothetical situations. What people actually do in a certain situation, and what they think or say they do in a hypothetical situation, can prove to be very different.

To prepare for conducting interviews, the research team should create interview scripts. More than one script may need to be created depending on the user groups being interviewed. The project lead from the Strategic Design and Transformation Branch will lead the development of the interview scripts and will require the rest of the team's help to ensure that the questions being asked align with the research goals of the project, outlined in the research plan.

The research team should create open-ended questions to allow for a more fulsome conversation, and discover additional insights from the interviewee about their experiences. Typically, the interview script starts with questions and prompts that are easy and introductory in nature (e.g. "Tell me about yourself and your team."). The script can then progress to more specific, in-depth questions (e.g. "What in particular is the most valuable part of that suggestion?" "Can you tell me more about your experience?"). Use lots of why questions to probe the reasons someone made a specific suggestion (e.g. "Why is that important to you?" "Why would you choose that option?"). Close-ended (yes or no) questions are good to confirm what has been heard or to conclude the discussion on a particular topic before moving onto the next discussion point.

The script should be used only as a guide to a genuine conversation about the topic, rather than a verbal questionnaire. It is not necessarily to be used from top to bottom without flexibility. The interviewer (typically the project lead from the Strategic Design and Transformation Branch) often asks other questions that are not

Further Reading on Interviewing

- ▶ *Chapter 6 of Observing the User Experience, 2nd Ed. (Kuniavsky, 2012)*
- ▶ *Interviewing Users (Portigal, 2013)*
- ▶ [Taking it to the streets](#)

part of the original script. This is encouraged, as it is good practice to further investigate areas of interest to the project if they happen to come up as part of the interviewees' response. Besides being more authentic and more natural, this will help to gain greater insights while following up topics of interest with additional questions.

Work with the project lead from the Strategic Design and Transformation Branch to learn more about how behavioural interviews are typically conducted.

The Service Design Methods & Tools also has additional [information about conducting interviews](#).

Site Visits

Site visits give a crucial perspective on service at the point of delivery. Direct contact with the service experience helps teams see new opportunities, and appreciate the actors and their needs, priorities and context. Site visits are a quick way to see clients, frontline staff, and the environment, where they interact all on the same day.

Site visits may take place at the service delivery point or arrangements might be made to visit a home, business, trade association or other client location.

A site visit may be as short as an afternoon or as long as three days, depending on the scope of the services offered and the volume of service traffic. During slow periods, teams may need to spend longer visiting with a variety of clients.

At a minimum, teams should identify two locations for site visits. Consider multiple site visits when there are service points in significantly different environments (such as ServiceBC), the ministry's own program area counters, and third-party service providers. Also consider both rural and urban locations.

Typical projects in the past have included a location in the Victoria area, one in the Lower Mainland and one in the Interior. Some teams have visited smaller rural centres, as well as major regional hubs such as Prince George, Kamloops and Kelowna.

To gain as broad an understanding of the service as possible, choose locations based on time, budget and location of stakeholders. It is important to include insights from rural or regional centres that may be missed in the larger populations of the Lower Mainland and South Island.

Site visits provide the opportunity for frontline staff interviews, client intercept interviews, observations and shadowing. Some site visits will provide the opportunity for a [co-design workshop](#).

Site Visit Preparation

In preparation for site visits, work with the Strategic Design and Transformation Branch to:

- ▶ Develop a shortlist of possible locations.
- ▶ Contact the responsible executive or manager for each location and brief on the purpose, timing and typical activities of a site visit. Explain how much time and commitment is needed from staff, and collaborate with the executive or manager to help plan site activities.
 - ▶ *If they are comfortable with the visit, work with them to schedule it around the project timelines.*
 - ▶ *If they are uncomfortable with the visit, work to understand the reasons why and see if the team can accommodate their concerns. In the process, the team will learn more about the service delivery area and the sensitivities involved with clients and staff.*
- ▶ Set expectations among the staff at the site. Many frontline staff will be self-conscious of being judged or evaluated. Ensure that the value of obtaining a frontline perspective for service design is communicated well.
- ▶ Arrange an onsite contact that will host the team during the visit. Work with the host in advance of the visit to help understand the site layout, services provided, staff roles and typical clients and interactions. This will help focus the team's time most effectively.
- ▶ Schedule any meeting spaces for interviews, if needed, and a home base where the team can leave personal items.
- ▶ Think about the questions to ask staff and clients coming into the office to access services. A full interview guide may not be necessary but it is a good idea for the team to have some key questions in mind and be on the same page.

Observation and Shadowing

What people say and what people actually do can be very different. Observation and shadowing help to understand service in context beyond what people say in an interview.

Observation may be independent; with the researcher working on their own. Or it may be guided, where the observer shadows a client or frontline staff person.

When shadowing, it can be helpful to explain what is happening to clients coming in. For example, the person shadowing could say "I'm learning about how things work, just like someone new on the job. So I'm observing different people on the job."

Observations work in tandem with interviews. During interviews, areas or topics to observe may be found. As observations happen, things may be seen that can be asked about in an interview.

Observers should look for several factors in service delivery:

- ▶ **People, Places & Things**
What are the tangible, physical aspects of the service experience? Who is involved, where do they interact, and what objects, tools or things do they use to get the job done?
- ▶ **Activity, Tasks, & Flow**
What are the activities that each person does in the service? How does someone move through the service experience?

What is the process? What are the specific tasks and the flow between linked tasks and activities? Are there interruptions in flow, challenges or errors in tasks or activities? What are the most critical actions? Where are there failures? What alternative choices or paths are available?

► **Context**

What are the broader elements that set the context of the service? Are there social, technological, economic, environmental or policy considerations that impact service delivery? What are the larger assumptions and expectations at play? What establishes and frames the service context for clients, frontline staff and management?

► **Meaning & Emotion**

What is the significance of the service? What does it mean in people's lives? How do they feel about the service and related parts of their lives? What are the emotions over time? What are the most stressful points in the service experience (including outside the service delivery point)?

► **Measurement**

Observation can help explain what is measured and what matters to people. If what matters is not measured yet, then observation allows for exploration to determine how the ministry might use existing measures or new ones to help monitor the service experience.

Further Reading on Observation

- *The Service Design Methods & Tools* has additional details on [conducting observation and shadowing](#).
- *Observing the User Experience, 2nd. Ed. (2012)* by Kuniavsky

Capturing Observations – Photos, Audio, Video and Sketches

Capturing observations is important for the team's own reference throughout the project, but it is also just as important for sharing with other decision makers and stakeholders in the ministry.

Take photos, notes, video or record audio of the service experiences. It may also be useful to sketch things like floor plans or the sequence of events after observing.

The following are some tools to consider for capturing observations:

- Laptop for notes. Taking digital notes makes it easy to share with the rest of the team right away.
- Voice recorder.
- Digital camera.
- GoPro camera to collect service from a citizen's perspective
- Smartphone for photos (test first in field conditions before using).
- Video or voice recordings

It is usually a good idea to observe or shadow in pairs so that someone can act as the recorder while another person interacts with the participant. If that is not possible, consider digitally recording the conversation as it is occurring, and writing down thoughts and notes right after an observation so the information is still fresh. Having more than two people observe can overwhelm the participant.

Client Intercept Interview

An intercept interview happens when the researcher asks citizens on site to participate in a short interview. Intercept interviews are similar to other

behavioural interviews—the focus should be on the actions that the participant has recently experienced.

Intercept interviews need to be short and focused, given that participants will not have planned on taking time to talk. Intercepts can last anywhere from 5 to 15 minutes. Participants may begin speaking with the interviewer while they wait for their turn at a counter, but may not be able to complete the interview if they are called during it.

Intercept interviews allow researchers to speak with people at the point of service, providing valuable insights to the citizen's experience. Intercept interviews also provide an easy way to speak with qualified participants rather than having to recruit participants separately.

Compared to general interviews with citizens and stakeholders, responses are often more focused since people are dealing with the service at the same moment the intercept interview is occurring.

It also may be possible, at times, to follow-up an intercept interview with an invitation for a longer interview by phone or in person.

Frontline Staff Interviews

Frontline staff have the closest relationship with service delivery in government. Take time to involve them in the research through observation, shadowing and interviews.

Frontline staff interviews can be combined with observation. Have the individual demonstrate elements of their work that is relevant for the project.

Frontline staff are a key source for suggestions of service improvements and in helping identify service challenges.

Co-design Workshop

A co-design workshop is an opportunity to bring people together and design with them rather than simply for them. Co-design workshops are a great option for early focus groups where the team is generating insights rather than getting a response for something that is already designed.

However, co-design should go far beyond the initial project team. The intent is not designing for the team—it is about designing for clients and frontline staff to deliver a better service experience. Co-design may include frontline staff, clients, or even a mix of the two, as solutions will be even better when the team designs with them.

“The Business Foundations Workshop” on page 23 from the Alignment Phase is a co-design workshop and follows this general structure:

- ▶ Introduction of the team and the project.
- ▶ Setting expectations.
- ▶ Providing brief background information.

Tips for Working With Frontline Staff

- ▶ *Share how valuable a frontline perspective is to the team and the work.*
- ▶ *Express appreciation for the time they are taking to share their insights.*
- ▶ *Interview staff at their counters or workstations as it provides a greater opportunity for observing their work in action; however, respect their priorities for serving clients.*
- ▶ *Ensure that there is a clear understanding with staff and management about making any adjustments to performance measurements during interview time, such as time on calls or number of calls for a call centre representative (also known as the [Interviewer Effect](#)).*
- ▶ *Understand the privacy needs of clients – in some cases, the interviewer may be able to be with the frontline staff person while they serve a client; in other cases the interviewer may need to leave the area to provide privacy for that client.*

Field Research Example: Helping parents make decisions about schools

The Ministry of Education wanted to support parents in making decisions about choosing a school. The initial concept was to allow parents to see all the schools on a map and then provide access to [the Fraser Institute](#) or Provincial Exam scores.

The research team held interviews and co-design sessions with teachers, administrators and parents. What they found through this research is that parents are looking for other kinds of information – information related to school culture, communication, policy (like how the school handles bullying), program richness and logistics around things like childcare and bussing.

As a result, the Ministry of Education developed a resource for parents to provide more in-depth information about local schools, as opposed to only focusing on school ratings and Provincial Exam scores.

- An activity where participants express their needs and wants by making a concrete artifact. This may be one of many kinds of artifacts, such as journey maps, personas, sketches, storyboards, and business origami.
- Discussion and explanation of artifacts.
- Possibly a second round of making artifacts, using the same method or using a new method that builds on the previous one (for example, journey maps may build on storyboards).

Creating tangible artifacts with people helps them articulate ideas that they would struggle to express in an interview setting. Co-design sessions are about making things together that help tell stories, and explain needs and hopes of the users.

A typical co-design workshop includes creating preliminary personas and journey maps. However, co-design workshops can go beyond personas and journey maps to describe the current state of the service. They can also help with identifying pain points and designing potential solutions. These sessions may include methods such as a values collage, paper prototyping, sketching, storyboards or tangible service modeling, such as Business Origami.

See the [Service Design Methods & Tools](#) for more on these methods.

Co-design Facilitation

The key to all successful co-design sessions is facilitation. During co-design workshops, members of the design team serve as facilitators; working with a group and generating new ideas and insights by creating concrete artifacts together.

Facilitating a co-design session is similar to other facilitation.

- Be neutral rather than advocating a specific predetermined outcome.
- Encourage participation across the group and gently deter those who may dominate the conversation.
- Set clear expectations and structure for the session so participants know to expect hands-on work. Include a description of the purpose of the session and outline the goals and value of the session for both the project and for participants.
- *Use laddering*: taking a suggestion or design direction and asking why the person suggested it, then continuing to probe and ask why as to uncover the core need expressed by the service suggestion.
- Capture suggestions, concerns and opportunities as they arise during the workshop.
- Additional facilitation considerations particular to co-design are:
 - Be clear about how session ideas will be used, especially in outlining how specific ideas for features, functions, policy, and other areas will be incorporated in the final service.
 - Provide well-defined examples and demonstration for any specific methods used so that people are clear about what they will be doing during the exercise.
 - Explain that the artifacts will help the team understand the needs and reasons for suggesting a specific feature. While not every feature will be implemented, the team will work to solve the need expressed.

Co-design Methods

There are dozens of co-design methods and exercises. The methods that are used most often in projects in the BC Public Service (BCPS) include:

- Journey mapping
- Personas
- Sketching and storyboards
- Business Origami (a paper-based service prototyping method)

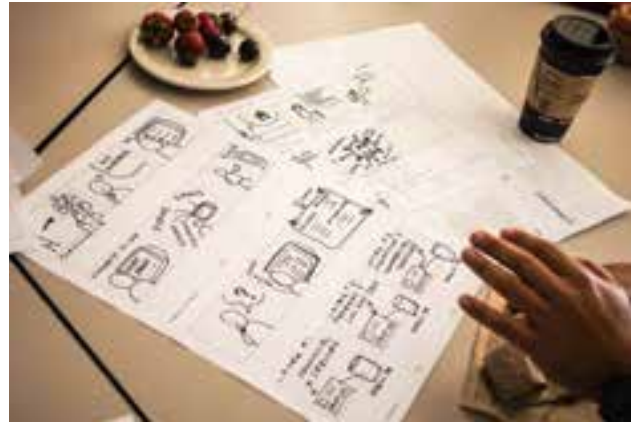
Personas and journey mapping are described under the [Internal Understanding Workshop](#). They are especially useful for surfacing internal assumptions and perceptions about the service.

Sketching and Storyboards

Sketching and storyboards are used so that co-design participants can draw ideas often using simple images. Participants can draw a concept, an idea, a feature or element of a service. The element could be a floorplan, a webpage or a form.

When participants start to tell stories about current or future services, they may use storyboards: a sequence of images similar to a comic. Storyboards allow participants to relate different parts of a service to one another and show the service experience over time.

The Service Design Methods & Tools has more detail [about sketching and storyboards](#).



Business Origami

Business Origami is a rapid service prototyping method. It uses paper shapes to represent the users and elements of a system, including people, places, things and the interactions between them. The paper cut-outs are arranged on a horizontal tabletop whiteboard to allow different scenarios and relationships to be visualized.

Because co-design participants are using premade shapes, they can engage in visual, tangible thinking without being self-conscious about their ability to draw or sketch. Business origami also allows people to work together in a group much more easily than in sketching or storyboarding.

The main outcome of a business origami session is a shared understanding of the system by participants. Further deliverables are needed to clarify and communicate that understanding. Creating journey maps after a business origami session is a great way to communicate to others what was learned through the business origami exercise.

The Service Design Methods & Tools has more details about [running a business origami session](#).

More Co-design Methods

- ▶ *The Service Design Methods & Tools also contains [a section on Co-design](#).*
- ▶ *The book [Gamestorming](#) (Gray, Brown, & Macafuno, 2010) contains many more tools that are useful in co-design.*



Co-design with Frontline Staff

When frontline staff participate in a co-design session, ensure that the core team conveys the value of the frontline perspective and the contribution it has to the project. Be clear about how their input will be used and ensure that leadership endorse and encourage participation. Be cautious about including supervisors or managers in the actual sessions. Some staff may not be comfortable expressing concerns about current operations if their manager or senior leadership are present.

The goals of designing with frontline staff include:

- ▶ Generating insight with those closest to the client and the service delivery process.
- ▶ Reducing risk by ensuring that ideas and opportunities reflect current service needs.
- ▶ Building buy-in through participation.
- ▶ Gathering employee perspective in service delivery (effective new service models must work for employees as well as improving the client experience).

Co-design with Clients

Co-designing with clients will allow the team to gain significant insights and accelerate service design efforts by involving them directly in the design process.

There are four key considerations for co-design with clients:

1. Help clients feel confident and welcomed in contributing ideas for improved services. Reassure clients that their perspective is important and ensure that, as the facilitator, you are facilitating their ideas rather than advocating your own.
2. Manage client expectations about the purpose of the co-design session—the objective is not to catalogue complaints but to explore new opportunities and ideas. Capture concerns, but do not dwell on them. Shift the conversation to client ideas for addressing concerns, rather than focusing on the criticism itself.
3. Manage expectations about how the suggestions from the session will be used. Explain that while some ideas may be used as suggested, most suggestions are combined with other ideas.
4. Use co-design to spark conversations about underlying needs. Use laddering to probe the reasons why someone made a specific suggestion. Consider using questions like:
 - ▶ *“What kind of difference would it make for you if that feature existed today?”*
 - ▶ *“Why is that important to you?”*
 - ▶ *“What in particular is the most valuable part of that suggestion?”*
 - ▶ *“How does this help you?”*

Probing beyond a client’s first answer will likely be required to understand the client’s deeper underlying needs. This is how the team will find new opportunities, and connections between these deep needs and a variety of client suggestions.

Co-Design With a Group of Staff and Clients

Bringing clients and staff together is a powerful combination and will generate ideas that neither group will create on their own. This combination takes more management and facilitation skill to foster success. The facilitator will want to be comfortable co-designing with client groups and staff groups separately before bringing them together.

When facilitating a combined session, ensure that the team manages the tendency of clients to criticize and of staff to feel defensive. Brief participants in advance and help them to see the session as an opportunity for their own voices to be heard.

Help staff to take on a neutral position, welcoming concerns and suggestions as areas for improvement and generating valuable insights, rather than as personal criticism.

Metrics Research

While government often collects service data, it is important to understand what data is available and what data is important to meaningful metrics for the service experience.

Some metrics set overall context (e.g. the number of K-12 students in British Columbia) while others provide direct or indirect measures of the service experience.

The core team will develop baseline service measures to evaluate the current state of the service. As they monitor the service experience, the team will also develop metrics to measure on an ongoing basis. These measures must be holistic and include both quantitative and qualitative data that evaluate perceptions, descriptions and outcomes.

Data may be quantitative (measurable by numbers) or qualitative (measured by description). Quantitative data will often show what happens, while qualitative data will show both why it happens and reveal new opportunities.

Performance data typically measures three things:

▶ Perception

What clients or staff think and feel about the service. Often surfaced in surveys and in qualitative interviews and co-design sessions.

▶ Behaviour

What clients or staff do: observed behaviour during site visits and analytics or metrics from the service systems. May also develop descriptive measures based on *task-based usability testing*. Some survey elements will include self-reported descriptive data. Use this self-reported data, but be aware that people’s ability to accurately self-report is often limited and can cause biased results.

▶ Outcomes

What are the results of the service? What value is created for clients and for government? What policy outcomes are achieved? Connecting perception and behaviour metrics to intermediate and final outcomes may be needed to show the relationship of the service to desired results.

While the outputs of a service are often descriptive data, outcomes can be far harder to measure. Be aware that the outcome measures will likely only capture some aspects of service quality and success, while other important outcomes will be less measurable, but still valued by clients, frontline staff or government.

Direct causal relationships between service delivery and benefits for B.C. may be challenging to establish. Many times teams will see positive correlations, but will be unable to definitively show cause.

Sources of Measurement Data

	Quantitative	Qualitative
Perception	Surveys	Surveys, Interviews, Co-design
Behaviour	Analytics, Task-Based Usability Evaluation, Surveys	Interviews, Observation, Co-design, Surveys
Outcomes	Analytics, Randomized Trials	Case reports

Bodine, Kerry (2013) From User Experience to Customer Experience. Forrester Research Keynote, Service Experience Conference, October 4, 2013, San Francisco.

Surveys

Surveys can gather data from a wide variety of respondents. These large sample sizes permit quantitative analysis of survey responses. However, remember that survey responses are often biased based on people's perceptions and their frame of reference. Surveys must be used, along with behavioural analytics and qualitative field research, in order to gain a complete picture of the service experience.

The preferred service quality survey instrument is based on the established SERVQUAL approach developed by Zeithaml, Parasuraman & Berry. SERVQUAL measures five factors of the service experience, known as RATER:

1. **Reliability**
How reliable is the service? Does it deliver on its promises? Is it timely, consistent and accurate?
2. **Assurance**
How trustworthy is the service? Does it inspire confidence? Are staff trained, professional and respectful? Is privacy, safety and security managed well?
3. **Tangibles**
How is the service represented physically, through signage, counters, design of screens, voice prompts, etc.?
4. **Empathy**
Does the service treat clients as individuals? Do people feel understood and listened to?
5. **Responsiveness**
How willing are service providers to help? How flexible is the service? Is it able to respond to specific needs and situations? Can it adapt and change through the service journey?

The Institute for Citizen-Centric Service (ICCS) offers a RATER-based survey instrument for the public sector called the Common Measurement Tool. This instrument is available for free to the BC Public Service from the ICCS. It is recommended to adapt the instrument, if needed, to correspond to the context and specifics of the business area's service journeys.

Service Analytics

Analytics measure specific descriptive data. They are measures of behaviour in the system and are less subject to reporting bias than self-reported surveys. However, analytics may still be biased in how they are designed, selected, collected, measured, analyzed or reported.

Analytics may come from web analytics, case management tools, call centre logs or other data sources.

There are two main challenges with analytics:

- ▶ Getting access to the right data.
- ▶ Accessing data may be difficult, especially across organizational boundaries.
- ▶ Filtering meaningful data from the noise.
- ▶ Most service areas have vast amounts of data available. Selecting the right data and relationships can be challenging.

Meaningful Metrics

Meaningful metrics reflect value for the client as well as for government. This shared value is critical for guiding and sustaining service transformation. Metrics that do not include the client experience often create incentives for frontline staff to actually provide lesser service.

Ensure that overall metrics incorporate feedback and insight from clients, frontline staff, and management. Avoid arbitrary number targets such as a “10% decrease in service costs” in favour of measures that reflect more effective services.

Hold a [Metrics Workshop](#) after the initial research analysis and journey mapping to design metrics that matter most in the service experience.

Other Data Gathering Approaches

Some service areas may benefit from additional data gathering methods, such as randomized trials, long-term case reporting and big data analytics. These methods are beyond the scope of this release of the Playbook. It is recommended to [work with BC Stats](#) for more advanced quantitative data gathering methods.

Residential Tenancy Branch Case Study 2013

From the Strategic Design and Transformation Branch

When we asked the Residential Tenancy Branch (RTB) for measures for success, they had metrics both internally and from Service BC about landlord and tenant disputes. However, these metrics often measured different things, expressing a different understanding of success. We also had a different understanding of the client experience through field research in the RTB offices and call centre.

We worked with RTB directors and frontline staff in a workshop to more clearly define success. One specific measure that we arrived at was form success and failure: what do errors look like and how could we measure them? This shared understanding helped RTB get a sense of what was possible in the end.

One of the key measures was form completion—up to 75% of paper forms had errors when they were submitted at the counter. Improving form completion would improve the overall experience and decrease staff time needed to help applicants.

With 100 clients, the service design team created a baseline measure for the current form. They created a prototype smart form, with links to supporting content. They were then able to measure and improve on the prototype. Applicants understood the new form better (they asked fewer questions) and they made fewer legal errors (though clerical errors, like typos, were still seen).

RTB used this information to consider a number of options for service improvement. They considered having staff in the waiting area to help people with filling out the forms, but instead decided to focus on improving the online application as an improved self-serve option, as this was seen as having a broader benefit to citizens.

Analysis and Reporting

Throughout the discovery research, the core team will be analyzing research findings through regular debriefings and logging opportunities. Once the initial discovery research is complete, the team will need to further analyze the findings and report out on those findings to others.

Analysis makes sense of the data gathered during research, and generates insights and opportunities for the team to take forward in designing new service elements.

The team will want to report on the analysis to communicate the insights to others. Typically, a series of analysis workshops are held to most efficiently build a shared understanding and meaning of the research findings.

Further Reading

Here are a few suggested books and articles related to metrics and service design:

- ▶ *Delivering Quality Service: Balancing Customer Perceptions and Expectations* by Zeithaml, Parasuraman & Berry.
- ▶ *Quantifying the User Experience: Practical Statistics for User Research* by Sauro
- ▶ *Evaluation by design for public services: Exploring the need for a culture of service assessment* by Maffei, Villari & Foglieni in [The Swedish Design Research Journal](#)

Analysis Preparation

To prepare for analysis:

- ▶ *Assemble and share research notes, photos and other data. This is when the debriefing summaries become invaluable in rapidly reviewing research material from when the team was on the road.*
- ▶ *Arrange for transcription of research. It is best if transcription is ongoing during field work – upload audio files soon after interviews to prevent a transcription bottleneck.*
- ▶ *Book space, schedule workshops and invite analysis participants.*
- ▶ *Conduct statistical analysis of quantitative data.*

Analysis

Debriefing Accelerates Analysis

During the research portion of Discovery, analysis starts with daily debriefings. This early conversation among the team begins to capture insights and opportunities noted during fieldwork and internal workshops and interviews.

Regular debriefing sessions after research gathering activities, speeds up analysis time significantly.

Continue The Opportunity Log

Continue to capture individual suggestions and opportunities in the opportunity log during analysis. This log will provide a critical source of concise information during the Opportunity phase.

Research Analysis Workshops

Work together as a team in a series of workshops to gain the most benefits from analyzing the research. The first workshops cover broad issues and work down into details to capture overall trends, themes, issues, concerns, insights, ideas and opportunities.

Analysis workshops are a great way for bringing the whole team, and even other stakeholders, together to create a shared understanding and ownership of the research and insights.

The first analysis workshops generally take anywhere from a half-day to three days, depending on the amount of material the team is working with. It is best to find a dedicated space to run the workshops in order to set up a “war” room. This will make multi-day analysis workshops easier to manage.

The following steps are typical for a research analysis workshop:

1. Gather Source Material

Post research notes, debriefing summaries, photos, and transcripts for the team to review. Also include preliminary maps, personas, and models from earlier workshops.

Providing source material in advance of the workshop for individual team members to review can be very helpful especially if those team members were not involved in the research directly.

2. Surface Observations and Insights

An observation is something a team member observed directly; while an insight is an idea, principle or application of that observation in finding opportunities and solutions. This session welcomes both opportunities and solutions, but consider using colour coding to distinguish between them.

Use sticky notes to write observations and insights (one per note) based on each team member’s review of the research notes, debriefings, and other source material, including the team’s own recollection.

Highlight or annotate notes and transcripts as they are reviewed. Create a reference on the sticky to the source material when possible. Drawing from the source material, work to create as many observations and insights as possible in the time available. As observations and insights are surfaced in discussion, the team may want to explore the different aspects and dimensions of the service experience by using the following information and tools:

- a. **The Fieldwork Observation Elements**
 - i. People, Places, Things
 - ii. Activity, Tasks and Flow. Sequence.
 - iii. Context and Environment
 - iv. Meaning and Emotion
 - v. Measures and Metrics
- b. **Empathy Mapping**
 - i. Client types / Personas / Segments
 - ii. Thinking and Feeling
 - iii. Seeing
 - iv. Hearing
 - v. Saying and Doing
 - vi. Pains
 - vii. Gains
- c. **RATER**
 - i. Reliability
 - ii. Assurance
 - iii. Tangibles
 - iv. Empathy
 - v. Responsiveness
- d. Channels or Locations
 - i. Web
 - ii. Mobile
 - iii. Email
 - iv. Mail
 - v. Call Centre
 - vi. IVR (Interactive Voice Response)
 - vii. Front Counter
 - viii. Back Office
- e. **Service Architecture**
 - i. Client Interface
 - ii. Internal Operations
 - iii. Policy and Strategy
 - iv. Organizational Structure
 - v. Legislation and Regulation

These factors are prompts for the team to start their analysis. Viewing different dimensions of the service experience will help produce better insights and opportunities instead of only using one perspective.

Continue capturing opportunities as they are suggested during analysis, dedicating a specific sticky colour or location for these new opportunities to later include in the opportunity log.

3. Affinity Grouping

Use the first batch of sticky notes to create groupings (or clusters) of related observations and insights, clustering the ideas based on their similarity to each other. Work in parallel, with all participants reading stickies and moving them into clusters. Label these clusters as they form, and announce the cluster to the workshop attendees so that they can add their own stickies to that grouping. The [service experience dimensions previously listed](#) are good starting points for clustering as well as prompting specific observations.

As clusters are created, additional observations and insights will often be generated. Add these to the clusters.

Once the workshop attendees reach a point where most of the notes are grouped, capture these clusters by taking photos of them. This will allow the team to refer to the clusters later when doing further analysis, and to share the clusters with other people post-workshop.

4. Themes and more

Next, walk participants through the clusters and discuss them. Participants need to think individually about what stands out for them? What are the themes, insights, principles and opportunities that stand out to the group? Capture the discussion in real time. Take turns being the scribe or have a dedicated scribe if one is available.

5. Incubate

The team will spend a lot of time together as well as with the research materials so incubation time will be needed. Take a little time away from the research analysis to let the team members think about different ways to draw connections and generate insights.

6. Re-sort and Recapture

After incubation, and if time and energy permits, consider re-clustering sticky notes with a fresh perspective. While discussing the themes, the team is likely to see new patterns emerge. As the team builds on the previous work, and as understandings and insights grow and expand, re-sort into new clusters. Capture new themes, insights, principles and opportunities.

7. Task Analysis (optional)

If the team is working on a specific service flow in detail, they may find it useful to catalogue at a more granular level the specific tasks and activities that individuals go through, focused on tasks in particular. For example, taking a number at a front counter, waiting, filling out a form, visiting with an information officer, providing background documents, proving identity, etc.

This level of detail may be more than what is needed at this time, but can be invaluable for making design decisions and prioritizing features later in the process.

The Service Design Methods & Tools has more information about task analysis as part of [creating Mental Models](#); a detailed model that aligns tasks with organizational capability.

8. Revise Personas and Scenarios or Empathy Maps

The analysis that the team performs will provide new perspectives and understandings. Based on the field research experience, and a more outside-in perspective, revise and update preliminary personas, scenarios or empathy maps to more accurately reflect client or citizen needs, goals and activities. See the information on Preliminary [Personas and Scenarios](#) and [Preliminary Journey Mapping](#) under the section on Internal Discovery.



Journey Mapping Workshop

Once the larger team has completed the affinity analysis, the core team will be ready for a deep dive into the service journey. This is a good time to bring people together and build a shared understanding through this process

There may already be preliminary journey maps created from the internal discovery workshops. These preliminary journey maps are powerful tools for bringing together different parts of the organization and surfacing assumptions, but they only provide a preliminary understanding of the experience without real field data.

Once the core team has completed the fieldwork, they will be able to build on the preliminary journey maps with much greater confidence that the maps reflect actual client experience and needs.

The team can pull directly from the research observations and insights, and then they can see the contrast and

alignment with initial assumptions and ideas. The team can also consider projecting photos from the affinity analysis to bring these elements into the mapping process.

After the clusters are captured and documented, the core team should transfer relevant affinity stickies onto a journey map format.

These research-driven journey maps serve to visualize and communicate the research findings. They can be used, especially at the leadership level, to identify connections to the service journey as well as be used as a part of procurement and systems development.

Journey maps are a concise format that brings together different perspectives on the experience, and these perspectives help bring the organization together. Therefore, the team may find that additional understanding of the client experience may need to be expressed in more than one map—either for different stakeholders, or for greater levels of detail in the overall journey.

Visualizing the client journey also shows where pain points and opportunities lie. As initial client experience maps are put together, the team may find themselves logging many opportunities.

In the Opportunity Phase [LINK to section], the team will look at the maps for key defining moments, or moments of truth. The team will perform solo and group brainstorming for improving these crucial service interactions. They will also redesign the journey so that a future service experience is described, creating shared value for citizens or clients and for the ministry.

In some cases, as the team creates research-based maps, they may want to move directly into these [*opportunity-focused activities*](#).

Creating Alpha and Final Journey Maps

Once the journey map workshop is complete, the team will have a great foundation to create a final journey map. The team will capture and consolidate the content of the journey map workshop; first into an electronic version or an alpha journey map, then by adding more detail from the source material.

There may be additional details to add that may not have been readily available in the workshop, such as relevant measures or direct quotes from interviews. These additional streams add value to the first journey map by communicating more facets of the experience.

Utilizing multiple facets is important because of different learning styles and preferences. One person may prefer or relate better to narrative and quotes, while another prefers or relates more to numbers and measures. As people gravitate to their preferred details, they are also exposed to other elements creating a more rounded and complete understanding of the experience. It is recommended that the team use direct quotes from the research, as well as relevant measures. If available from the research, include an indicator of emotional state or stress level (this can be a running bar chart or plotted in one row of the map).

The adjacent details added to the journey map may spark new ideas as people see previously unrelated things side by side, and this will help frame conversations about improving the service experience. Understanding the whole experience, and the challenges in it, is a powerful motivator for people who want to make a difference.

Maps of the current state are useful in diagnosing challenges and pain points, highlighting moments of truth, and showing the full nature of the service experience. If there will be a time gap between the Discovery and Opportunity phases, the team may want to create a polished final version of the journey map in its current state. A polished version may help communicate the need for change; depending on how comfortable the ministry is in using less polished (but still rigorous) deliverables. However, if the team is close to mapping the future state in the

Journey Map Resources

- [RTB Experience Map Example](#)
- [MCFD Caring for a Child with Special Needs Experience Map Example](#)
- [MCFD Parent Searching for Child Care Journey Map Example](#)
- [AVED Journey Map](#)
- [DriveBC Journey Map](#)
- [Journey Map Template](#)
- [Service Design Methods & Tools on Journey Mapping](#)
- [Mapping Experiences](#)

Opportunity Phase, they may stop at this point without investing more time and effort in journey mapping the current state.

Use the accompanying [Journey Map template](#) to create a more polished version of the journey map. The template includes elements to combine the activities that people take, the various channels that they might use for those activities, and shows how those activities work over time in a way that is not simply linear (e.g. some activities are cyclical, others are nonlinear as people move from task to task). Showing this Action Path as part of the journey map can visually express more of the real-world complexity of the journey while still being simple enough to follow.

Metrics Design Workshop

The Metrics Design Workshop generates relevant metrics that reflect the client journey. Metrics must reflect the service experience and shared value for citizens or other stakeholders, as well as government. These metrics are often extensions and refinement of current performance measurements.

Effective metrics design workshops include policy analysts, frontline staff or others who are currently helping manage service performance. Involvement from frontline staff is important so that they can advise if suggested measures will create outcomes that may damage the service experience. For example, if call centre staff are measured on call time, they will be encouraged to cut calls short or even end calls before the client has been fully helped.

Set an expectation in the invitation to participants that this is an opportunity to help better integrate the service with the client experience, not a time to criticize or defend current performance management.

In the workshop itself:

1. Use the journey map(s) and work individually. Then as a group identify contributors or elements of the individual moments of truth throughout the journey. What measures or indicators are available to show how well the service performs in those deciding moments?
2. Sketch and refine a logic model for these indicators. What are the relationships between these measures? What is the connection between perception, description and outcomes?
3. Use sticky notes to post potential measures along the service journey by generating a broad perspective on how service could be measured. Avoid critiquing measures at this point.
4. Work to filter these measures for ones that make sense for the service. Prioritize measures by how strongly they affect the experience, how easy they are to measure, and how closely they can be connected to the service
5. Based on these measures, test a small set of metrics to quantify and determine the timeframe they should be quantified in. Depending on the availability of data and integration with analytics and reporting systems, some measures may be annual, weekly or even in real time.

Use these measures to establish initial service metrics. This should be a small, focused set of metrics and indicators that matter most for service experience quality. What is excluded is as important as what is included.

6. Assign responsibility and accountability for ongoing metrics measurement, reporting and management. In addition to scheduling the frequency of metrics measurement, ensure that measures are regularly reviewed to check that they still reflect shared value. Often measures will not change, but that should be a conscious decision rather than due to neglect.

Combine metrics that show the overall experience quality with metrics that show the operational steps or processes that support that experience.

Lean's [control planning approach](#) offers a good model for incorporating metrics into ongoing continuous improvement.

Reporting

While the team will gain insights from simply conducting research and analysis, reporting is where the work starts to make a difference for the rest of the organization. Research reporting summarizes and communicates the insights gained from the research aids in:

- ▶ Framing the specific challenges and opportunities discovered
- ▶ Creating a common point of view as the team moves forward
- ▶ Assisting the broader organization to understand and embrace needed change

Research reporting, already generated through analysis, should capture three key outputs:

- ▶ **Research Findings**
Overall themes, principles, insights and summary of research. Summarizes the clusters and insights from the analysis workshops. Identifies audiences, their goals, and common scenarios using updated and revised personas or empathy maps.
- ▶ **Journey Mapping**
Visualization of current client journeys adds depth to scenarios and provides a common artifact for showing pain points and discussing opportunities. The report revises preliminary journey maps, challenges assumptions, adds detail and captures key insights and principles. This is a key tool for the Opportunity Phase.
- ▶ **Service Metrics**
Sets out the model for evaluating a given service. Defines the measures for establishing service baseline. Commonly draws on both existing metrics and new measures identified during discovery. Used to establish initial service baseline measures for use in ongoing performance management and comparison for services after they have been developed or refined.

Capturing the Initial Service Baseline

Use the initial service metrics to measure current service performance. These initial measures establish an early baseline for the service before any new service innovations are introduced.

Ongoing Metrics for Continuous Improvement

Metrics can help teams understand how a service is working across the entire service architecture, from the client interface and experience to operations, policy and organizational structure.

Discovery Deliverables

Produce deliverables that will capture the breadth of the research and present a rich map illustrating the service experience. Discovery deliverables may include the following:

- ▶ [Business Model Canvas](#)
- ▶ [Journey Map\(s\)](#)
- ▶ [Opportunity Log](#)
- ▶ [Personas and Scenarios](#)
- ▶ [Service Metrics](#)

Discovery Results

This phase will create a shared understanding in the program area of the service ecosystem, mainly from the perspective of the people using it. This will help gain agreement on where the challenges in the service are, so that the team can move to the Opportunity Phase with a shared business understanding.

Duration and Effort

Four to six weeks

- ▶ **Week one:** planning and research logistics
- ▶ **Weeks two to four:** research activities
- ▶ **Week five to six:** finalize deliverables

Discovery Guidelines

The Playbook is a guide to service design in the BCPS, and during a project the core team may choose to tailor its approach to service design to meet project and client needs. The following are guidelines to keep in mind as the team proceeds through the Discovery Phase. These are the key success factors that should be addressed during this phase.

Recruiting. Recruiting. Recruiting.

Getting the right people to participate is critical to success. However, many teams underestimate the time and effort needed to recruit participants. This can delay a service design project by weeks. Start preparing for recruiting efforts from the very beginning of a project. Budget at least one full-time team member over two to three weeks to lead recruiting, whether they do it themselves or co-ordinate with a recruiting contractor.

Explore the Whole Experience

Client experiences happen before, during, and after their interactions with a service area. Understanding the whole experience will demonstrate better ways for the service area to improve their own part of it.

Get Out in the Field

To truly understand a service experience is to experience it first hand. Teams need to get out of the office and away from boardroom meetings in order to see how service works on the frontline and in people's lives.

Design With vs. Design For

Designing for people can return good results, but designing with people gets even better results. Involving people in co-design workshops as co-creators of ideas and solutions will provide better outcomes and better buy-in for service transformation.

Map Defining Moments

Capture the key moments of experience and map them over time. Show how the experience works visually, especially at the defining moments that make or break a successful service.

Reframe to Win

Often, the best way to come up with a winning solution is to see the problem or opportunity differently. Reframing or redefining the situation unlocks new opportunities. Often this will mean operating at a different level than the one where the initial problem was identified.

Measure What Matters

What gets measured gets managed, but make sure that what is being measured is what matters to people. Ensure that measures reflect needs and success in the service experience, not just the convenience of what can be easily measured. Defining moments are a key area to look for metrics that matter.

Opportunity Logging

Opportunities will come up throughout the entire design process. Capture these suggestions in a log rather than restricting conversations about the opportunities only to the Opportunity Phase of the process.

A simple Excel spreadsheet is a good logging tool. Capture the opportunity with a brief word or phrase, a longer note to explain context, the date and who captured the opportunity to allow for follow-up. Opportunities may be captured in real time during a workshop or may be captured as part of the daily debriefing.

What is Service Blueprinting?

Service blueprints are visual documents that show the overall journey of a person experiencing a service. Layers of information are then added which detail what the organization must do to support that service experience.

Service blueprinting and the service blueprinting workshops are detailed in the section [The Early Blueprint Workshop](#).

Templates

- ▶ [Business Model Canvas](#): One page model of key business drivers for service.
- ▶ [Journey Map](#): Visual map of service experience over time.
- ▶ [Opportunity Log](#): Spreadsheet to track opportunities.
- ▶ [Feature-Value Matrix](#): Spreadsheet to help rank opportunities by business and user value.
- ▶ [Service Blueprint](#): Visual map of service experience extended with organizational elements.

Examples

- ▶ [ODR Service Blueprint](#)
- ▶ [Future Journey Map](#)

Further Reading

- ▶ [This is Service Design Thinking](#)
- ▶ [Service Design Methods & Tools: Strategy](#)

OPPORTUNITY PHASE

The Opportunity Phase explores future options for the service environment based on the insights the core team gained during discovery work. The team will naturally shift from documenting the current state of the service to exploring potential service futures as they complete the analysis of the research and mapping of the service(s).

The clients and the core team will have ideas and make suggestions throughout a service design project, which the core team will be identifying and capturing during the discovery work.

Now that the initial research is complete, the core team and other stakeholders can start to generate new ideas and options based on these early ideas and the research insights. The core team should use their understanding of business goals, client needs, and the overall service ecosystem to prioritize the most promising opportunities for prototyping and initial service blueprinting.

Opportunity Activities

Opportunity activities are about capturing and creating new opportunities for service improvement, from incremental changes to new service offerings and even fundamental service transformation. Service design also shows opportunities for scaling back or stopping existing efforts that are not as useful for citizens and other stakeholders.

The key work of this phase is exploring options to improve the service area. Key methods include solo brainstorming, co-design, and iterating maps and models of the current state to reflect possible futures. Specific options will also need to be logged, selected and prioritized. Initial service blueprinting will be carried out to understand the organizational and policy implications of the most promising opportunities.

Opportunities are focused on the future: “What could we do to improve how the BCPS provides services to citizens and other stakeholders?”

The Opportunity Phase involves five main activities:

1. **Research Briefing**
Surface opportunities already identified in earlier discovery work.
2. **Presentation of Current Service Model or Map**
Review the discovery work to build empathy and frame (or reframe) the problems, challenges, and broad opportunities based on insights from the analysis.
3. **Opportunity Generation and Capture**
Capture new opportunities through solo brainstorming paired with group workshops.
4. **Opportunity Selection and Prioritization**
Select and prioritize the most promising opportunities.
5. **Initial Blueprint Workshop and Future Service Model or Map Development**
Begin service blueprinting to identify the implementation needs and implications.

Opportunity and Discovery

During the Discovery Phase, the core team will start to identify and capture opportunities. As the team conducts fieldwork and co-design, they will begin to see certain things differently about the services. This new perspective can help redefine or reframe the challenges facing the organization so that even better solutions can be created than were first intended.

As outlined in the Discovery Phase, the team will use an opportunity log so ideas are remembered. It will make the work during the Opportunity Phase that much easier and more straightforward.

Some opportunity activities will raise questions and reveal areas that require more understanding and investigation. At this point, the team may shift back into the discovery phase to get the answers needed. However, it is important to keep moving forward; therefore, the team should use their best experience, analysis, and judgement when these questions arise.

Opportunity and Prototyping

The Opportunity Phase works hand-in-hand with the Prototyping Phase to test opportunities and see how they work in the real world. If opportunity is about generating new ideas, prototyping is about making new ideas. Some people on the team are going to be more comfortable generating new ideas with thinking, while others are more comfortable with making. The best teams bring thinkers and doers together to identify and test new opportunities.

Prototyping works with the opportunity phase to:

- ▶ Validate, test the concept and design of a specific feature, function or service. Prototyping brings opportunities into the real world.
- ▶ Reduce risks by trying opportunities in a safe, limited scope.
- ▶ Create new insights and reveal better opportunities that did not surface during previous discovery or opportunity work.
- ▶ Flesh out details of opportunities to create better service blueprints documenting the elements needed to implement service improvement.

Generating Opportunities Using Better Brainstorming

This phase is about generating many opportunities and then focusing in on the best ones. The core team will already have some opportunities from the process; now is the time to come up with new ones.

Contrary to popular practice, brainstorming is most productive as a solo activity prior to jumping into a group setting.

Opportunities come from insights. Insights come from analysis and intersections. The best place for people to start is right in their own head then every team member is better prepared to contribute during group work.

Better Brainstorming

Example: BC Services Card

The BC Services Card team used this opportunity approach to explore different opportunities for how the card could benefit British Columbians. Over three days, teams generated dozens of ideas using a combination of solo work, visual thinking and service prototyping. Then they generated journey maps to tell the stories of key opportunities for the card. These maps were used as part of the public consultation about the future of digital services in BC.

More can be read about the [Digital Services Consultation here](#).



Preparing for Opportunity Workshops

During the Opportunity Phase, the core team will go through different activities in a workshop format. Prepare for these workshops by:

Choosing Workshop Participants

Think about who else beyond the core team should be invited. This is a prime opportunity to invite participation from relevant business areas. Consider including frontline staff representatives as well as service management or policy designers. Be cautious inviting senior executives who may unintentionally dominate the activities and conversation.

Workshop Logistics and Scheduling

Schedule workshops well in advance. A typical workshop schedule takes place over four sessions spread across a three to four day period. However, depending on the amount of early ideas and research insights the team needs to get through from the Discovery Phase, the workshops could be shorter or in some cases spread out for up to two workweeks. See The Opportunity Workshop Series section for full workshop description.

Opportunity Log

If the opportunity log is fairly short and self-explanatory, the team may want to distribute it before any meetings. If it is more abbreviated shorthand or if it is lengthy, it should be summarized first or included as part of the initial research briefing.

The Opportunity Workshop Series

The core team will work with a wider group of stakeholders to explore and generate opportunities, then prioritize and focus on the most promising ones with storyboards, blueprints and prototypes. This will take some commitment and dedicated time. Expect three or four days of effort over one or two weeks for the extended working group. Activities that happen during the opportunity workshops include:

- Review research and frame the challenge
- Generate new opportunities (individually, then as a group)
- Focus and prioritize
- Add detail through maps, stories and sharing

Session 1: Review Research and Frame Challenge

Opportunity builds on a foundation of discovery. Start the Opportunity Phase by briefing all the participants on the work to date. Briefing sessions typically run one and a half to two hours.

Summarize the team's insights from the Discovery Phase. This will help create a shared understanding of the work and build empathy amongst the people involved. Share the research findings, audience identification and needs, as well as other insights and patterns. Share any personas, empathy maps, journey maps, business model canvases or other artifacts.

Use these insights to help focus the group on a specific range of opportunities by posing a challenge statement, such as "How can we help reduce the need for arbitration services for British Columbians?" Refine the challenge statement together so that it is clear what the group is going to focus on, without suggesting a solution.

Close the session by inviting participants to spend some time on their own thinking about new ideas to address the challenge.

Writing a Great Challenge Statement

Challenge statements ask the group how they will achieve a particular vision or outcome. The key to a great challenge statement is that it does not presume a particular solution but at the same time outlines the outcomes, vision and potential for service improvement. It also leaves enough leeway to generate many options, rather than being so specific that only a narrow range of ideas applies.

For example, after the initial discovery work, "How can we improve our case management system?" might be rewritten to "How can we help applicants navigate the intake process?" Several challenge statements may be needed to show the different facets of service improvement. Also consider, "How can we help our clients feel confident and be informed throughout the process?"; however, it is too narrow to ask, "How can we notify applicants of the current status of their application?"

Session 2: New Opportunities

The second day is often full of energy as people are able to share their ideas with each other. It typically takes six to eight hours to run a session generating new opportunities. A sample workshop is outlined below.

Although these workshops may be designed differently from project to project, the workshop still needs to be grounded in the research, and the core team will get better ideas if people start generating ideas on their own before shifting to group work.

Sample Workshop Outline:

- ▶ Recap the previous briefing.
- ▶ Use the challenge statement and invite participants to list ideas on how they can meet the challenge on their own. They may already have started before the session. This individual work will typically take 15-45 minutes, depending on how prepared participants are. Encourage volume and speed before editing ideas for quality.

Consider using simple visual thinking to help express ideas. Having participants sketch their ideas taps into new ways of thinking as opposed to purely written work or verbal discussion.

Incubate to Innovate

People produce better ideas when they have some time to absorb the discovery findings.

Better results will be received by giving people some time to think things over, after sharing the findings and before jumping into brainstorming activities.

- ▶ Pair participants to share ideas with each other. Sharing ideas will spark new ideas and combinations of ideas; have the pairs capture any new opportunities. As they share their ideas they will also need to start to explain them further. A quick visual sketch, and a couple more sentences, can add to the shorthand of individual work.
- ▶ Bring the pairs into groups. Capture every idea into a group opportunity log that will later be merged with the overall opportunity tracking (this may be on flipcharts or in an electronic document). Continue to capture new opportunities and add detail as ideas are explained. Depending on the group, it may be helpful to have a facilitator at each table. Some groups will be fine independently; other teams will need more guidance.
- ▶ Groups will often start to run short of energy as ideas are shared. Consider using co-design tools to shift the energy in the session and help participants add details to their ideas. Using sketching, storyboards, business origami, role-playing or other co-design tools can help the group explore and build on their ideas. The most productive group dynamics shift between making, reflection and storytelling. Co-design tools will provide the most value when someone can help facilitate using them with the group. Members of the core team may take on this role (though unlike traditional facilitation, the core team members should still contribute ideas).
- ▶ If time remains in the day, have groups share an overview of their ideas. Capture the ideas from the day and merge them into the overall opportunity log. Each opportunity needs a short title, description and reference number. Other notes may be added (such as date or contributor). Real time collaboration tools can be helpful here.

Session 3: Focusing and Prioritizing

This workshop shifts from generating ideas to narrowing them down. The following describes a simple group workshop approach to Focusing. The core team may also use a Feature-Value Matrix as a more granular analysis approach. A Feature-Value Matrix considers the value for different stakeholders for each opportunity. This value can then be compared with effort, complexity and risk of action (and inaction). Consider inviting decision makers to help with Shared Value and Impact Analysis conversations.

- ▶ Preparation: Consider printing the opportunity titles on sticky notes.
- ▶ Explain that the workshop is about narrowing and prioritizing the opportunities they have generated. This typically includes Concept Clustering, Shared Value Analysis and Impact Analysis.
- ▶ Start by clustering opportunities as a group. Have everyone work in parallel, similar to the affinity analysis from discovery work. Create groups of related opportunities and merge identical ones into one sticky note. Have people describe the clusters they are creating or to find matches to opportunities that they have. Label the clusters with overall titles. Take photos of the groupings for later reference. A new section in the opportunity log can be created to track these refined ideas.
- ▶ Discuss Shared Value. To look at Shared Value, work through the clusters placing them on a large 2x2 matrix of high or low value for the citizen or stakeholder and high or low value for government. What are the opportunities that the group sees as high value for both?
- ▶ Discuss Impact. Finally, take the highest value opportunities and create another 2x2 grid, looking at high/low impact and high/low effort to implement. What are the ideas that are high impact and low effort? What are the risks of both acting and not acting on a specific opportunity? Are there other ideas that may be worth high effort because they will have high impact?
- ▶ Discuss which options resonate with the group and the core team. Keep in mind the outcomes that the team is working towards. Use the challenge statement developed earlier to focus the vision of the team. Select the most promising opportunities for further exploration through mapping, blueprinting and prototyping.

- ▶ The team may need to pause at this point to get direction from the working group or executive if they have not been involved in the workshops.

Session 4: Mapping, Storytelling and Sharing

This session is about adding detail to the selected opportunities and preparing the core team for blueprinting and prototyping. It often takes place over three or four hours.

- ▶ Form into groups and assign one or more opportunities to each group.
- ▶ Have groups build out detail about the opportunity by storyboarding and talking about what will happen.
- ▶ Capture a high-level journey map for each opportunity, including the major steps and activities. This will fuel the service blueprinting for these opportunities.
- ▶ Share the story of each opportunity and identify possibilities for prototyping or further exploration.

If the intent is to share the future journey maps beyond the group, they may need to be polished and refined before sharing.

Opportunity Selection, Risk Management and Priority

For selecting and prioritizing opportunities, consider running smaller sessions with less people. It is recommended to include only the core team as they were directly involved in the discovery research.

As the team develops the candidate opportunities, identify the risks of both action and inaction. A simple risk assessment may begin with adding high/medium/low risk based on team consensus. More sophisticated risk-management approaches are well developed in the BCPS. Lean and Enterprise Business Architecture both offer approaches as a more granular approach to risk management.

Finally, to assist with validation and managing change, the core team will present a focused set of opportunities for input without taking up time with a large-scale prioritization exercise. They will present to the program area ADM and other project sponsors, the project working group and the Steering Committee.

A weighted Feature-Value Matrix or other prioritization tool can be helpful as executive decision makers are briefed.

Future Business Model Canvas

What does the Business Model Canvas look like for new service offerings? At this point, the core team may want to get a quick snapshot of the future organizational implications for different opportunities. The core team may have created a *Business Model Canvas* in the *Alignment Phase* that focuses on the current state. Updating the canvas with the core team or the larger working group will help the team understand the kinds of future organizational changes that will need to be made to create new value.

The Early Blueprint Workshop

Developing a blueprint for the project will depend on what was uncovered in the research evidence and key findings. Not all projects will require a Service Blueprint as a deliverable. However, if it is deemed a requirement, the core team will transition from ideas created in the Opportunity Phase to execution using the blueprint. These large visual documents show the overall journey. Layers of information are then added which detail what the organization must do to support that service experience. Policy is particularly important to coordinate within government. This early blueprint workshop is a great opportunity to invite policy analysts and owners to contribute.

There will likely be gaps at this point as the team works to fill out the blueprint. These gaps point to areas that can be further explored through the prototyping phase or through the team returning briefly to the Discovery Phase.

Extend the journey maps with organizational layers including:

Channels

How is the service going to be delivered? Are there implications for face-to-face, mobile, web, forms, or call centre?

Organizational Capabilities

What capabilities are needed to deliver the service? Which ones already exist and which are new? Are there capabilities in other parts of government that could be adopted?

Staffing and Organizational Structure

Who is involved in delivering the service? What structure, culture and values are needed to consistently deliver effective service?

Business Process

What processes and procedures are changed? Have they been reviewed from a Lean perspective to ensure they will deliver the most value? If not, contact your [Ministry Lean Lead](#) or [LeanBC](#) for information and support.

Physical Environment

What are the needs for facilities to deliver the service? Are there changes in locations? Layout? Equipment?

Policy and Strategy

What are the policy implications and needs for service delivery? Are there current policies that limit how a service is implemented? Are there policies that need to be updated to reflect the direction of the organization and the needs of stakeholders? Do new policies need to be designed?

Technical Systems

What technical infrastructure and systems support are needed to deliver the service? Are there alternatives to new technical investment? Are there existing capabilities elsewhere in government?

As the core team outlines the initial blueprint, it might be useful to explore what would change in the Business Model Canvas, if the team completed one in the Alignment Phase.

Use the early blueprint as a framework to identify key elements to explore during the Prototyping Phase as well as areas where more discovery work is needed for prototyping. Continue to fill in details in the blueprint as more information is collected and the team gains further insights into how the service will actually work.

Opportunity Deliverables

The team needs to produce deliverables that will capture the range of opportunities, how opportunities fit into the overall service journey, the priority of those opportunities, and an initial service blueprint (if required) that extends the mapping into organizational and policy considerations. The following items may become deliverables for the Opportunity Phase.

Expanded Opportunity Log

The opportunity log should contain a long list of raw opportunities, as well as a clustered and prioritized view of the opportunities. This log will be used to determine which prototypes to develop, as well as help to build out the final roadmap.

Feature Value Matrix

A formal Feature Value Matrix spreadsheet showing quadrants may have been created through a group prioritization exercise. This will provide a sense of which features or aspects of a service will be most valuable.

Future State Business Model Canvas

The Business Model Canvas may have been updated to reflect new service offerings.

Future State Journey Map(s)

As part of the opportunity workshops, participants may have created high-level journey maps or storyboards.

Initial Service Blueprints

At this point, the core team may have an early service blueprint that shows what elements the organization needs in order to deliver a specific service. Even if it has gaps, this initial blueprint will serve as a framework to guide future conversations and prototyping.

Opportunity Results

“The best way to have a good idea is to have a lot of ideas.” – Linus Pauling

The challenge of all new investment is that there are more ideas than resources. So how do ministries know what to invest in? The way some companies manage this is to hire a genius, like the duet of Steve Jobs and Jony Ive at Apple. But many other organizations innovate without a genius at the helm. They navigate this challenge by generating lots of ideas, then evaluate and filter those ideas to come up with a short list of things that will make the biggest difference and are most promising for further investment.

The Opportunity Phase helps the core team consider a lot of ideas and generate a clear set of opportunities that will create shared value for clients, other stakeholders, and for government.

This generative approach, where the focus is on exploring and expanding ideas, helps break the status quo and find real opportunity for service transformation. Rather than investing in incremental improvements, there will be more options that can make a significant impact and provide a better return on investment.

In this phase, the team will select and prioritize the best opportunities to explore further. These selected opportunities provide the focal point for the next phase: Prototype—test ideas with concrete, tangible demonstrations of future services.

While prototyping is a distinct phase in the process, it is not a stand-alone activity. Teams need to keep in mind while selecting opportunities that this is not the only chance to prototype. More time later in the process, or even after the project is complete, could be available to test other key opportunities that were not able to be prototyped during the Opportunity or Prototype Phase.

By next creating a blueprint, the team can see what the organization needs to do in order to deliver a service and focus the conversation from discovery and exploration to execution.

The Opportunity Phase sets the stage for the [Prototyping Phase](#), where the team gets the chance to make the best ideas concrete and test them out in the real world.

Duration and Effort

One to three weeks + Prototyping

- ▶ **week one:** opportunity generation & prioritization
- ▶ **week two:** service blueprinting
- ▶ **week three:** updates based on prototyping and testing

Opportunity Guidelines

The Playbook is a guide to service design in the BCPS and the core team may choose to tailor its approach to service design along the way. The following are guidelines to keep in mind as the team proceeds through the Opportunity Phase. They are the key success factors that should be addressed during this phase.

Lead With Needs: Connect Needs to Capabilities

Start brainstorming by focusing on the needs of citizens and other stakeholders (rather than starting off thinking about technologies or other implementation). Review the discovery findings to set the stage for opportunity thinking. Start by indicating which citizen needs are clear. Use those needs to fuel ideas for service innovation. Ideas will include new or modified capabilities for government—things that government does to provide a service. Make it clear what citizen needs are supported by the future capabilities the team imagined during the brainstorming and opportunity sessions.

Go Wide, Then Narrow

Start by generating many ideas before narrowing focus to the best ones. It is easy to focus on the first good idea; however, this is a mistake as other good ideas may get missed.

Start Solo, Then Merge

Participants will generate more ideas, and better ones, if they start by brainstorming on their own. Begin idea generation by briefing people on the research, then letting them create ideas on their own before merging all ideas with the group. This often works best on day one of a workshop that shares initial findings and frames the focus of the session, then starts again the next day after people have had the chance to sleep on these ideas.

Effectiveness Before Efficiency

Choosing the right things to do comes before making those things run smoothly. Focusing on doing the wrong things more efficiently will not make them right. For example, a recipe for a dinner party would not be chosen before knowing how many dinner guests are attending and what preferences or needs the guests may have.

Create Shared Value

Effective government creates value for citizens, stakeholders and for government itself. This shared value creation is at the heart of service design. The team needs to understand user needs before they will know where to look for shared value opportunities.

Address Entire Service Architecture

When generating ideas, remember to look across the entire service architecture. The best ideas might reflect something from client interface, operations, infrastructure, policy, strategy, staffing, incentives or legislation. Also consider this range while prioritizing ideas and think about what the ripple effects are across the organization's service architecture.

Technology Is Not an Answer by Itself

There is a tendency to think that technology is a solution. Technology for technology's sake is a risky opportunity. Instead, ensure that technology ideas provide capabilities that are firmly grounded in evidence of client needs.

PROTOTYPE PHASE

The Prototype Phase is about trying new ideas with real people before fully implementing those ideas. The biggest role prototyping plays for the BCPS is risk mitigation.

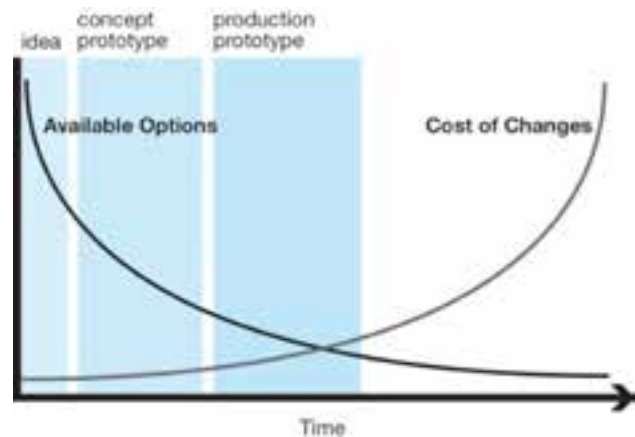
As described in the Opportunity Phase, prototyping works hand-in-hand with opportunity development. As the core team works to develop new ideas and opportunities for better service delivery, they can start prototyping those ideas to see how they work in the real world, and iterate on those ideas as the team continues with the service design project.

Prototype Development and Risk Reduction

Prototyping reduces risk for service innovation and transformation. One of the biggest benefits of prototyping is that it helps avoid costly changes once a service is in production.

The cost differential for making a change in an early concept stage versus later in actual production is significant. The cost differential for making a change once a service is in production is even more significant.

Service design provides for necessary research with the people that will be using the service. It allows for testing and iterating on potential service design changes, helping mitigate potentially costly mistakes or oversights.



Large and complex organizations like the BCPS have some particular risks that prototyping helps manage:

Generate Better Opportunities

Prototyping will trigger new or improved insights about better opportunities because seeing something in action helps gain insight into how it can work even better. Compared to discussions around a meeting room table, prototypes immerse the core team and stakeholders in the opportunity. This gives a new, invaluable perspective to create a better service.

By prototyping opportunities, the core team can see them from different angles and can generate better opportunities than through discovery alone. Tangible models literally activate different areas of the brain. This taps into a richer source of opportunity thinking, which in turn lowers the risk of investing in opportunities that will produce fewer benefits for the ministry.

Another way of thinking about this is that prototypes manage the risk of opportunity cost. The cost of investing in one opportunity makes it difficult to invest those same resources in another opportunity. By allowing the team and stakeholders to see ideas in action, prototyping helps decision-makers feel more confident that they have selected the right direction for the service.

Create Common Ground

Projects are constantly at risk of miscommunication, misunderstanding, and conflicting expectations between stakeholders. Prototypes create bridges between people and between different organizations— something that is critical on multi-ministry projects or services that are delivered with partners outside the BCPS. A concrete model of the opportunity provides a way for people with different perspectives to come together and develop shared understanding.

Because people can see and feel the prototype, individual visions and viewpoints merge into a greater shared goal. This common ground reduces risks of miscommunication, missed requirements and inaccurate expectations. Prototypes provide clarity and unity.

Connect Executives and the Frontline (And Regions and Central Offices)

A special case of creating common ground is the connection that prototypes make between executives and the frontline. Leadership's vision and daily service delivery are both reflected and understood in a prototype. A prototype encourages important conversations for executives to understand the nuances and realities of frontline work, at the same time it shares the broader vision for service transformation with teams in the trenches. Prototypes create commitment and understanding.

Prove the Concept

Sometimes what sounds good in theory (or policy) does not work so well in practice.

Instead of waiting until the service is almost ready for launch to begin testing, trying out prototypes in the real world sooner reduces the risk of investing in a flawed concept.

Improve Implementation

Even with great concepts, poor implementation can still derail a project. Prototypes let the development team be involved early on in the prototyping process to understand the implementation needs. Prototyping lets the core team make course corrections—testing a prototype will demonstrate how to refine it to make an even better service.

Prototypes can also express the overall vision, helping the development team make decisions that reflect that vision, and help translate business specifications and requirements. Finally, prototyping helps anticipate challenges or find alternatives to technically challenging implementations.

Decide with Data

By creating a concrete model and testing it with real people, the team will get better data to make design decisions. Rather than making decisions about service implementation based on personal preference, the team will have a better sense of what works and what does not. Professional judgment and experience will still need to be used to interpret and apply that data. Data will help the team be more confident in their decisions.

Teams need to be sensitive in how data is used to support decisions. While some findings will be fairly conclusive, others will only point to possibilities. Use data to foster conversations—that is what shifts findings from data to information that can be used to innovate.

Identify Gaps and Other Efforts Needed for Implementation

Data helps identify gaps in the solution. It also helps identify other areas needed for successful implementation, such as Lean, Enterprise Business Architecture, software development, policy or legislative harmonization.

Trying Out Ideas in the Real World

Nothing improves the odds of getting a service right than making it tangible early in the design process. Prototyping is the practice of making ideas concrete so they can be understood, tested, refined and improved.

The core team will use prototyping to bring ideas to life, from simple sketches and storyboards to fully interactive kiosks, voice response systems or even new physical space layouts.

A prototype is different than a beta. A beta is a production service that is almost ready for release, used by a large group of participants to find mistakes and fix them before wide release. In contrast, a prototype should start very early and very rough, then be refined as the team learns what does and does not work.

Prototypes can also be incomplete. Sometimes the core team only needs to prototype part of a service rather than the whole thing. In choosing what parts of a service to prototype, the team may want to create a vertical prototype (one that explores a specific interaction or scenario in depth) or a horizontal prototype (one that represents a broad cross section of the service but without much detail).

Prototyping Manages Innovation Risk

Prototyping is critical for service transformation and innovation. Innovation by definition is unproven and that makes it risky. Prototypes give a low-cost, low-risk method for proving that new service innovations work in the real world and increase public value. This gives the core team the freedom to innovate with a safety net.

While prototyping is a distinct phase in the process, it is not a stand-alone activity that only occurs after the discovery and opportunity phases are complete. The teams with the most success use prototyping throughout the entire service design experience.

Additional Reading

- [*Prototyping, Zaki-Warfel*](#)
- [*Paper Prototyping, Snyder*](#)
- [*Sketching User Experience, Buxton*](#)
- [*Don't Make Me Think, Krug*](#)

Prototyping During Discovery and Opportunity Phases

The core team will likely use some early prototypes in the Discovery Phase as part of co-design sessions and to assist with explaining ideas to people. The team will find an even closer relationship between opportunity and prototyping, as some opportunities will only start to be clear once they become concrete.

Prototyping will be used in tandem with the Opportunity Phase to explore how specific opportunities will work with citizens, clients, partners and staff. Prototypes allow the team to safely try out ideas in the real world, and because they are limited in scope, prototypes hold far less risk than waiting until ideas are fully implemented.

Prototyping lets thinkers and makers collaborate to design and improve services. Some people find that they are more comfortable working hands-on and will use prototypes to explore and generate opportunities throughout the process. The core team will move back and forth between generating opportunities and prototyping to try things out, which in turn will create new insights and even more new opportunities.

Choose the Right Kind of Prototype

Kinds of Prototypes

Three factors determine the kind of prototype required at this point in the process:

- ▶ The purpose of the prototype
- ▶ The realism of the prototyped
- ▶ The medium of the prototype.

The Purpose of the Prototype

There are three main purposes for using Prototypes in the service design process, depending on how far along the project is:

1. Co-design Prototypes

Prototypes that are created in a workshop or group setting to help people articulate their needs and wants. Generally low realism, using paper, sketching, role-play, cardboard, etc.

2. Concept Prototypes

Prototypes that help explain and clarify the core idea at the heart of an opportunity. May be low-fidelity (like a storyboard or sketches) or higher fidelity (like a series of mock-ups or a video showing future use).

3. Production Prototypes

Prototypes to explore how an idea will work in detail. Informs implementation. Allows for extensive testing or possible use in a pilot project setting.

The Fidelity of the Prototype

Prototypes also vary in realism: some may be quick sketches, while others may be like the concept cars shown in Detroit: a custom-built model that is the last step before being refined for production. Another term for the realism of a prototype is fidelity. A low-fidelity prototype is quick and dirty; a high-fidelity prototype is very realistic. In fact, some people may think that the new service is completely finished (even if there is still a large amount of work to make it fully functional).

The Medium of the Prototype

How will the prototype be physically represented? The medium matters—will it be a sketch or a foam core model? Different materials, from paper to digital to plastic, will get different responses to your prototype.

Choose a Prototyping Method/Medium such as:

- ▶ Paper (Sketch, Storyboard, Comic)
- ▶ Screen (PowerPoint, Comic Life, Axure, Excel, HTML, Floorplan software)

Prototype Example: Prototyping online dispute resolution

With a mandate to deliver an alternative forum to resolve small claims and strata property disputes, the Civil Resolution Tribunal (CRT), and Tribunal Transformation Initiative (TTI), used prototyping to inform its design of a new online dispute resolution platform and the service delivery process for the new CRT. This work has also created a reference model for other administrative justice bodies.

To test the concept of a question-and-answer expert system for the online platform, the team created a quick, clickable prototype modeled after current design ideas and took it out to citizens. Test driving the tool, and discussing the problems citizens encounter in their own context, helped validate the question-and-answer concept as an attractive and potentially effective way to triage citizen disputes. It also facilitated an understanding of citizen's options for resolution and helped to reveal features users would expect to find.

A second prototype focused on content delivery. This prototype was filled with content, and citizens were turned loose to triage their real life disputes. This activity showed what caused users to get stuck, what confused them, what content needed to be simplified or enhanced, and what users were seeking from the system.

A third prototype simulated the online application, negotiation, and facilitation processes of the future CRT. Citizens were given detailed scenarios and evidence to role-play opposing parties in a dispute. Using simple online forms and email, they worked through the Tribunal's online process as it might function in the future. This exercise revealed what users needed and what they wanted to know at critical moments in order to have confidence in the process. It also gave an indication of the kinds of tricky problems that Tribunal staff may encounter in helping disputants resolve their cases.

By revealing more insight into the things users will need in order to have a successful service experience, each experiment gave the TTI and the CRT more confidence to make design decisions before finalizing service process, technology and content.

- Desktop Walkthrough
 - *Business Origami*
 - *Lego / Playmobil*
- Physical Mock-up
 - *Role-play and improv*
 - *Cardboard / Foam core*
 - *Poster / brochure / form*
- Telephony
 - *IVR, Call Centre – Faking interaction/ automation (Wizard of Oz Concept)*
 - *IVR, Call Centre – Voice Over IP (VOIP) Prototype*
- Concept Video / Storyboard Animation
- Infographic

The book [*Prototyping*](#) by Todd Zaki Warfel provides more information about choosing prototyping methods and mediums.

Prototyping Workshops

Build buy-in and momentum by including people in early stages of the prototyping effort. This is a prime opportunity to co-design with internal or external stakeholders. The service innovation is ready for concrete realization and will release a lot of energy that was held back during earlier Discovery and Opportunity work.

- Create prototype of service touchpoints based on identified opportunities.
- 10/3/1 (Generating many solutions; refining down to just one to test):

Creating many prototypes ensures that teams do not get stuck on the first good idea that comes along. A good rule of thumb is to have 10 distinct directions, then refine and combine the best options into three clear alternatives before finally deciding on one.



Example of Tabletop Prototyping with Service BC Staff

Co-design workshops were conducted by the Service Design and Transformation Branch (SDTB) team with Service BC front-line staff and management to look at the integration of multi-channel services in the ServiceBC offices, as well as to understand how service delivery could be done at new and existing locations. Service BC staff worked together to re-imagine how their offices could better deliver service, with a focus on channels other than face-to-face (e.g. phone, online, kiosks, etc.). The SDTB team used tabletop prototypes to quickly explore alternatives and make suggestions.

The tabletop prototyping activities included:

- Brainstorming and sketching the floor plan using flip chart paper, sticky notes and pens.
- Business origami (a technique put to canvas using paper cut-outs of people, buildings, vehicles, computers and other technology) to create a miniature model of a system and the interactions in question.

Workshop plan

The SDTB team facilitated tabletop prototyping workshops after spending a day doing research at Service BC locations. The research included observation of service interactions throughout the offices, interviews with front-line staff, and public intercepts. The research informed the current design and model of service delivery in each office.

Create current service delivery model

The SDTB team created the current service delivery model by:

- ▶ Sketching the floor plan using flip chart paper and sticky notes to highlight elements of the service experience (e.g. waiting area, line up, entrance/exit, etc.)
- ▶ Using business origami to model the floor plan and the different elements of the service experience.

Present current service delivery model

The SDTB team presented the current service delivery model to the Service BC staff by:

- ▶ Walking through the current service experience.
- ▶ Going through the different areas.
- ▶ Looking at any areas that were interesting or different from other service models, at other locations or even in other contexts.

Create prototypes of the ideal service experience

By using the methods above, the SDTB team had staff participants work in small groups (4-6) to develop an improved service delivery model. Although the models were focused on the current office space, Service BC staff were encouraged to be creative and innovative in how they improve the service experience.

Staff presentations of the prototypes

The Service BC staff workshop participants presented tabletop prototypes by walking through the ideal vision for the service experience in their office.

Workshop Findings

The following key themes were common across the different Service BC office locations where workshops were held.

- ▶ Make self-serve stations central, preferably with new central workstations or kiosks.
- ▶ Convert counter wickets to stand-up assisted self-service stations where resources are not available for new workstations. Turn monitor and keyboard to face the client at the counter.
- ▶ Provide support for self-serve clients with staff on the floor.



- *“Roamers” or “greeters” can help with wayfinding and assessing readiness to complete service transactions.*
- *Roamers could have iPads or tablets to partially or fully complete service transactions while citizens are waiting in line.*
- Triage early at reception.
 - *Setting expectations for wait times.*
- Offer basic queue management.
 - *Prince George currently uses a two-tiered system where citizens enter either a ‘quick’ line for simple transactions or a ‘complex’ line for more complicated transactions. This model has shown a large improvement in the overall wait times and there are some additional opportunities for refining that model even more.*
- Ensure privacy for self-serve and counter clients.
 - *Adding dividers between the wickets would help with providing some additional privacy.*
- Ensure safety and security for staff and clients.
- Provide clear wayfinding within the offices.
 - *One main entrance and exit would be best for offices that currently have multiple entrance/exit options.*
 - *Signage to direct people to the reception/triage desk, and then into the proper queues.*
- Improve the CATs (Community Access Terminals)
 - *“Call them what they are, self serve...”*
 - *Touchscreen, voice-activated features, and multilingual options.*

Prototype Development and Refinement

The output from prototyping workshops often needs more development and refinement. Smaller, more focused teams, made up of members from the core team, will be most effective at taking the workshop prototypes and getting them to a state where the core team can then support the kinds of testing required.

Prototyping Test Activities

Understand the Context for Prototyping

The following questions will help the core team to understand the context for prototyping and testing it.

- What is needed from the prototype?
- What is needed in order to do the best prototyping?
- Is it being shared internally to build commitment and understanding?
- Is the team demonstrating a concept to see how it resonates with citizens, clients, or the frontline team?
- Is the team iterating and refining production details?

The [Service Architecture](#) elements will help with examining the various areas that should be considered in understanding the prototyping context. Two areas in particular are policy and operations.

Prototyping and Policy

It is important to consider the policy limits and implications of the prototype. Work with the relevant policy teams to be clear about what is planned. See how it fits in current policy and what policy shifts may be needed to actually implement the prototype. Depending on the sensitivity of the services involved, the core team may also need approvals for a policy exemption to test the prototype with the public or other stakeholders.

Prototyping and Operations

What are the operational limits and implications of the prototype? How will it fit in the current process? What processes will shift? What infrastructure and production needs are there for both the prototype itself and the future services that are being designed? Collaborating with the operational teams (both for frontline delivery process and for infrastructure) will help create a smooth transition from prototyping to actual implementation.

Team members will need to stand firm on key service improvements while at the same time remaining sensitive to concerns from those working in operations. If teams are not prepared for some resistance, this can weaken the value of the service transformation efforts.

Example: CFPB & Prototyping a Form

The legislation that created the United States' Consumer Finance Protection Bureau (CFPB) required CFPB to redesign two of the key forms used to gain a mortgage at American banks. Rather than redesigning the forms behind closed doors, CFPB tested variations of the forms in cities across the United States and on the CFPB website.

By testing concepts and iterating quickly, the CFPB design team was able to understand the needs of the public and ensure that the final form would help people make better financial decisions. [The forms launched in November 2013.](#)

Prototyping Test Logistics

Several questions will need to be answered as teams coordinate testing logistics.

▶ Articulate the Concept

What is the core idea for the prototype?

▶ Select Touchpoints and Interactions

What sort of behaviours does the prototype need to support? What kinds of interactions should it include?

▶ Comparative Evaluation

What other services provide similar functionality in other ministries, jurisdictions, or industry? Compare current solutions to similar challenges.

▶ Policy Check-in

Check with your policy team to ensure that they are aware of your prototyping work, and to ensure that the policy implications of the prototype are understood.

Recruiting

Recruiting is part of logistics but is often the task that can delay projects. As found in the Discovery Phase, recruiting is hard work and there is more of it when it is time to test a prototype.

The service transformation project reaches a key point when new ideas outside the public service are shared. Sharing these ideas with the right people will get the right kind of feedback.

So the challenge is describing the right people, finding them, and then scheduling time to meet with them to test the prototype.

Past participants from earlier Discovery work are great sources for this recruiting effort. They, themselves, may be willing to try out the prototype or they may be able to refer friends or peers who would be interested in participating in the testing.

The Service Design Methods & Tools provides more [information about the logistics of recruiting](#).

Logistics

To stay on track with the schedule, start near the beginning of the prototyping phase to recruit participants, schedule testing, book test locations and organize the evaluation team.

To make the best use of time, begin planning as the specific prototype concepts are selected from the Opportunity phase. The same discussions that determine the types of prototypes the team will create will also shape the type of evaluation that needs to be planned.

The initial Privacy Impact Analysis (PIA) should include a section on prototype testing with participants. If the anticipated evaluation approach has been changed, the PIA may need to be revised. This is especially important for actual production use of a prototype in helping to manage some, or all, real life examples with actual clients in need of a service.

Running the Test Sessions

Test sessions typically have a moderator and one or more observers or assistants. Ideally, the moderator is not part of the team that came up with the concept or designed the prototype, as they may be more comfortable with any confusion or criticism from the participant than an actual team member.

The moderator interacts with the test participant, gets informed consent by briefing them on the testing procedure, and guides them through the test. Observers and assistants watch the tests and may help with logistics, cameras, paperwork, etc. Observers typically refrain from interacting with participants in the test until invited to do so by the moderator. This invitation usually occurs near the end of the test session as it lowers the risk of creating biases of the test participant.

Planning and Running Prototype Tests

The type of testing depends on what the team needs to know from the prototype. Typically one or more of the following four approaches for testing new services and service improvements are used in the BCPS, although not all at the same time.

1. Demonstrate a proof of concept so that it makes sense and the overall service fits client needs.
2. Task-based usability testing scenarios to get a detailed view of how specific service activities work.
3. Pilot how a service would work over the course of an actual case or file but using the prototype to deliver the service.
4. Perform a design review with experts or staff to collect their structured feedback.

These are four main types of testing but other approaches are possible. [The Service Design Methods & Tools has more detail about testing methods](#).

Prototyping Test Guidelines

Use the following key success factors to tailor the testing approach.

Make It Real

Make ideas concrete. Nothing makes a bigger difference to creating successful services than making them tangible early in the design process. Instead of talking about an idea, now is the time to make it real.

Keep Your Options Open

Early prototypes should be exploratory—look at multiple solutions, rather than fixating on the first one (just like in brainstorming, do not stop with the first good idea). After going broad with the exploration, use feedback, testing and iteration to narrow your options.

Decide Faster With Concrete Models

Having a tangible, concrete model lets the team, sponsors, clients, and other stakeholders have a shared understanding that speeds up decisions. When everyone can see the same thing, communication is more efficient and decisions are easier.

Make It, Try It, Test It, Use It, Prove It

How can the team prove that an idea will work? Well, a good place to start is to make it real. Actually trying out an idea, using it, and having clients take it for a test drive with a prototype lets the team see how it works (and where it needs improvement).

People + Prototypes = Confidence

Confidence comes when the team and clients work with prototypes. When the team sees people using the prototypes they gain confidence in the concepts, and can be more effective stewards when making the investment in implementation. This confidence grows as the team and clients work to co-design prototypes and concepts, as well as when prototypes are tested to evaluate what works and what can be improved. When the team and stakeholders see a prototype, each have a much clearer vision and a better expectation of what's needed for implementation.

Low-Fidelity Now Is Better Than High-Fidelity Someday

Teams do not have to invest a lot to make a prototype—from a quick sketch to a jury-rigged service counter using a couple spare desks, quick prototyping lets teams understand, explain, and improve ideas much faster. Teams do not have to wait until they have a polished prototype to try things out—delaying the power of prototyping robs teams of insight that can be best applied early on.

Iterate. Iterate. Iterate.

Ideas won't be 100% when teams start prototyping. That is why working quickly lets teams understand what works, what doesn't, and where they can improve. Then teams can iterate (or cycle through) prototyping and testing again. Sometimes iteration will even take teams back to Discovery or Opportunity work to get the answers needed to make the solution better.

Controlled Learning vs. Public Failure

Failure is a reality; ideas and implementation will never be 100% from the start. Prototyping and iteration helps keep failures small, under control, and fuels learning and improvements. Implementing without prototyping exposes teams to the risk of very public and expensive failure. But failure with iterative prototyping is just part of the innovation process, like Edison and his team's 3,000 different attempts to find the right material for incandescent light bulbs. Prototyping shifts the focus of failure from blame to learning.

Involve the Whole Team

Include policy and technical staff who can help understand the implications, constraints, and needs for opportunities and prototypes.

Analyzing and Reporting Test Findings and Recommendations

The evaluation team shares observations, forms insights, and creates recommendations similar to analysis in the Discovery phase. Bringing the entire prototyping team into the analysis and debriefing workshop minimizes the need for formal reporting and accelerates improvements in the prototype.

More formal reporting, including detailed analysis of time on task, video highlights and verbatim quotes, are presented to appropriate governance/decision body.

Prototyping Iteration and Refinement

Based on the test findings, the prototype should be refined. This process of iterative design improves the service approach and helps to strengthen it for real world implementation.

Managing the number of iterations and the amount of refinement needed will be required. There is a point of diminishing returns, so be cautious to not spend time creating the perfect prototype. Effort is better spent on actual implementation.

Prototyping Testing Deliverables

In this phase, prototypes will be created and evaluated, and insights will be gained to assist with completing the Service Blueprint for the Roadmap phase.

Prototyping Testing Results

By making ideas concrete, it will be easier to explain them, create common understanding, test those ideas in the real world and improve them. This builds confidence as the team moves forward. That confidence comes from reduced risk, increased innovation and ongoing service improvement.

The Prototyping Phase allows the core team to quickly learn, and improve a service, through iteration before rolling out the full program. It also assists the team with creating understanding on how to execute the service and understand what the organization needs in order to transform service delivery.

Prototyping Testing Duration and Effort

Prototyping typically takes two to four weeks. Duration depends on several factors, such as:

- ▶ The number of prototypes
- ▶ The complexity of the prototypes
- ▶ Depth of testing and evaluation (number of people and different testing approaches)
- ▶ Number of iterations or revisions of the prototypes

Beware of the Perfect Prototype

Be careful of becoming trapped in chasing the “perfect prototype”. Iterate prototypes to improve them, but do not iterate forever. Move on in the process when there are enough insights to be confident in the concept and enough information to complete the Blueprint and Roadmap.

ROADMAP PHASE

Roadmap Overview

The Roadmap phase finalizes the deliverables and shows the prioritized approach for realizing opportunities. This is outlined in a Roadmap report along with a large infographic illustrating the high-level timelines for implementation. The Roadmap draws on the project opportunities, prototypes, infographics and other artifacts to make this approach visual, concrete and clear.

Roadmap Activities

Preparation

A great deal of work will already have been accomplished – so much so that the work to date will need to be reviewed. Look through the discovery findings, opportunity documentation, and prototypes and testing results. Use these as the foundation to finalize deliverables and complete the roadmap.

Blueprint Finalization

If deemed a requirement for the project, the team will work throughout the service design process to complete the Service Blueprint. However, at the Roadmap stage, the Blueprint will be finalized with the core team based on what they have learned through Discovery, Opportunity, and Prototyping phases.

Other participants may be invited to help the team finalize the blueprint so that it reflects the full cross section of capabilities the organization requires in order to deliver the new or improved service.

Continue to use or modify the [Blueprint Working Template](#), or create a more customized and visually polished Blueprint.

Roadmap Workshop(s)

When the Opportunity and Prototyping Phases are complete, or when the Service Blueprint is finalized, the core team will be ready to lay out the roadmap. The roadmap shows the organizational activities and capabilities, and aligns them by when the organization is able to implement them.

It is recommended to start the road-mapping with a workshop similar to the following:

- ▶ Review any blueprints the team may have created
- ▶ Use sticky notes to sort the blueprint capabilities and organizational activities into related clusters.
- ▶ Create streams or swim lanes of the types of effort needed, such as:
 - ▶ *Client Interface*
 - ▶ *Operations and Processes*
 - ▶ *Policy and Legislation*
 - ▶ *Organizational Staffing and Structure*
 - ▶ *Technical Systems*

Keep the bottom swim lane reserved, as the team will want to use it to show the value of the individual investments.

- ▶ Organize the clusters in the related swim lanes based on:
 - ▶ *Overall timeframe of the project (use years as the Roadmap timeline—Year One, Year Two, Year Three; paired with more relative timing—Now, Soon, Later, Someday.)*
 - ▶ *Dependencies (what things need to come before other things)*
 - ▶ *Connections to other ministry or government projects and capabilities*
 - ▶ *High-level estimates of resources, time, talent or budget needed*
 - ▶ *The capacity of the organization*

Some clusters may need to be split across the timeframe because of the specific dependencies between different pieces of the cluster; some may also split over different areas of implementation, from policy to the frontline counter.

The team may find that road-mapping will raise questions about how the organization will deliver a specific capability. Sometimes the answers will be very clear; other times the questions will point to unknowns. The core team does not need to know everything to create the roadmap; however, they will want to make sure that some of the early roadmap activities are used to help fill in the blanks. This will assist in creating a learning organization that can deal with the unknowns. Often, this may mean that things like governance and staffing should be addressed early on in the roadmap.

- ▶ **Make Value Clear**

To show the value of the individual investments, use the bottom row reserved on the swim lane chart. As activities are arranged, explain the value that different elements or clusters bring to the organization and to stakeholders.

Roadmap Refinement

The team will need to move from the collection of sticky notes to a more polished document by creating an infographic that shows the overall roadmap. Use the [Roadmap Template](#) or create a more refined version in software such as Adobe Illustrator.

Roadmap Reporting

The roadmap will need to be explained to others; however, members from the team will not always be there when people need that explanation. The Roadmap Report simply introduces the project, summarizes the key findings, and describes each Roadmap Activity, Capability or Value existing in the Roadmap Infographic. Use photos, screenshots, or even links to video or online prototypes to help explain different Roadmap elements. As attachments or appendices to the roadmap, also include references to other deliverables, such as personas, journey maps and the Service Blueprint.

Project Case Study

Share the wisdom the team has gained on the project with others. The lessons learned from the project will help improve the return on investment for future projects, and help smooth the way for future efforts in the organization and other ministries.

Every service design project is different although every service design project has something to teach others in government.

By creating a short case study and sharing it with others, the ministry team will gain more appreciation for their own work and set the stage for greater success for individuals, the team and the BC Public Service. The Strategic Design and Transformation Branch (SDTB) can help with this development.

Roadmap Deliverables

Final Service Blueprint

Is the complete blueprint of the service, showing the organizational capabilities needed to deliver the service. Includes policy, operations and the frontline client interface. Not all projects will require a Service Blueprint as a deliverable.

Roadmap Infographic

A high-level timeline for implementing needed organizational capabilities. The roadmap also ties these capabilities to the value that they deliver.

Roadmap Report

A report providing a summary of the project, a detailed explanation of the Roadmap Infographic, and pointers to other project deliverables, especially the Service Blueprint if one was created.

Case study of project

A summary of the project and lessons learned to share with others inside and outside the BCPS.

Roadmap Results

The roadmap creates alignment. It demonstrates the commitment necessary and the value generated by service transformation. It communicates a clear path for executing the vision. Through communication and visualization, the roadmap establishes shared understanding and outlines future priorities and plans. This clarity reduces the risk for follow-on projects focussing on different priorities than those outlined in the roadmap.

By sharing the service-design experience with others, the team has the opportunity to reflect on their practice, and become more mature and capable in delivering transformation efforts. Ownership of projects is increased through public and peer commitment as teams and ministries become more accountable in the course of sharing their learning. This sharing also supports others as they take on their own service design projects. Creating a habit of reflection and learning builds institutional memory and culture for ongoing transformation and innovation.

Roadmap Duration and Effort

Two weeks

Examples & Templates

[Ministry of Children and Families](#)

[Early Years Roadmap](#)

[DriveBC Roadmap](#)

[Roadmap Template](#)

Roadmap Guidelines

Use the following key success factors to tailor the roadmap approach.

Buildings Need Blueprints; So Do Services

Just like a building, a service needs a blueprint that shows how all pieces work together to deliver the service and create value. A Service Blueprint shows what an organization needs to do in order to deliver a specific service experience from frontline staff interaction and support to operations, infrastructure, policy, HR, regulation and legislation.

Roadmaps make Priorities Clear

A roadmap shows a high-level overview of timelines for implementing service improvements. It reflects the priorities of both the organization and its clients. The roadmap should be informed by existing transformation planning, as well as inform ongoing strategy and planning work.

One Big Map is Better Than a Dozen Binders

Using large maps allows teams to understand the overall scale, people involved, service components, and relationships between different elements of the service system. This understanding helps teams to comprehend follow-up reporting much better.

Connect Policy and Delivery

There is often a gap between policymaking and frontline service delivery. A roadmap should connect policy and delivery by showing how each contributes to the service experience. This connection goes both ways. Service design Discovery and Opportunity should bring frontline insights to inform policymaking. Service design prototyping, journey mapping, blueprints, and roadmaps, all help convey policy intent for implementation.

Show Shared Value

Describe the benefits and value for both government and clients as part of the roadmap report and infographic. Show why these service investments make sense for British Columbians.

Share Project Wisdom

Sharing project experience and learning improves all team members' abilities and helps others as they tackle similar service transformation. Create a case study and share it within the BCPS, stakeholders and others.

IMPLEMENT PHASE

Implement Overview

The Implementation phase is about setting a client's project up for success through a continuous improvement framework that creates an improved experience for citizens and stakeholders. Recommendations from the Roadmap Phase will direct the project into the Implement Phase. At this stage, prototypes and iterations come to life and become useful services for people.

Implement Activities

There are several ways to work towards project implementation after finishing the Prototype and Roadmap phases. Working with the project team to determine the best approach is the first step in the process. [Agile Approaches](#) applied to project outcomes that require a digital solution. An agile approach, used in product development, helps with responding to unpredictability through incremental, iterative work, and empirical feedback.

As described in the Prototype Phase, development teams need to make decisions in the Implement Phase that reflect the overall vision, so it is important to work with the right teams and stakeholders to develop and launch prioritized opportunities. Involving development teams early in the prototyping process will help them understand the implementation needs. Alternatively, this ensures that research findings and prototype testing insights are shared throughout the process, which will lead to future opportunity implementation.

Implement Deliverables

Before a service is released to the general public, take stock of the entire process and ask the following questions:

1. Does the service meet the user needs highlighted through Discovery?
2. Has it been rigorously tested, with users both internal and external?
3. Is it safe and secure?
4. Can it be iterated on over time, as new insights are gained from analytics tracking and continued user feedback?

Deliverables from the Implement phase may include the following:

- ▶ Standards and guidelines for digital solution
- ▶ Understanding of resources required for ongoing maintenance and project governance, aligned with maintenance and governance plans
- ▶ Identification of measurement opportunities for tracking service improvements over time
- ▶ Roadmap for implementation of future design opportunities

Implement Results

This phase, in conjunction with the Roadmap Phase, will help to communicate a clear path for teams to realize future opportunities and follow a vision beyond the launch of a product or service. The roadmap as an artefact can be used to create a shared understanding, set priorities, and support the development of future products or services. Measurement opportunities identified for tracking service improvements over time will help to support performance baselines for improved service delivery, as well as future strategic direction for policy changes, financial management and change management for program areas and ministries.

Implement Guidelines

Any service design challenge can be solved through the iterative stages of the Playbook, however, maintaining an organization's motivation and commitment to change, is critical to the success of a project. The following are guidelines to ensure the project team enters into the Implement Phase with a strategy and a realistic product to develop.

Don't Leave it till the End

The Implementation phase should be considered from the Alignment stage of the project. Asking, how do we make it real? from the start, will ensure that the success of the project outcomes will encourage effective change in the organization. This phase is all about putting the vision into effect and making it real.

Have a Decision Point

The Opportunity phase should reflect on the potential of the end product. Consider a decision point that considers the team's readiness, budget for product, and timeframe to implement.

The opportunities stage should consider the following questions:

1. Is this prototype something that can be implemented?
2. Which of the opportunities could realistically make it to implementation?
3. Is the prototype feasible for implementation?
4. Who can potentially develop the product from the prototype?

One Size Doesn't Fit All

The Implementation phase can occur in many different ways, which can all have different outcomes. Different sets of resources and solutions can be utilized to develop a service past the testing and prototype stage to develop an end product. Resources to develop these products could include:

- ▶ Government Digital Experience Division (GDX) Development Team
- ▶ Ministry Information Management Branch resources, staff, vendors
- ▶ Project vendors

Articles

Read further about [Service Design Implementation and Innovation in the Public Sector](#) by Maria Kristine Bækkelie, from the Norwegian University of Science and Technology, Product Design Department.

APPENDIX A: THE HISTORY OF SERVICE DESIGN

Today, the Government of British Columbia has committed to service design as an important discipline to develop within the public service in order to support the transformation work needed in 21st century government. This commitment is a natural extension of the practices of the public service, and builds on a rich history that contributes to designing things that work better for people.

That history starts at the turn of the twentieth century, where new approaches to business demanded new ways of working.

In 1908 Henry Ford opened the first Model T assembly line, and sparked new ways of thinking about products, work and services. In 1911, Frederick Taylor published *Scientific Principles of Management*, a book that focused on improving efficiency by **reducing the time taken to complete tasks**. During that same period of manufacturing growth, Frank Gilbreth (of *Cheaper by the Dozen* fame) developed motion studies, focused on **improving workers' well-being** and task efficiency by reducing unnecessary motion. His wife and business partner, Lillian Gilbreth, brought **psychology to improving productivity**.

In part, as a reaction to the narrow focus of efficiency, in the 1920s and 1930s the Bauhaus school **integrated design into people's daily lives**.

*"The common error of today is that usually questions of efficiency are viewed from the technical and profit standpoint, without regard to organic considerations. The Taylor system, the conveyor belt and the like remain mistakes as long as they turn man into a machine, without taking into account his biological requirements for work, recreation and leisure". — Laszlo Maholy-Nagy in *The New Vision: Fundamentals of Bauhaus Design, Painting, Sculpture, and Architecture* (1938).*

The Bauhaus designers wanted to **humanize efficiency—to make working meaningful**, and not just more affordable for owners or controllable for management. This extended to a human-scale perspective not only on work, but also on everyday living.

World War II provided a focus for industrial excellence, and industrial design and ergonomics matured as they were applied in the war effort. During the war, **better design meant better capabilities**—things not only looked better, they worked better. Industrial designers and architects applied these design principles throughout the war, including Henry Dreyfuss (designer of the iconic Bell telephone), Raymond Loewy (designer of the interiors for NASA's Saturn rockets), Charles and Ray Eames (best known for their groundbreaking contributions to architecture, furniture design, industrial design and manufacturing, and the photographic arts), and Buckminster Fuller (inventor of the geodesic dome).

The post-war period was a golden age for design, and mid-century modern design saw the **democratization of design**—everyday people began to be conscious of good design and look for it in their homes and in their workplaces. Design became an expectation.

Design also grew as a profession with a repeatable, understood process. Henry Dreyfuss wrote the classic *Designing for People* in 1955, encapsulating many principles for human-centred design that we still use today.

The 1950s and '60s also saw the **birth of systems thinking**, a holistic view of the connections and relationships between the different elements that join together in a particular context. Nobel winner

Herbert Simon collected a series of lectures and essays in 1969s titled, *Sciences of the Artificial*, where he outlined the core purpose of design: “. . .the designer is concerned with how things ought to be—how they ought to be in order to attain goals, and to function.” This big-picture view connected individual interactions and services into a larger context.

The late '60s and early '70s added a new understanding of complexity in systems, including social systems. Horst Rittel coined the term “**wicked problems**” to refer to complex, intractable policy challenges that resist simple changes in the late '60s, and explained the concept in 1973 in Horst & Webber *Dilemmas in a General Theory of Planning*. 1973 also saw Thomas Watson Jr., the CEO of IBM, declare in an address at the University of Pennsylvania that “**good design is good business**”.

The 1980s saw a new focus on services and their design, pioneered by Lynn Shostack's works such as *How to Design a Service* (European Journal of Marketing, 1982) and *Designing Services that Deliver* (Harvard Business Review, 1984).

The '80s also saw **human-centered design incorporated into design for computer systems**. Early examples of this practice include: Jef Raskin leading early design efforts on Apple's Macintosh project, and Don Norman's *User-Centered Systems Design* (1986), a collection of essays from academics and practitioners across the industry.

The 1980s effort also brought a renewed inclusion of **social science into design practice**, including psychology, sociology and anthropology. Liz Sanders was hired in 1982 as the first psychologist at a design firm (Fitch).

Throughout the '80s, **design began to be embedded in business** with greater rigour.

The 1990s launched a lengthy discussion of the service economy, as significant growth clearly came from the service sector. The dawn of the web also served as a catalyst to bring together thinking and design about services, computer systems and products. This led to discussions of experience design that integrated products, services, and orchestrated them over time, as in Pine and Gilmore's *The Experience Economy* (1999). This shift recognized that design was not simply about products, but the **integration of those products with services to create valuable experiences**.

The '90s also saw the emergence of **design thinking**—the idea that the attitudes, logic, mindset, and methods of design offered a new and different approach for addressing all kinds of complex social challenges, most popularly in Richard Buchanan's *Wicked Problems in Design Thinking* (1991) and Peter Rowe's book *Design Thinking* (1991). This use of design as an innovation approach continued with work such as Richard Boland and Fred Collopy's collection *Managing as Designing* (2004). The first dedicated service-design firms were founded in the early 2000s, along with service-design practices developing in established consultancies and internal teams.

This set the stage for service design as it is practiced today: a human-centred approach that draws on many disciplines (from social science to product design to user experience to design thinking, systems thinking and innovation). Service design adopts the most useful elements of these disciplines to help create great services.

Today, service design is a best practice. British Columbia is a global leader in adopting and supporting service design in government. In the BC Public Service, we have committed to human-centred design in *Citizens @ the Centre* in 2010, and more recently with [the minister's response to the Digital Services Consultation in 2013](#), where service design will be a component of any significant new digital services created.

The Playbook helps public servants as they adopt these methods as part of their regular work.

APPENDIX B: SERVICE DESIGN AND OTHER BC PUBLIC SERVICE APPROACHES

Government as a whole is shifting to a citizen-centred service model, and is employing many approaches that support service innovation, transformation and improvement. While there are some common things in these approaches and perspectives, they all offer particular value and complement one another. These tools offer the most value when they are considered and applied in conjunction with each other.

The most common approaches within the BC Public Service (BCPS) that integrate with service design include:

- ▶ [Citizen Engagement](#)
- ▶ [User Experience Design and Internet Strategy](#)
- ▶ [Lean](#)
- ▶ [Enterprise Business Architecture](#)

Citizen-Centric Service Architecture

Each level of service architecture raises questions, and highlights challenges and opportunities, that can only be addressed at other levels. This works both up and down the continuum. The most common pattern seen when working with the BCPS is gaining new insights into the client experience, with those insights then driving change within other levels. Empathy, insights, and metrics become catalysts for organizational change.

To understand the people involved, and the overall service ecosystem with which we must integrate, combine these service architecture elements with the phases of the BCPS Service Design methodology: Alignment, Discovery, Opportunity, Prototype and Roadmap.

Service Design and Agile

What is Agile?

Agile is a mindset based on the [2001 Agile Manifesto](#) which supports:

- ▶ Individuals and interactions over processes and tools
- ▶ Working software over comprehensive documentation
- ▶ Customer collaboration over contract negotiation
- ▶ Responding to change over following a plan

Some key benefits of agile are:

- ▶ The ability to reduce risk
- ▶ Speed up time to value
- ▶ Respond to user needs and expectations

Processes, tools, documentation, contracts and plans are still important and often necessary; however, the agile mindset places a preference on individuals, interactions, working software, collaboration and responding to change.

The Agile Manifesto is supported by a number of *principles* and combined, they form the Agile Framework. The manifesto and principles are understood through a number of methodologies, including Scrum, Extreme Programming (XP), Kanban and others. As a service designer, you can use the Agile Mindset and methods in all of your work.

These methodologies have evolved their own language and approach. Agile started out as an alternative approach to software development, intended to maximize value early by reducing complex up-front specifications and processes. Today, agile is applied more broadly as a way to manage many other types of work—from policy making to service design to managing collaboration.

For teams familiar with traditional waterfall methods, agile can come as a bit of a shock. The waterfall process is frequently characterized as having significant up-front effort on documentation, such as project charters, Gantt charts, and functional and non-functional requirements specifications, with user feedback and acceptance only coming at the end of the process. This can often lead to expensive, awkward or ill-conceived changes in order to try and fix any issues that don't meet user needs.

Agile principles show a different approach, particularly:

- ▶ Principle 1: Our highest priority is to satisfy the customer through early and continuous delivery of valuable software; and,
- ▶ Principle 7: Working software is the primary measure of progress.

How do Service Design and Agile work together?

If agile is a mindset for solving specific problems by continuously delivering a working product or service, then service design is all about identifying what problems need solving in the first place. The Playbook phases are designed to help frame problems and start to define the outcomes and objectives by uncovering the actual needs of users and stakeholders.

Service designers understand and map what audiences say, think, feel and do. This discovery research surfaces insights that often otherwise have been missed. These insights into people's experiences and behaviours help teams understand opportunities and generate ideas for service improvement, which Agile teams use to help inform their design. Often after the initial research and insights activities, Agile teams will work with the tools created by service designers: journey maps, personas and use cases to prototype and test designs. Based on these foundations Agile teams are able to iteratively turn requirements into better digital service solutions.

On many service innovation efforts, service design is a whole phase near the beginning of the process. It provides definition on what sort of solutions might be useful—changes to face-to-face, call centres, print, digital, and even policy and organizational structures—ensuring that the right solutions are pursued. This work can lead to an implementation phase that incorporates agile methods and approaches, with service designers contributing insights into user needs and assisting with design for the product or service.

Service design and agile may also be linked from the beginning of a project, with 'design sprints' starting in early phases of the work and continuing throughout. This capitalizes on the value of service design when applied in short iterative loops of assessing user needs, designing, testing and evaluating solutions. Working closely together, and adopting agile methods in service design, can accelerate the ability for teams to deliver value to citizens.

Resources

[*Agile Scrum Guide \(Internal BC Resource\)*](#)

[*The Gov.UK Service Design Manual on Agile*](#)

[*Gov.UK Introduction to Designing Government Services*](#)

[*Gov.UK on Agile Development*](#)

[*Combining Agile and Design Thinking*](#)

[*A Service Designer in Agile Land \(blog\)*](#)

With some careful planning and motivation, it's possible to bring service design and agile together to successfully create an MVP—a minimum viable product. An MVP is the smallest functional unit that real clients can use to achieve a goal. Combined agile and service design teams build towards an MVP, and then expands from there by designing, building, and testing new components that meet user needs. This iterative and incremental addition requires a dual approach to keep the big picture in mind while working on the details. Early service design work in discovery and opportunity can help teams stay on course while working through iterations of prototypes, MVPs, and production services.

Service Design and Behavioural Insights

What is Behavioural Insights?

Behavioural insights (also known as behavioural economics, or nudging) is a form of low cost evaluation for policy problems that have a behavioural component. It draws on knowledge, or 'insights', from the behavioural sciences about how people think, behave and make decisions under different conditions, and uses them to improve the design and delivery of programs and services.

Research tells us that humans are vulnerable to biases, use mental shortcuts, are swayed by emotions and gut instincts, and are strongly influenced by their peers. These behavioural tendencies, among other cognitive and environmental factors, can influence whether, and how, citizens engage with government. Behavioural insights seeks to understand those behavioural drivers and find solutions that make it easier for citizens to access programs and services and to comply with legislation, regulations and policies. According to the Behavioural Insights Team in the UK—global leaders in this practice—if policymakers want to encourage a behaviour or improve decision-making for citizens, they need to make their programs and services *Easy, Attractive, Social and Timely (EAST)*.

Core to the behavioural insights practice, and what distinguishes it from other policy levers and disciplines such as service design, is applying scientifically rigorous experimental methodologies, like randomized controlled trials, to test the relative effectiveness and impact of behavioural interventions (for example, solutions to the policy problem). These solutions are usually tested alongside a 'business as usual' or control condition to really understand what works best (and what doesn't) to achieve the desired behaviour shift. Interventions that work can be implemented and scaled up.

Behavioural insights has been applied in a wide variety of policy areas from taxation, medical screening, and charitable giving, to voter registration, road safety and energy conservation. In some jurisdictions it is even being used to tackle complex policy problems such as poverty and homelessness.

Behavioural Insights in the BC Public Service

The Behavioural Insights Group (BIG) was established in the BC Public Service (BCPS) in October 2016. It is the second provincial group in Canada, and part of a growing global community.

With a mandate from the innovation agenda outlined in the [2016 Where Ideas Work](#) corporate plan, BIG exists to facilitate policy innovation across the province by building behavioural insights literacy and capacity within the BCPS. BIG also collaborates with ministries, agencies, and academic partners to co-design low cost evaluation projects that enhances the citizen experience, and ultimately improves outcomes for British Columbians.

How do Service Design and Behavioural Insights work together?

Behavioural insights and service design are highly complementary disciplines—they both put citizens at the centre, and engage in ‘policy by design’ by using tried and tested methodologies.

Service design relies on direct, behavioural, systemic research with citizens and other stakeholders to understand context and opportunities. As a service designer you can investigate policy problems, generate ideas, determine existing measures or new ones to help monitor the service experience and service improvements, and recommend prototype solutions for empirical field-testing by behavioural insights teams.

Conversely, behavioural insights teams can draw on the rich qualitative and service analytics data gathered in the discovery phase and prototype and test phase of the Playbook, to inform problem definition, solution generation, and scientific hypothesis testing of prototype ideas.

Working together, these two innovative disciplines cover the policy problem lifecycle, from discovery through to testing and implementation, and offer significant potential to address policy problems of varying scope and complexity.

Resources

[*EAST Framework: Four Simple Ways to Apply Behavioural Insights*](#)

[*OECD Case Studies*](#)

[*UK Behavioural Insights Team*](#)

Service Design and Citizen Engagement

What is Citizen Engagement?

Citizen engagement is an ongoing activity across government, used to create a conversation and gain citizen input. It takes place on a variety of scales and for a variety of purposes, ranging from broad questionnaires to town halls, citizen forums or focus groups. Engagement is used to create a conversation and gain input into decision-making. It is the process of inviting feedback and input from citizens on programs, policies and services that impact their lives. Engagement represents a significant policy and communications activity of government, ranging from high profile projects that gather large amounts of public input from around the province to local processes that gather public input on regional infrastructure plans or public services. That continuum of engagement depends on the context and needs of decision makers in government.

How do Service Design and Citizen Engagement work together?

Service Design and Citizen Engagement share a focus on citizens, and can work together to gain insights for better services, and better awareness inside government about citizen needs.

The results of consultations and engagement are important factors in service design. The behavioural research that service design does on the frontlines often fills in the blanks left by broader engagement activities, and can provide useful information for engagement efforts in ministries as well.

For more information about citizen engagement, see engage.gov.bc.ca

Service Design, Data Science and Advanced Analytics

What is Data Science and Advanced Analytics?

Data science and analytics uses sophisticated methods and tools to find insights from different data points across programs, services, and whole sectors. Quantitative and qualitative analysis are both key to understanding, measuring and predicting success – from immediate impacts to long-term outcomes for policies, programs and services.

The insights from connecting different data sources together provides a much more holistic view of what is happening—this view allows data science and analytics teams to make the connections that are key to better evaluation of programs and services to building policy and making more informed, data-driven program decisions to service improvements and new service innovations.

Data Science and Advanced Analytics in the BC Public Service

The Centre for Data-Driven Innovation (CDDI) in the BC Public Service (BCPS), is a team dedicated to improving access and use of public sector data. CDDI is working to enable access and analysis of data in new ways to support evidence-based policy, programs and decision-making.

With first-class privacy and security measures, CDDI will provide a secure place where government data can be safely linked and analyzed to solve real-world problems. It will encourage innovative uses of data and guide the translation of data insights into government actions, while protecting confidentiality and privacy.

CDDI is leading the development of this service in government by creating infrastructure and tools, partnering on catalyst projects and corporate priorities, as well as working on policy and culture so that B.C. public servants are more aware of the power and possibility of data-driven insights.

How do Service Design, Data Science and Advanced Analytics work together?

CDDI's work establishes an uncomplicated environment for cross-government data discovery and, in the process, drives evidence-based decisions that improve the policies, programs, and services we provide to citizens.

Data Science and analytics on public sector data can provide a holistic picture of the citizen experience, and provides opportunities to collaborate with service design teams in several key ways:

- ▶ **Using Data Insights**

Relying on insights from data to identify areas that need service improvements and innovation, modeling and measuring potential outcomes and showing results from service innovation.

- ▶ **Combining Qualitative & Quantitative Insight**

Bringing qualitative and quantitative insights together to provide a more holistic understanding of citizen needs and service experiences. Insights from service design projects provide data science and analytics teams with greater focus on what is most meaningful in people's lives—where are the key points in the citizen experience, and how might data science and analytics explore these areas for additional insight?

- ▶ **Ensuring Analytics Services Are Easy to Use**

Developing and designing data science and analytics as a service by ensuring that data sets are consistent, searchable, and accessible, and that tools and infrastructure are safe and user friendly.

Using Data Insights

Service design can draw on the insights from data science and analytics during initial alignment and discovery work to better understand pain points, service delivery challenges, and highlight areas for deeper research and design. Data science and analytics assist with revealing opportunities that target service improvements, cost savings, and other benefits.

Quantitative analytics can tell us the ‘what’ in different metrics, but often cannot tell us the ‘why’. Service design uses qualitative field research to uncover the underlying systems and connections to show why and how specific insights from data science and analytics are playing out that way.

As a service designer, you can collaborate with data scientists to:

- ▶ **Identify potential business problems** to be explored by data science and advanced analytics, which in turn could identify potential solutions that can be modeled to predict service impact
- ▶ **Create performance baselines** for service delivery
- ▶ **Aggregate** quantitative information for services
- ▶ **Identify Key Performance Indicators** and conversion targets, which support performance management
- ▶ **Foster collaboration** between multiple teams and disciplines within the broader public sector
- ▶ **Set strategic direction** for policy changes, financial management and change management
- ▶ **Find cost savings** and process efficiencies across channels for service delivery areas

Resources

[*Where Ideas Work, A Corporate Plan for the BC Public Service*](#)

[*TED@BCG Talk: The Complex Relationships Between Data and Design in UX*](#)

Combining Qualitative and Quantitative Insights

Program areas in the BCPS gain a more holistic and complete picture of their users by combining the reach of data science and analytics with the rich and ‘thick’ description of qualitative field research. By having first-hand insights into the lived experience of citizens, service designers can help analytics teams measure what matters. Knowing the defining moments in an experience helps analytics teams focus attention on the most meaningful parts of the experience; both in developing metrics and in monitoring them over time to determine outputs and outcomes.

Ensuring Analytics are Easy to Use

Service design approaches can be used to help design data science and analytics programs to ensure they are easy to use and meets the needs of users. This will help increase adoption and use of analytics as a regular part of evidence-based policy making, and other decisions that benefit from the evidence data science and analytics offers.

Example: New Zealand Welfare Reform

Targeting the risk factors of long-term benefit dependency

CHALLENGE

One of New Zealand's priorities for better public services is to reduce long-term welfare dependence. Cross-agency data allowed the Ministry of Social Development (MSD) to estimate the risks of welfare dependency among the most vulnerable group: teen parents and young people unable to live with their families.

APPROACH

The Ministry discovered that more than 70% of its total welfare expenditure was attributable to those who entered the welfare system under 20 years of age. The Ministry was able to predict the probability of this population going onto an adult benefit and, in turn, offer targeted services intended to reduce their long-term benefit dependency. Services included being matched with a personal mentor, learning budgeting skills, and receiving additional education or training. The Ministry applied similar analytics to sole parents and, through targeted investments in education and job placement, reduced sole parents on benefits by 9.4%.

DATA

Laws now facilitate data sharing between agencies. MSD can look beyond case-by-case issues to gain a lifetime view of its clients, using matched data. Multiple agencies contribute data, including Child, Youth and Family service use, and benefit receipt over time. In addition, the data was used to create a baseline valuation of the entire welfare system and explore further predictive risk modelling for child abuse.

OUTCOME

Using analytics, MSD targeted welfare policy to improve outcomes and save money. Their strategy worked, as findings reveal that those who received targeted services moved onto an adult benefit at the lowest level in five years, with employment rising 9.3 percent in 2013. The targeted investment approach is expected to save \$1 billion over four years.

Service Design and Enterprise Business Architecture

Enterprise Business Architecture (EBA) and service design work go hand-in-hand to create better service experiences. In parallel with service design, one of the goals of EBA is to understand the business problem (or innovation opportunity) and articulate how addressing that problem, or opportunity, furthers corporate goals.

EBA sees the world "horizontally". It seeks to leverage similar concepts across government – whether people, processes, and/or technology—to meet business needs with efficiency and consistency, while considering the collective strategic alignment of all ministries' objectives to government vision.

When an initiative is first identified, the intersection between service design and EBA disciplines is wide, and begins very early. While service design goes deep, heavily involving stakeholders top to bottom,

EBA's focus is in matching patterns across the organization – within ministries, across ministries, and across government – to connect similar objectives, and the people who work them. This aims to prevent re-work and redundant cost, to re-use business solutions (where appropriate,) and to examine service offerings for leverage in their entirety, or for component-re-use.

Engage the Enterprise Business Architecture team briefly at or around the same time as the Strategic Design and Transformation Branch (SDTB). Engaging the EBA team early benefits initiatives with a more robust alignment to corporate objectives, and in identification of opportunities for re-use, both in consumption and delivery.

Service design benefits from early EBA engagement through heightened awareness of similar services in government and how they've been addressed.

For example, a brief engagement with the EBA Team could assess the strategic alignment of one or more investment proposals within a ministry or program area. This could re-enforce the strategic alignment of the initiative, as well as help to prioritise those initiatives that best support ministry and government-wide strategies. It could also highlight the components and enablers that may be consumed by the initiative in question, and likewise, components that might be offered-up for consumption.

The desired result is a more effective, consistent, and government-holistic service through the collaboration of service design with EBA.

For more information about Enterprise Business Architecture, please contact the [Office of the Chief Information Officer](#).

Service Design and Lean

What is Lean?

Lean is a continuous improvement discipline used by governments and corporations around the globe. Originally developed more than 50 years ago at Toyota in Japan, it focuses on empowering employees to improve customer service by getting rid of unnecessary rules, processes and steps. Doing this improves services to customers and frees up employee time, so they can focus on more value-added work.

Lean is best described as a flexible set of tools that can be applied to improve everything from simple work-unit processes to complex, citizen-facing services. Larger Lean projects follow a specific methodology, which is referred to as DMAIC (Define, Measure, Analyze, Improve, and Control), but improvements can also be made through something as simple as a Kanban board, a tool that enables staff to see and optimize the flow of their work.

How do Service Design and Lean work together?

These methods share a common goal – to meet customer, client and citizen needs in an efficient, cost-effective way. Both rely on the collection and analysis of data and both involve employees in identifying problems and creating solutions. Lean and service design are complementary, not interchangeable, and both are needed.

[Read more information on Lean](#) or email LeanBC@gov.bc.ca

Service Design and Policy

What is Policy?

Public Policy is:

- ▶ A course of action to achieve a desired objective or outcome
- ▶ Action taken by the government with the goal of benefiting the public interest.
- ▶ A way to translate public needs, demands, expectations and interests into effective and appropriate solutions
- ▶ About decisions of what government will or will not do
- ▶ So much more than a piece of paper!

Policy analysis is the systematic, comprehensive, unbiased investigation and evaluation of options to address an identified problem or issue. The process of analysis may end with an overview of the issue, and a presentation of options with a recommendation.

At all phases of the policy development cycle, it is critical that factual evidence be used as the basis for understanding, decision making and evaluating outcomes.

Another key component for all phases of policy development is engagement and consultation with internal and external stakeholders. Depending on the nature of the policy issue, consultation with other levels of government (eg. federal, municipal, First Nation) may also be required.

In general terms, there are five phases to policy development:

1. Identify the issue and define the desired objective or outcome
2. Complete research and analysis
3. Develop options and provide recommendations for action to achieve the desired objective or outcome
4. Implement the chosen option
5. Evaluate the impact on achieving the desired objective or outcome
6. Modify and adjust understanding and respect for the other points of view

Policy is responsive to the changing needs and situations of the province and British Columbians. When a program, service, or other government action requires updating, policy change is often needed to align and enable those innovations.

The final phase in the policy cycle is about gaining insight from the evaluation phase and making adjustments in response. It's also about using insights gained through one project to inform other projects. Adjusting and modifying allows for continuous policy improvement and innovation.

Policy must be implemented to have impact. Public policy results in programs and services that deliver every day benefits, from the social safety net to regulations protecting our province to programs that foster growth and prosperity.

How does Service Design work with Policy Making?

Service design assists policy making mostly in three ways:

- 1) **Service Innovation and Improvement**
Creating better programs and services that reflect the intent of policy.
- 2) **Policy Innovation**
Using design thinking tools and methods to inform and facilitate policy making.
- 3) **Service Transformation**
Using customer journeys and service architecture to help align the layers of the organization in order to deliver a particular service experience.

As a service designer, you are invaluable to these efforts, and so are policymakers learning and using service design fundamentals.

Service Innovation and Improvement

New policy should result in new or improved services. Service design increases the understanding of citizen and client needs, helps to identify opportunities, and provides opportunity to prototype concepts as they move from policy direction to programs.

Because of policy's impact on new services and improvements, incorporating policy expertise and service design within broader, multi-disciplined working groups will influence change. The level of this involvement varies based on the project; some may need very intensive policy consideration and involvement from policymakers, while others may simply be a check in.

Policy Innovation

As policy is often about understanding and changing behaviour, service design can help increase the impact and effectiveness of policy maker's work.

In response to the increasing complexity and connectedness of the world, policy making has new demands in taking different and improved approaches. In many jurisdictions, policy making is adopting design approaches to better inform insights and facilitate decision making. Field research, codesign, rapid idea generation, and prototyping are all useful additions to the policy toolbox.

A design approach to the practice of making policy can give policy makers more insights into how policy will be used on the front lines, as well as provide tools that allow the practice of making policy to be streamlined and flexible.

Collaborating with service designers, and adopting service design methods, creates a closer link between policy making, implementation and meeting the needs of citizens.

Service Transformation

When citizens access services, they are expecting their experience will be positive, accessible, seamless, and easy to navigate. In order to provide this level of service, significant changes are required from service providers today, and government is no exception. In response, government must transform how services are delivered.

Resources

[*UK Policy Lab*](#)

[*Applying Design Approaches to Policy Making, Kimbell \(PDF\)*](#)

[*Design for Policy, Bason \(book\)*](#)

[*Design for Policy, Bason \(presentation\)*](#)

Examples

- ▶ [Journey Map Example](#)
- ▶ [Persona Example](#)
- ▶ [Prototype Example](#)

Further Reading

[Service Design: From Insight to Implementation](#)

Andy Polaine, Lavrans Lovlie, and Ben Reason, [This Is Service Design Thinking](#)

Ed. Marc Stickdorn & Jakob Schneider, [Design for Public Good \(.pdf\)](#)

[The Design Council](#)

You may borrow many of these books from the [Strategic Design and Transformation](#)

Branch: UXBC@gov.bc.ca

References

[Service Design Network](#)

[UK Design Council](#)

McMullin, J., MacLennan, A., Bohn, D. & Neufeld, B. (2013) "Connecting Practice and Policymaking" in *Touchpoint: Designing Citizen-Centric Public Services* vol. 5 issue 2. *The Service Design Network*. Berlin.

Looking at the customer or client journey for future service experiences provides a key touchstone that allows stakeholders to collaborate. By using the journey as a reference, policymakers, designers, and others can ask "What would we need to do in order to deliver this complete service journey?"

Policy is fundamental in creating a complete system for delivering excellent services and a better citizen experience. By referencing the desired service journey, service designers, policy makers, and others can look at aligning policy and delivery.

Policy and Design Example

The B.C. Ministry of Justice and the Provincial Office of Domestic Violence used service design research to understand the underlying needs and the overall system of victims of family violence. Through field research, the cross-functional team created a new understanding and complexity of the process for protection orders. By using co-design workshops, the team explored new policy options which provided ways to improve domestic violence policy and support services throughout the province.

Service Design, User Experience Design (UX) and Internet Strategy

Service Design practices in the BC Public Service use many of the same methods as User Experience (UX) Design, but applies them beyond the web, across multiple touchpoints. Ministries and Central Agencies have completed Web Rationalization projects based on the [B.C. Government Internet Strategy](#) (2012). These projects are primarily focused on the web but reveal larger service opportunities.

Before undertaking a service design project, it's recommended to review your ministry or sector Internet strategy first. The ministry's Service Design or UX project team will benefit from having the big picture service design work in hand before tackling specific online products.

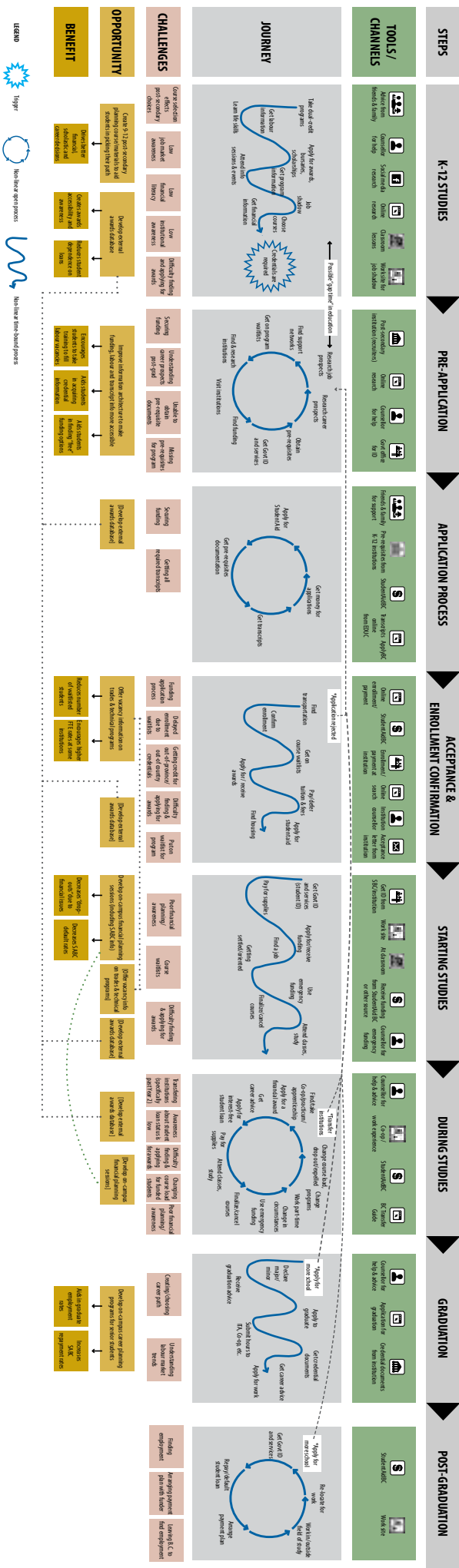
When a service design project is completed, visit [digital delivery services and tools](#) to help you address specific web components that may have risen out of this work.

Service Ecosystems—The Big Picture

Services do not exist in isolation—as teams work on elements of service architecture they will find a broader system that relates to the specific service. Some elements of the system may be within government, others in industry or non-governmental organizations, and still others within communities or with citizens and other stakeholders. Understanding this service ecosystem provides new opportunities for innovation, cost-savings and effectiveness.

Service design provides a systemic perspective of a service, as well as insights into effective points for change to improve service outcomes, lower delivery costs, and improve employee engagement and citizen experience.

APPENDIX C: TEMPLATES AND EXAMPLES



THE SERVICE DESIGN PLAYBOOK

APPENDICES

The Business Model Canvas

Designed for:

On: Day Month Year
 Iteration:

Designed by:

Key Partners



Who are our Key Partners?
 Who are our key suppliers?
 Which Key Resources are we acquiring from partners?
 Which Key Activities do partners perform?

KEY PARTNER BENEFITS:
 Acquisition of technology, intellectual property, distribution, and activities
 Acquisition of valuable resources and activities

Key Activities



What Key Activities do our Value Propositions require?
 Our Distribution Channels?
 Customer Relationships?
 Revenue streams?

COMPETITIVE ADVANTAGE:
 Production
 Distribution
 Channels
 Partners/Networks

Value Propositions



What value do we deliver to the customer?
 Which one of our customer's problems are we helping to solve?
 Which bundles of products and services are we offering to each Customer Segment?
 Which customer needs are we satisfying?

VALUE PROPOSITIONS:
 Newness
 Performance
 Customization
 Convenience
 Design
 Price/Quality
 Risk Reduction
 Accessibility
 Compatibility
 Convenience/Usability

Customer Relationships



What type of relationship does each of our Customer Segments expect us to establish and maintain with them?
 Which ones have we established?
 How are they integrated with the rest of our business model?
 How costly are they?

RELATIONSHIP MODELS:
 Personal assistance
 Self-service
 Automated personal assistance
 Community
 Co-creation

Customer Segments



For whom are we creating value?
 Who are our most important customers?

MARKET SEGMENTS:
 Mass Market
 Segment of Mass
 Niche Market
 Multisided Platform

Key Resources



What Key Resources do our Value Propositions require?
 Our Distribution Channels?
 Customer Relationships?
 Revenue Streams?

KEY RESOURCES:
 Physical
 Intellectual
 Financial
 Human
 Social

Channels



Through which Channels do our Customer Segments want to be reached?
 How are we reaching them now?
 How are our Channels integrated?
 Which ones work best?
 Which ones are most cost-efficient?
 How are we integrating them with customer routines?

CHANNEL TYPES:
 1. Direct sales
 2. Retail
 3. Partners
 4. Multi-channel
 5. Self-service
 6. Multi-channel
 7. Multi-channel
 8. Multi-channel
 9. Multi-channel
 10. Multi-channel

Cost Structure

What are the most important costs inherent in our business model?
 Which Key Resources are most expensive?
 Which Key Activities are most expensive?

COST STRUCTURE MODELS:
 Cost driven (lowest cost structure, low price value proposition, customer substitution, competitive advantage)
 Price driven (highest price value proposition, customer substitution, competitive advantage)
 Price driven (highest price value proposition, customer substitution, competitive advantage)
 Price driven (highest price value proposition, customer substitution, competitive advantage)

Revenue Streams

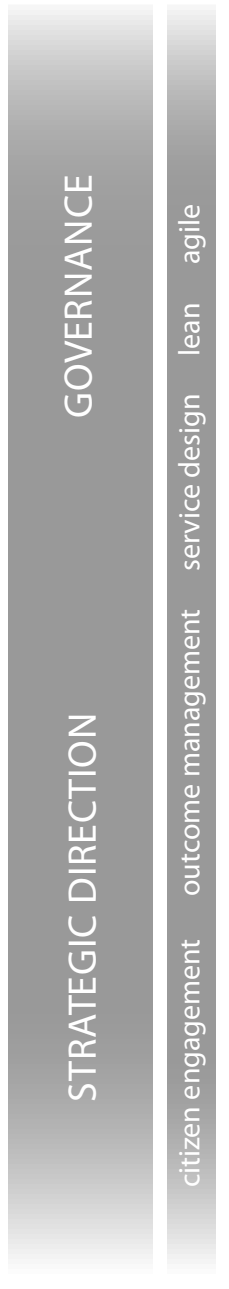
For what value are our customers really willing to pay?
 For what do they currently pay?
 How are they currently paying?
 How would they prefer to pay?
 How much does each Revenue Stream contribute to overall revenues?

REVENUE STREAMS:
 Transactional
 Subscription
 Usage-based
 Advertising
 Commission
 Royalty
 License
 Rental
 Leasing
 Resale
 Brokerage
 Intermediation
 Asset Management
 Insurance
 Investment Management
 Fundraising
 Crowdfunding
 Donations
 Grants
 Sponsorships
 Advertising
 Affiliate Marketing
 Referral Fees
 Freemium
 Pay-what-you-want
 Pay-what-you-can
 Pay-what-you-wish
 Pay-what-you-feel
 Pay-what-you-think
 Pay-what-you-value
 Pay-what-you-want-to-pay
 Pay-what-you-can-afford
 Pay-what-you-wish-to-pay
 Pay-what-you-feel-is-fair
 Pay-what-you-think-is-right
 Pay-what-you-value
 Pay-what-you-want-to-pay
 Pay-what-you-can-afford
 Pay-what-you-wish-to-pay
 Pay-what-you-feel-is-fair
 Pay-what-you-think-is-right
 Pay-what-you-value

Citizen-centric Service Architecture



CITIZENS' NEEDS AND EXPECTATIONS



GOVERNMENT DECISIONS AND ACTIONS

DriveBC Journey Map

Final version 1 April 2013

Opportunities

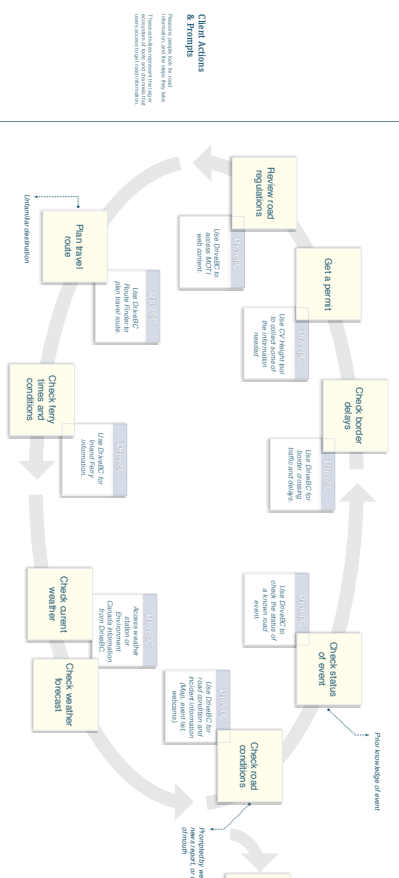
1. Improve the DriveBC map interface
2. Personalise navigation
3. Improve navigation and layout
4. User specific navigation
5. Add changing roadcheck, water



Pre-Trip Planning & Research

Tools: 1. Research your destination and research transportation

Tools: Computer, TV, Smartphone, Tablet, GPS, Camera, Weather, Other, Orientation, Social Networks, Solutions

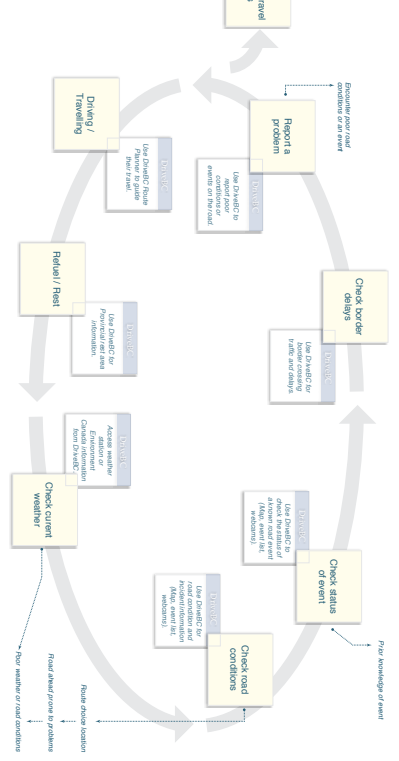


Thinking & Feeling

<p>Thinking & Feeling</p> <p>1. I feel more confident about my ability to use DriveBC to plan my trip.</p> <p>2. I feel more confident about my ability to use DriveBC to check road conditions.</p> <p>3. I feel more confident about my ability to use DriveBC to check weather.</p> <p>4. I feel more confident about my ability to use DriveBC to check border delays.</p> <p>5. I feel more confident about my ability to use DriveBC to check event status.</p>	<p>DriveBC is the primary source of information for all steps.</p> <p>1. I feel more confident about my ability to use DriveBC to plan my trip.</p> <p>2. I feel more confident about my ability to use DriveBC to check road conditions.</p> <p>3. I feel more confident about my ability to use DriveBC to check weather.</p> <p>4. I feel more confident about my ability to use DriveBC to check border delays.</p> <p>5. I feel more confident about my ability to use DriveBC to check event status.</p>	<p>1. I feel more confident about my ability to use DriveBC to plan my trip.</p> <p>2. I feel more confident about my ability to use DriveBC to check road conditions.</p> <p>3. I feel more confident about my ability to use DriveBC to check weather.</p> <p>4. I feel more confident about my ability to use DriveBC to check border delays.</p> <p>5. I feel more confident about my ability to use DriveBC to check event status.</p>	<p>1. I feel more confident about my ability to use DriveBC to plan my trip.</p> <p>2. I feel more confident about my ability to use DriveBC to check road conditions.</p> <p>3. I feel more confident about my ability to use DriveBC to check weather.</p> <p>4. I feel more confident about my ability to use DriveBC to check border delays.</p> <p>5. I feel more confident about my ability to use DriveBC to check event status.</p>	<p>1. I feel more confident about my ability to use DriveBC to plan my trip.</p> <p>2. I feel more confident about my ability to use DriveBC to check road conditions.</p> <p>3. I feel more confident about my ability to use DriveBC to check weather.</p> <p>4. I feel more confident about my ability to use DriveBC to check border delays.</p> <p>5. I feel more confident about my ability to use DriveBC to check event status.</p>	<p>1. I feel more confident about my ability to use DriveBC to plan my trip.</p> <p>2. I feel more confident about my ability to use DriveBC to check road conditions.</p> <p>3. I feel more confident about my ability to use DriveBC to check weather.</p> <p>4. I feel more confident about my ability to use DriveBC to check border delays.</p> <p>5. I feel more confident about my ability to use DriveBC to check event status.</p>
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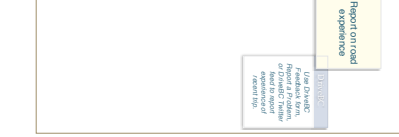
During Trip

Tools: Smartphone, Tablet, GPS, Camera, Weather, Other, Orientation, Social Networks, Solutions



Post-Trip

Tools: Smartphone, Tablet, GPS, Camera, Weather, Other, Orientation, Social Networks, Solutions



THE SERVICE DESIGN PLAYBOOK

APPENDICES

Opportunities Ranking Results

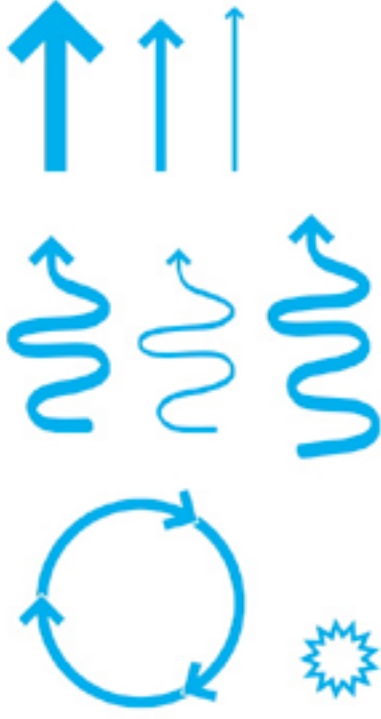
	User Desirability			Technical Feasibility			Business Viability				TOTALS	
	Increase Simplicity of Navigation	Aligns with Industry Common Approaches	Increases Meaning of Data	Targets Specific Personas	Does Quality Data Exist to Build on?	Aligns with Open 511	Technically Feasible	Addresses User Dissatisfaction	Focuses on Relevant Information	Aligns with Executive Expectations		Aligns with Ministry Goals
1. User Customization	5	3	5	5	5	1	3	3	5	1	3	39
2. Persona Based Navigation	5	3	3	5	5	1	5	3	5	3	3	41
3. Tool	1	3	1	3	3	3	3	5	5	3	1	31
4. Increase Social Media Presence	1	3	1	3	3	1	5	3	3	1	1	25
5. Mobile App	3	3	1	1	3	1	1	1	3	1	1	19
6. Improved Navigation/ Layout	5	5	5	3	5	1	5	5	5	5	5	49
7. Locale Specific Navigation	5	5	5	3	1	3	3	5	5	3	5	43
8. Voice Dictation System	1	1	1	3	3	1	1	1	1	1	1	15
15. Improve Map Interface	5	5	5	3	5	1	3	5	5	3	3	43

* Priority Alignment Scale: 1 = Low, 3 = Medium, 5 = high



Copy and Paste Visual Components for Journey Mapping

Activity Patterns for Doing



Channel Icons to Annotate Activity Patterns



Graph Elements for Stress Levels



KEY INSIGHTS

1. Include key principles and insights from discovery research to frame context for journey.

2.

3.

4.

5.

6.

CLIENT JOURNEY

STAGE	[First Stage]	[Second Stage]	[Third Stage]	[Fourth Stage]	[Fifth Stage]	[Sixth Stage]	[Seventh Stage]
ORG	What are the key organizational activities or services in this point?						
DOING	Visualize the actions and changes in use during this stage. When a client performs, use the implied actions or provide your own to show typical behavior and new patterns in the service experience. This may show alternative, parallel action paths. Use Numbered Lists and preferred to show preference or relative volume in parallel paths. Use the diagram to show typical or preferred behavior for specific actions. Label the diagram with the specific action or goal (e.g. "Share Social Media, Business Service Selection, Check Website Size, Visualize About"). This may require context or divide activity blocks to reflect across time (e.g. "Check in this block covering steps 1 and 2")						
THINKING	What are clients thinking at the point? What are their questions, assumptions?						
FEELING	What are clients or agents feeling at this point? What emotions do they experience?						
METRICS	Include measures and metrics that are relevant to this journey stage.						
WHAT THEY SAY	Include quotes from user research that are relevant to this stage of the journey.	Set in italics and use a serif font, such as Cambria					
TYPICAL STRESS LEVEL	<p>Graph typical stress level high vs. low. Base on research, either inferred or directly asked. (Delete this guidance note).</p>						
DEFINING MOMENTS	Outline the key moment(s) that make or break the service experience at this point in the journey. Note that some stages may have several, while others may have none.						
OPPORTUNITIES							

Opportunity Name
 Multiple words separated by a space should consider space in the journey insight.



Need	Challenge Statement(s)	Opportunity	Impact	Effort	Risk of Implementing Opportunity	Risk of Not Implementing Opportunity	Outcome associated with the opportunity (ie. it back to the "why" why is it compelling? Why does it matter so much?)	Hours	Resources	Barriers	Prototype?
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Need	Challenge Statement(s)	Opportunity	Impact	Effort	Risk of Implementing Opportunity	Risk of Not Implementing Opportunity	Outcome associated with the opportunity (ie. it back to the "why" why is it compelling? Why does it matter so much?)	Hours	Resources	Barriers	Prototype?
<p>EXAMPLE: Parents with special needs children need shorter waitlists and timelier access to programs and services.</p> <p>How can gov't assist in making waitlists shorter?</p> <p>Develop provincial standard statement of what's parent can expect from a CDC (funding implications) High Impact High Effort</p>											

Need	Challenge Statement(s)	Opportunity	Impact/Effort	Risk of action/fracton (high/medium/low)	Outcome associated with the opportunity (ie. it back to the "why" why is it compelling? Why does it matter so much?)	Hours	Resources	Barriers	Prototype?
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Government Communications and Public Engagement (GCPE)

and

Ministry of **<name>**

Partnership Agreement

Project # 18-nnn

Project Name

Version# 0.1

Month, dd, yyyy

Contents

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1 INTRODUCTION

1.1 What is the Partnership Agreement?

This partnership agreement describes the joint commitment of Government Communication and Public Engagement (GCPE), Government Digital Experience (GDX) and the <client/ministry/organization> to deliver the <what> Project (the Project). It outlines the project scope, deliverables, roles and responsibilities, timelines, and costs.

Signing of this partnership agreement indicates initiation of the project and that both parties agree to fulfill the responsibilities outlined in this document.

This partnership agreement is valid after being jointly accepted by both ministries. Resources and schedule will be confirmed once the partnership agreement has been signed by both parties.

1.2 Project Background

Part 1 – About the Organization and where it is today; Part 2 Government’s Internet Strategy and the new thinking around web, content and services; Part 3 – leveraging enterprise technologies

1.3 Business Objectives

The business objectives of the project are to:

- Advance the <organization> service delivery goals in alignment with the <organizations> Service Plan/Internet Strategy/Transformation and Technology Plan, etc;
- Support the implementation of a new web presence aligned with ... and gov.bc.ca;
- Improve mutual understanding and cooperation
- Establish business priorities and outline a plan to ensure that
- Etc

2 APPROACH

2.1 Workplan

PHASE	PURPOSE	TYPICAL METHODS ¹	OUTPUTS
Discovery	<ul style="list-style-type: none"> Understand the current state of service delivery. Learn enough about the service, users and stakeholders to inform content and design. Review work-in-progress to determine approach to user testing. 	<ul style="list-style-type: none"> Review existing documentation, work products, briefing with CRT team Intercepts, interviews with staff and stakeholders 	Research Plan
Prototype	<ul style="list-style-type: none"> Test existing solutions with real users in context. Understand alignment of the proposed solution with user needs Measure effectiveness and record results Refine design and retest enhancements 	<ul style="list-style-type: none"> Prototype Workshop with internal stakeholders Recruitment of testing cohort Design, development of service prototype(s) Deployment, testing, reporting Journaling by users and staff 	Prototype(s) Findings Report, Recommendations
Targeted Information Development (depending on resource availability)	<ul style="list-style-type: none"> Working with CRT team, update content structure Draft “plain language” content to explain rights & responsibilities of disputants to users Revise based on ongoing review with legal & policy experts 	<ul style="list-style-type: none"> Workshop with internal stakeholders 	Structured content

2.2 **GDx, Organization**> Team Responsibilities

- **Project Management:** manage the Organization’s commitments, resources, dependencies, issues and risks
- **Provide access:** to business experts, program staff, subject matter experts
- **Add as required**

2.3 **<Client >** Team Responsibilities

- **Add as required**

2.4 Assumptions & Dependencies

- **Note: Remove if no contracted resources:** This partnership agreement assumes that GCPE has the authority to procure contracted resources for certain roles. This is typically facilitated by the GCPE Strategic Resource Initiative.
- Consensus on deliverables including discussion of potential impacts to schedule and scope will be reached and documented during design review sessions. Agreed changes that will impact schedule, scope and /or budget will be managed through the change management process, as required.
- The project will be as transparent as possible to the public service in order to use it as a learning and engagement opportunity for other ministries.
- **Add application/service assumptions and dependencies if applicable**

3 SCHEDULE & BUDGET

Significant changes to deliverables, roles or timelines will be managed with a change request to ensure that both the **<Insert Client>** and GDx project teams are in agreement.

Preliminary dates for this project are outlined below. Because this is a proof of concept for new methods, more accurate scheduling may only be possible once the specific prototyping opportunities are defined.

3.1 Timelines and Milestones

Anticipated Project Timelines and Milestones	Target Date
Project Start	15-Apr-14

Discovery Phase Complete	15-Jun-14
Prototype & Test Phase Complete	15-Jul-14
<Add as required>	
Project Completion	15-Sept-14

3.2 Project budget

Deliverables & Expenses for this project	Anticipated Scheduled start	Anticipated Schedule Completion	Cost
Research Plan:	15-Apr-14	15-Apr-14	\$NNN,NNN.00
Prototype (s)			
Findings Report, Recommendations			
Structured content Developed			
Final Report			
Project Management – staff (10%)			
Expenses: Travel			
Expenses: License/Hosting Fees			
Expenses: Other			
Total Fiscal 17/18			

Project costs will be billed based on deliverable completion or at the end of each quarter.

<Note if project crosses fiscal table needs to clearly identify fiscal split>

4 APPROVALS & CODING

4.1 Partnership Agreement Approval

Approved by: _____ **Date** _____

Organization	Firstname Lastname
Executive	Title
Sponsor	Organization
	Ministry

Approved by: _____ **Date** _____

GCPE	<Insert Signing Authority Name>
Executive	Insert Signing Authority Title>
Sponsor	Government Digital Experience (GDx) Government Communications and Public Engagement

4.2 Project Coding

Client Contact for Billing	Name					
	Title					
	Phone Number					
	Email					
Journal Voucher Coding	Name of Program/Service Line	Client	Responsibility Centre	Service Line	STOB	Project



RESEARCH CAPTURE

PERSONAS

NAME:

ROLE:

DEMOGRAPHIC:



BACKGROUND

SCENARIOS
(thinking/feeling/doing)

.....
.....
.....
.....
.....



LEVEL OF COMFORT

computer
telephone
face to face
transaction
information
relationship

SHORT TERM GOALS

.....
.....
.....
.....

LONG TERM GOALS

.....
.....
.....
.....

[Ministry/Program Area Name]

Service Design Project

RESEARCH PLAN

[DATE]

[Insert Version XX Draft]

[Insert project team members]

Research Plan Summary

The project core team will perform research in support of the [insert project name] following best practices for strategic service design research provided by Government Communications and Public Engagement (GCPE) and the Service Design Playbook. This document summarizes that plan and details the project goals, research review, participants, approach, logistics, as well as how the team will share findings and next steps in the project.

Research Goals	<ul style="list-style-type: none"> • [insert list of goals] <p>For example:</p> <ul style="list-style-type: none"> • <i>Understand the current state</i> • <i>Review existing internal process to determine approach to user testing</i> • <i>Understand behaviours, needs, and motivations of key user groups e.g. parents, service providers</i> • <i>Identify metrics to measure success</i>
Research Review	<ul style="list-style-type: none"> • [insert list of items to be reviewed] <p>For example:</p> <ul style="list-style-type: none"> • <i>Previous project research</i> • <i>Processes</i> • <i>Tools</i> • <i>Metrics/analytics (eligibility tool, forms failure rate, help line data, subsidy forms website metrics)</i> • <i>Regulations, policy, legislation</i> • <i>Jurisdictional reviews of child care subsidy across provinces/Canada</i> • <i>Other ministries</i>
Research Participants	<p>Internal:</p> <ul style="list-style-type: none"> • [insert list of internal stakeholders] <p>External:</p> <ul style="list-style-type: none"> • [insert list of external stakeholders]

Research Approach	<ul style="list-style-type: none">• [insert list of approaches] <p><i>For Example:</i></p> <ul style="list-style-type: none">• <i>High Level Content Inventory</i>• <i>Individual interviews</i>• <i>Usability testing</i>• <i>Workshops</i>• <i>Site Visits/staff interviews</i>• <i>Review</i>
Research Dates and Locations	<ul style="list-style-type: none">• Date and Location Chart• Research subjects
Recruitment	<ul style="list-style-type: none">• Recruitment details• Resources
Next Steps	<ul style="list-style-type: none">• [insert list next steps/phases of work for project]

Research Goals

[insert high level overview of background, along with a description of the research goals of project, behaviours, recent research, current state/processes and metrics]

Research goals are to identify and understand:

For Example:

- *The current state of [XX], focusing specifically on [XX]*
- *Behaviours, needs, and motivations of key user groups*
- *Work-in-progress to determine approach to user testing*
- *Metrics to measure success*

Research Review

The Service Design Team will review artifacts provided by [insert Ministry name] such as service plans, annual reviews, analytics, surveys, reports, and other relevant documents that would inform the research.

Specifically, the core team has reviewed the following in preparation for the research phase:

- [insert list of artifacts that the core team has reviewed]

For example:

- *XX Project Research*
- *XX Forms & Process*
- *Metrics/analytics (eligibility tool, forms failure rate, help line data, subsidy forms website metrics)*
- *Regulations, policy, legislation*

Research Participants

The Core Team will interview both internal and external research participants for this project.

Internal Research Participants

Internal research participants will be determined through discussion with the core team members, and will include a range of participants in the following areas:

- [insert list of internal research participants]

External Research Participants

External research participants will be determined through discussion with the core team, internal interviews, and will include a range of participants in the following areas:

- [insert list of external research participants]

Participants Attributes

Participant attributes to consider that will be used for recruitment purposes are as follows:

- [insert list of participant attributes]

For Example:

- *Low income*
- *Low literacy*
- *ESL or non-English speaking clients*
- *Employed single mother*
- *Vulnerable clients*

Research Approach

[insert an explanation of the research approach that will be conducted]

For example:

A variety of service design research methods have been chosen in order to gather data about the different kinds of [insert list of audience types], and other stakeholders who use and support the [insert name of service/program]. There are many design research methods available to the team and used throughout government, ranging from investigating what people say to what people do, and from qualitative/insights-based methods to

[Project Name] - Research Plan

6

quantitative/validation-based methods. The project has selected methods from across the spectrum to derive observations in a complicated and complex decision-making environment.

Methods chosen for this project include:

- [insert list of methods]

For example:

- *High Level Content Inventory*
- *Individual interviews*
- *Usability testing*
- *Workshops*
- *Site Visits/staff interviews*
- *Review (primary document research)*

These methods will be deployed across stakeholders, both internal to government and external.

Internal Research:

[insert an explanation about the internal research approach that will be conducted and how that study will inform the external research]

For Example:

Starting with internal research, we will conduct individual interviews with [insert service/program] staff. The research derived from the internal interviews will form the basis for the research and usability testing approach with external participants. Within the core team, we will meet to discuss stakeholders and work towards a final external participant list.

External Research:

[insert explanation about the external research component]

For example:

For the external research component of the project, our research will focus on [insert list of external audience types].

The core team will conduct interviews with [insert list of external audience types]. The team will also perform usability testing on the [insert service/program] with [insert external audience type] to better understand what the key challenges are for [insert external audience type] who are going through this process.

Recruitment

The Core Team will participate in recruitment efforts as needed. Many of the participants will be accessible through [insert Ministry name] working relationships and we will ask those stakeholders for help finding participants that suit the criteria for the research.

[insert Ministry name] team members will make initial contact with stakeholders/participants to inform them of the project and how they can participate in our research. One of the core team members will contact participants to book a final time for interviews/usability testing. A research calendar will then be established to determine who the team will be interviewing, locations, and interview format and structure.

Resources

The Core Team, which includes [insert names of team members], will be required to assist with recruiting participants, conducting the research, and analyzing the findings for this project.

Research Dates and Location

The Core Team has decided to travel to the following locations on the following dates to conduct research with external participants. The locations were chosen after careful consideration post-discovery interviews and workshops and on suggestion of the discovery interview and workshop participants.

Research Dates	XX	XX	XX	XX	(date)	(date)	(date)	(date)
Location	Victoria							

For Example:

- *Small communities and urban centres*
- *Communities impacted by transient work force (seasonal changes) or crazy weather, places where Internet is spotty, etc.*
- *First Nations communities*
- *In remote/rural areas*

Next Steps

Following the presentation of our research findings to the project steering committee, the core team will explore the opportunity for enhancements, and recommendations for improvements, to the [insert project topic] through the following approaches:

- [list next steps/phases of work for project]

For Example:

- *Opportunity Workshop(s)*
- *Prototype enhancements with users*
- *Recommendations report*

Key Insights

Most people don't want to get to the point of dispute resolution. They would rather not have a problem at all. Prevention matters.

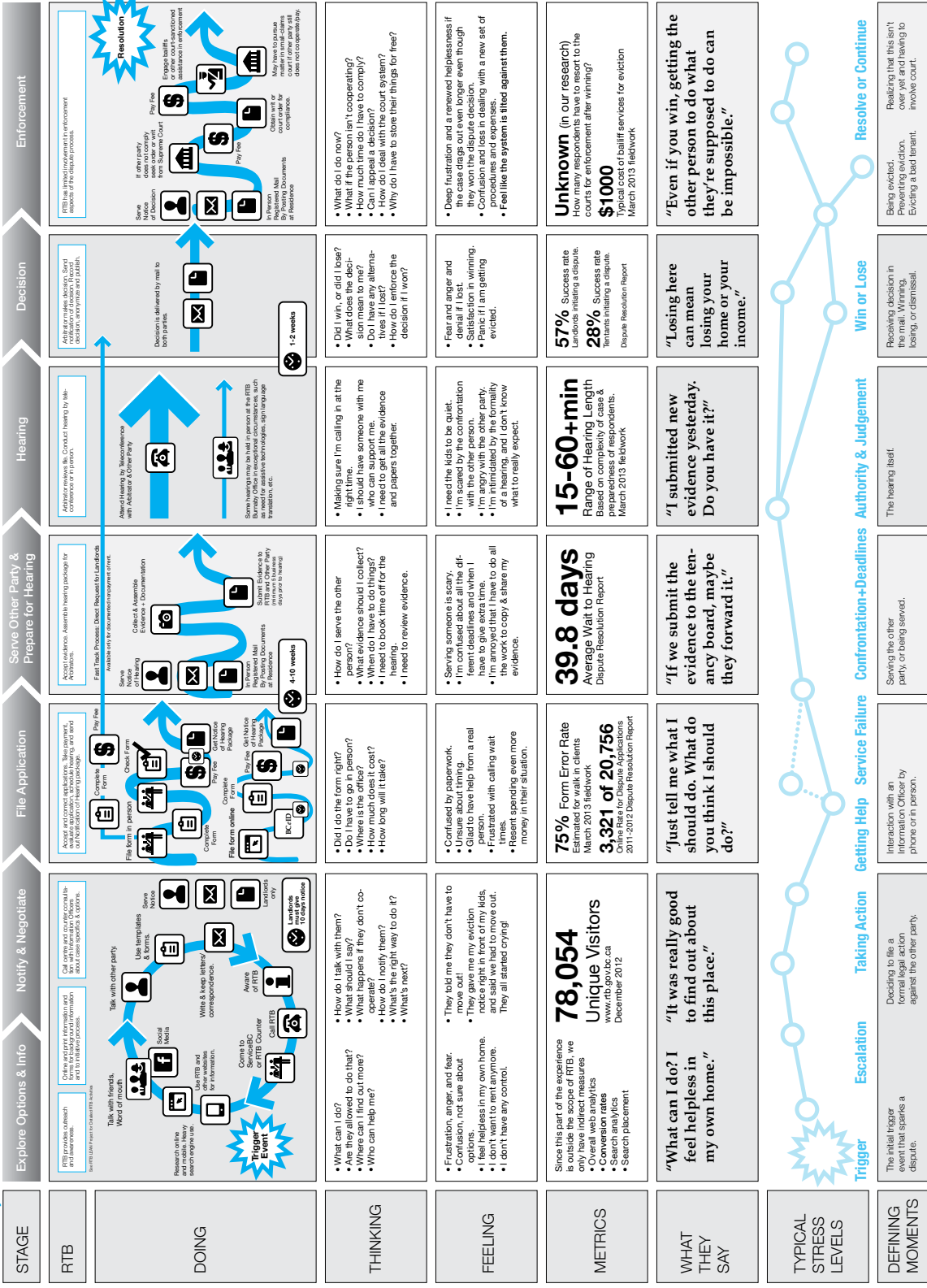
The best self-service gives people the tools to resolve their disputes on their own, without formal legal processes or paperwork.

It's a holistic, end-to-end system, from trigger to full resolution. What can be decided on specific actions within that system. Big picture first.

People need to orient themselves to the overall system before they can decide on specific actions within that system. Big picture first.

Use progressive disclosure to manage content and the overall service experience. Start with self serve information and processes, while providing cross-channel backup for those that need it, when they need it.

Client Journey



Opportunities

REDUCTION IN OVERALL DISPUTES

Create and promote DIY resolution tools and information.

Stages: Explore Options & Info, Notify & Negotiate

PHYSICAL WAYFINDING

Direct callers and counter visitors to self-resolution information in IVR, Info Desk, and Forms bank.

Stages: Explore Options, Notify & Negotiate, File

CHECKING STATUS

Explore options to check status of case via web or IVR.

Stages: Prepare, Hearing, Decision

DELEGATION

Work to delegate, train, and empower ServiceBC agents to act independently.

Stages: All

VISUALIZATION

Consider using infographics or diagrams to explain and introduce process & phases.

Stages: All

Start or End Point



Non-Linear Open Process



Non-Linear Time-Bound Process



Linear Process



Linear Process



Linear Process



Linear Process



Linear Process



Linear Process



Linear Process



Linear Process



Linear Process



Linear Process



Linear Process



Linear Process



Linear Process



CLIENT JOURNEY

STAGE	[First Stage]	[Second Stage]	[Third Stage]	[Fourth Stage]	[Fifth Stage]	[Sixth Stage]	[Seventh Stage]	[Eighth Stage]
Activities	<ul style="list-style-type: none"> What are the specific activities of this stage? How are they related to a previous activity? 							
Service Evidence	<ul style="list-style-type: none"> What is the physical evidence that a service is being provided? How is it perceived by the customer? 							

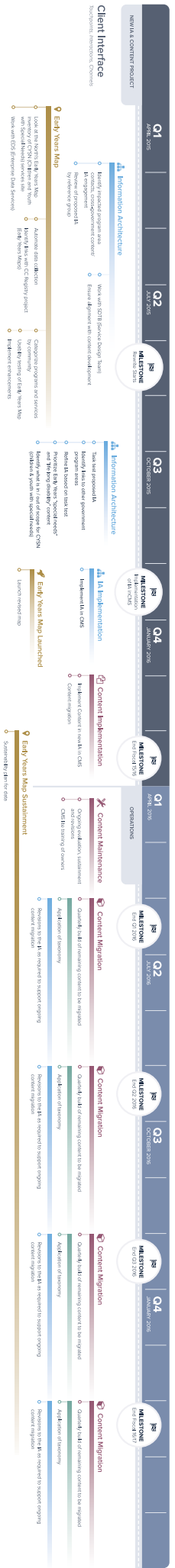
STAFF ACTIONS

Frontline Staff Actions	<ul style="list-style-type: none"> What are the actions that frontline staff need to take to deliver the service? 							
Support Actions	<ul style="list-style-type: none"> What are the actions that support the frontline staff? How are they delivered? 							

SERVICE FOUNDATIONS

Policy & Regulation	<ul style="list-style-type: none"> What are the policies and regulations that govern the service? 							
Technical Capability	<ul style="list-style-type: none"> What are the technical capabilities required for the service? 							
Facilities & Infrastructure	<ul style="list-style-type: none"> What facilities and infrastructure are needed for the service? 							
Staffing & Org Structure	<ul style="list-style-type: none"> What are the roles and responsibilities of the staff? How are they organized? 							





Client Interface

- Information Architecture
 - Review and update IA
 - Review and update IA
 - Review and update IA
- IA Implementation
 - Finalize IA
 - Finalize IA
 - Finalize IA
- Content Implementation
 - Finalize Content
 - Finalize Content
 - Finalize Content
- Early Years Map Lunched
 - Finalize Early Years Map
 - Finalize Early Years Map
 - Finalize Early Years Map

Internal Operations

- Content Strategy
 - Content Strategy
 - Content Strategy
 - Content Strategy
- Autonomy & Metadata
 - Autonomy & Metadata
 - Autonomy & Metadata
 - Autonomy & Metadata
- Autonomy Testing
 - Autonomy Testing
 - Autonomy Testing
 - Autonomy Testing
- Autonomy Implementation
 - Autonomy Implementation
 - Autonomy Implementation
 - Autonomy Implementation

Policy and Strategy

- Measurement & Evaluation
 - Measurement & Evaluation
 - Measurement & Evaluation
 - Measurement & Evaluation
- Content
 - Content
 - Content
 - Content

Organizational Structure

- Project Governance
 - Project Governance
 - Project Governance
 - Project Governance
- Content Strategy
 - Content Strategy
 - Content Strategy
 - Content Strategy
- Information Architecture
 - Information Architecture
 - Information Architecture
 - Information Architecture



Content Writing

- Content Writing
 - Content Writing
 - Content Writing
 - Content Writing
- Content Maintenance
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Measurement & Evaluation

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 - Measurement & Evaluation

Content Maintenance

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- Measurement & Evaluation
 - Measurement & Evaluation
 - Measurement & Evaluation
 - Measurement & Evaluation



Project Name | [Service Name] | Roadmap

v. 1.0 | MMM, DD, YYYY

	NOW	SOON	LATER	LONG TERM
--	-----	------	-------	-----------

INTERFACE, OPERATIONS, PROCESS, and STAFFING

• What are the needs to build, launch, and sustain? (Identify personnel and processes, and address any dependencies)

CAPABILITY

POLICY & LEGISLATION

• What are the policy, regulatory, or legislative changes needed to enable this service?

ENABLERS

INFRASTRUCTURE, FACILITIES, and TECHNOLOGY

• What are the equipment, tools, or technology needs of this service?

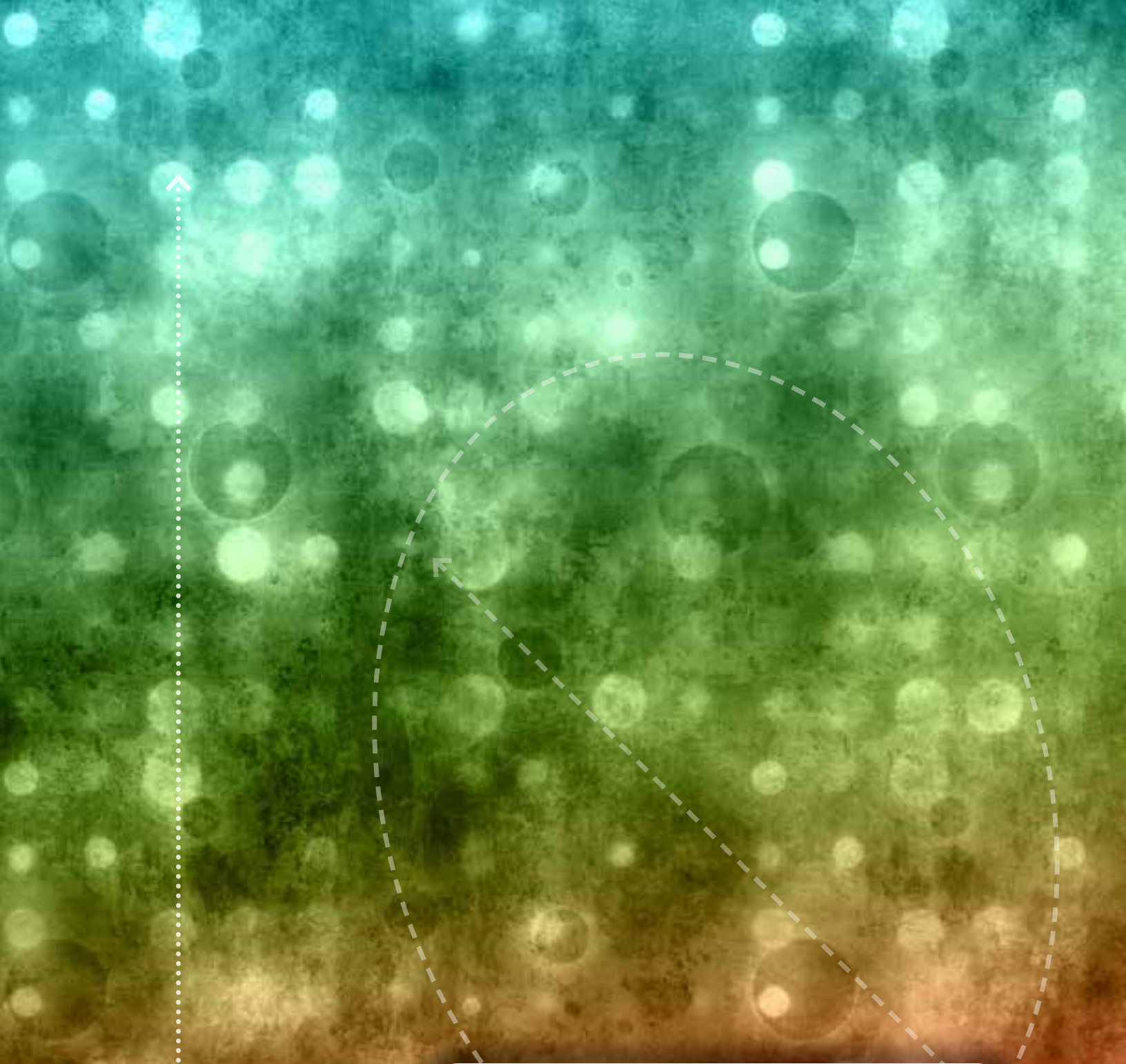
ENABLERS

VALUE

• How do you create value for customers, citizens, and other stakeholders?
• What is the value provided by this roadmap?

OUTCOMES





THE **SERVICE DESIGN** PLAYBOOK

