

Service Design in Sales

Mental models and parallels between service design and sales



Content

Introduction

4 Ideas

Activities

Takeaways

Questions



Introduction

Greg Grabowy

Started my career as a designer, 20 years ago in NYC—have been practicing service design for 5 years and have accreditation as a service design trainer from Service Design Network.

Reason for this session: I love the service design community in NYC and wanted to share a perspective of purposeful practice.



An enterprise software company focused on digital workflow, case management and process automation. I work here as a solution consultant on an innovation team within the sales organization—going out to the field to work with customers.

(Our legal department says I can't talk about our roadmap.)



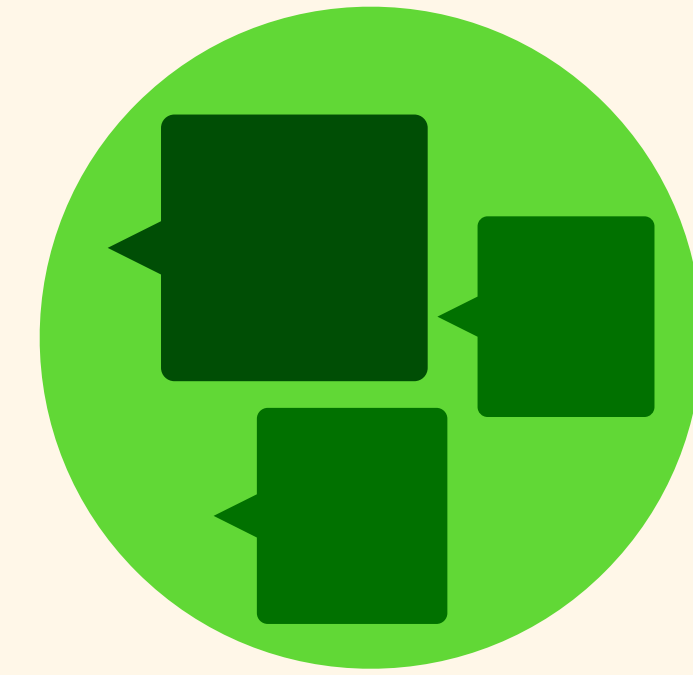
Why Service Design?



Change



Distractions



Assumptions



How Did I Learn Service Design?



Mentors
(2nd Hand)

Examples of Bravery



Reading
(3rd Hand)

Theory Reinforcement



Practice
(1st Hand)

You Being Brave



4 Ideas

**Knowing
Your Customer**

**Starting With the
Relationships**

**Meaningful Participation
From Your Customer**

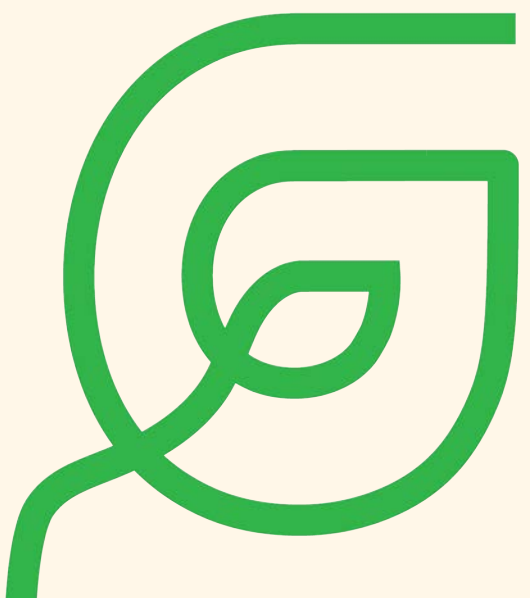
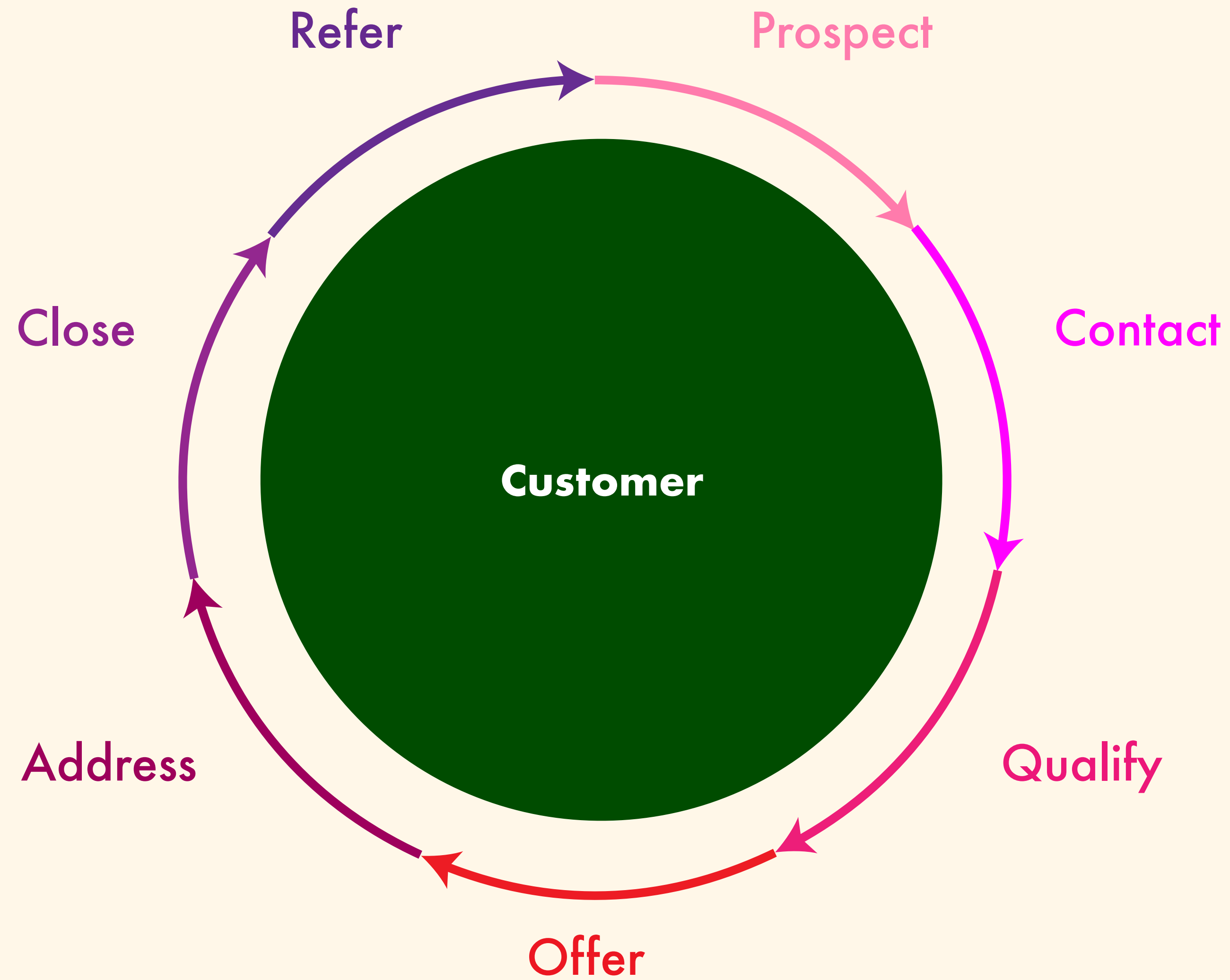
**Realizations
VS Concessions**



**KNOWING YOUR CUSTOMER
IS THE MOST VALUABLE
THING YOU CAN DO
AS A BUSINESS**

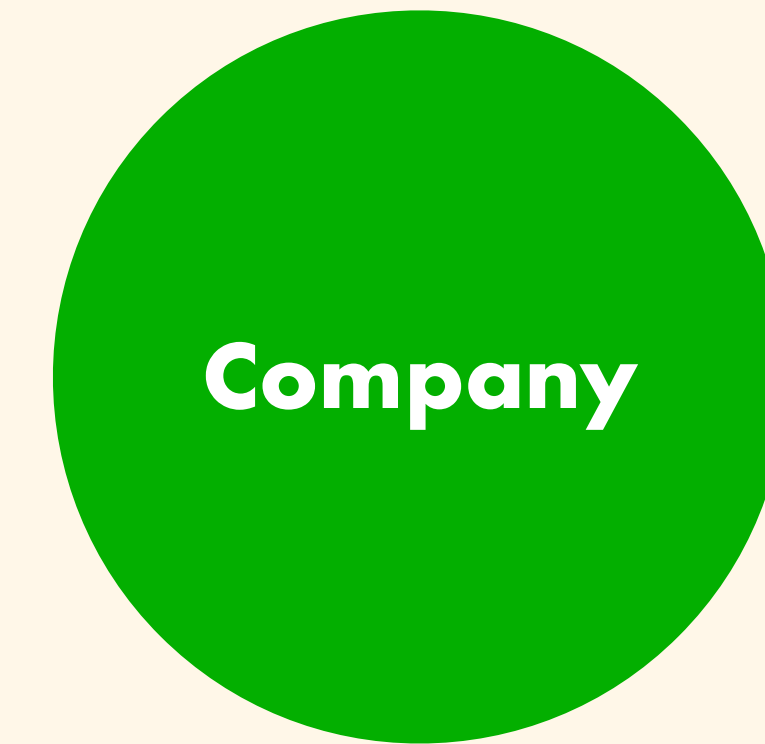
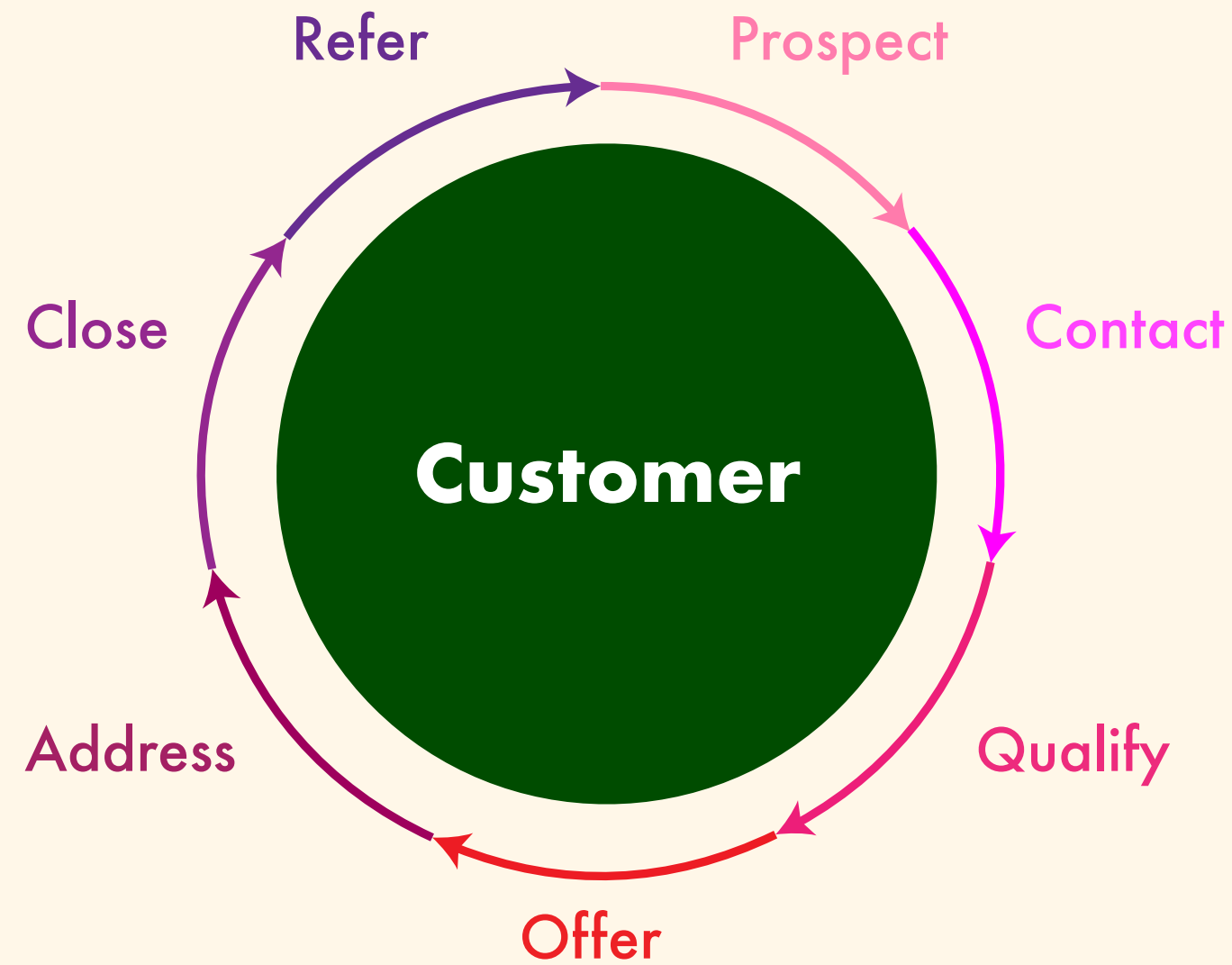


The Sales Cycle



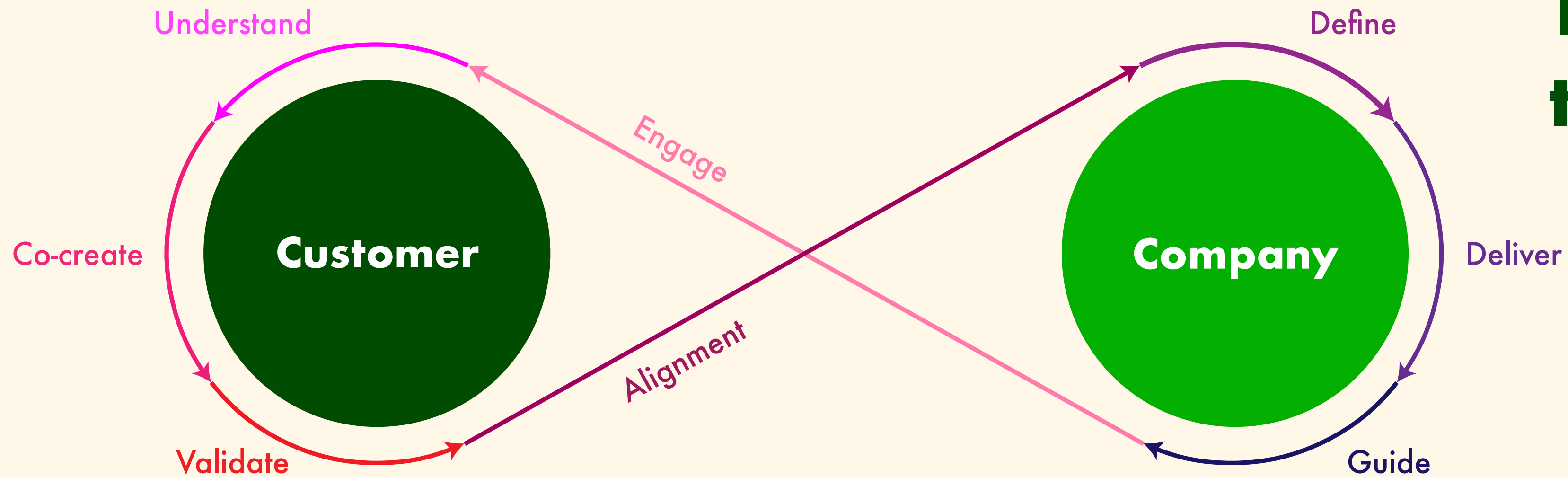
Knowing Your Customer

The Sales Cycle



**Goal:
Making
More
Valuable
Things
to Sell**

Service Design Cycle in Sale

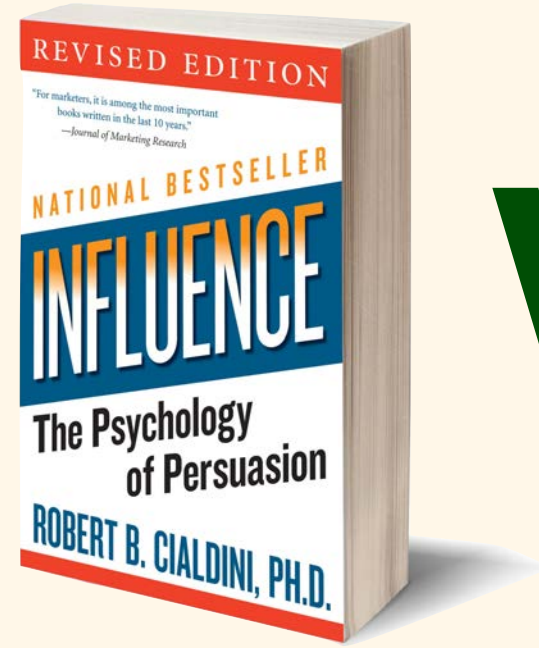


	SUNDAY	15	MONDAY	16	TUESDAY	17	WEDNESDAY	18	THURSDAY	19	FRIDAY	20	SATURDAY
								NOTE PAD					
												CALL TRACKER	
Architect MON-Wed	Joe/Arthur All weeks → THURSDAY	GREG ALL WEEK	Neal 26-27	22	Solution Review NOTE PAD	23	24	AGENTS START USING NOTE PAD CURRENT STATE	25	26	27		
Architect Tue-Wed	sush Tue-Thur 1-3	SREE B. ALL WEEK	Neal 3-4			30	MAY	1	2	3	4		
			Jones Tue-Thu										
MARK S. ALL WEEK				6		7	KNOWLEDGE	8	9	10	11		
Architect Wed-Thu	Joe/Arthur All week	SREE B. ALL WEEK	Jones Neal 14, 16			14	15	16	17	18			
Architect Tue-Thu	Darrin All weeks	GREG ALL WEEK	Jones Neal 21, 23, 24			21	22	23	24	25			
Architect Wed-Thu	Joe/Arthur Tue-Thur		Neal 30		MEMORIAL DAY	28	29	30	31	JUNE	1		
MARK S. ALL WEEK	Greg		Jones Neal 6, 8			4	5	6	7	8			
MARK S.			Jones Thu-Fri										



**NO MATTER WHAT IT IS
YOU WANT TO DO
ALWAYS START WITH THE
RELATIONSHIPS FIRST**





Weapons of Influence

Reciprocation



Bad First Drafts
and Iteration

Commitment
& Consistency



Doing
Not Talking

Social Proof



Prototyping
in the Real World

Liking



Co-creation
& Trust

Authority



Facilitation

Scarcity



Zooming Out



ICEBREAKER
9:30-10AM

SCENARIO BUILDING
10AM-10:40AM

20 MIN BREAK
10:40AM-11AM

CONCEPTS (BRAIN WRITING)
11AM-NOON

LUNCH
NOON-1PM

PORTAL DESIGN REVIEW
1PM-1:30PM

PRIORITIES
1:30PM-2:30PM

JOURNEY MAPS
2:30PM-3:30PM

SHARING
3:30-4PM

NEXT STEPS
4PM-4:30PM

JOURNEY #1

STEPS

EMOTIONS

OPPORTUNITIES

JOURNEY #2

STEPS

EMOTIONS

OPPORTUNITIES

9:00AM
CONTEXT

9:15 AM
AGENDA

9:30AM
ICEBREAKER

10:00AM
SCENARIOS

10:30 AM
IDEAS

10:50 AM
10 MINUTE BREAK

11:00 AM
PRIORITIES

11:50 AM
NEXT STEPS

SEE VIDEOS UNDERSTAN

REVENUE READY DAY ONE

80% OF NEW HIRES DON'T HAVE WHAT THEY NEED DAY 1

ONBOARDING

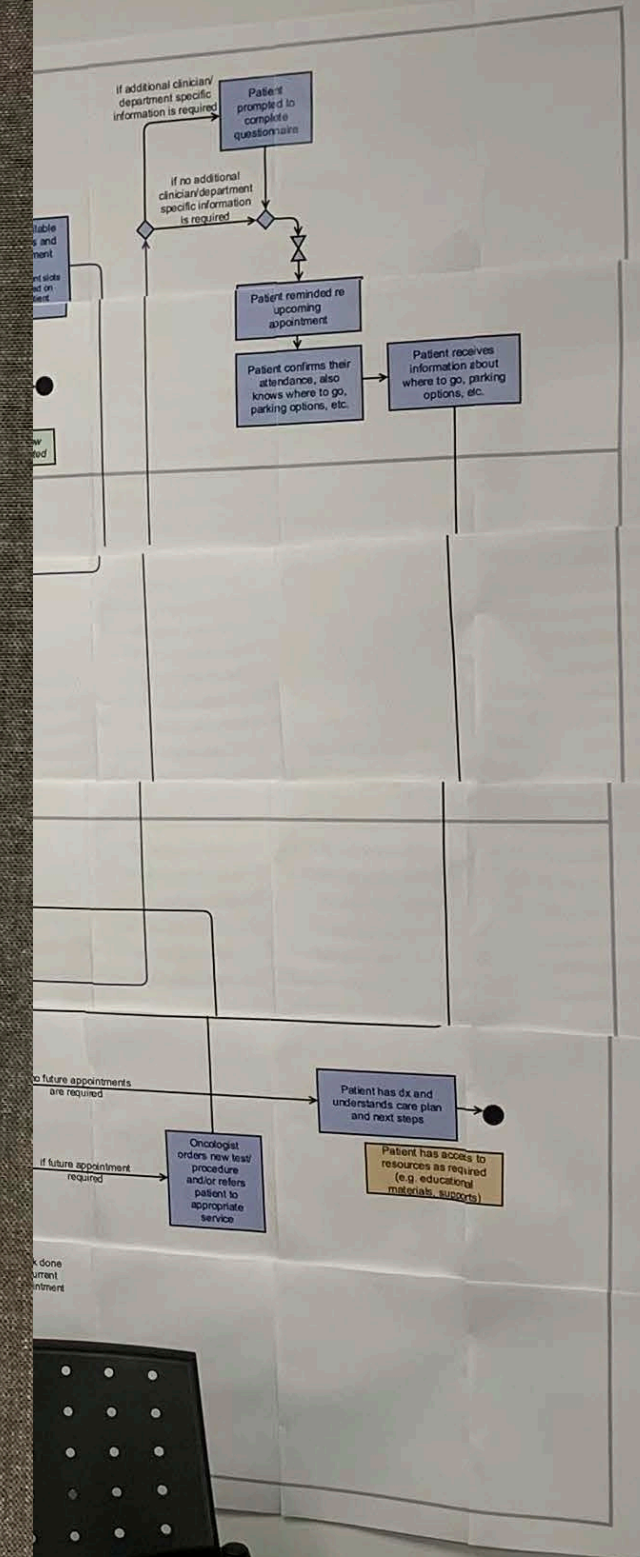
CROSS FUNCTIONAL

DAY 1 INITIATIVE

VISIBILITY TRACKING EXPERIENCE

NEED HIRE BLACK HOLE

NEED FOR MANAGER TRAINING



7:10AM-7:40AM
ICEBREAKER

7:40AM-8:10AM
SCENARIO BUILDING

8:10AM-8:30AM
CONCEPTS

8:30AM-9:30AM
PRIORITIES

30 MINUTE
BREAK

10AM-11AM
PROTOTYPES

11AM-11:30 AM
SHARING

11:30AM-NOON
REFINE FOR THE
AFTERNOON SESSIONS

NOON-1PM
LUNCH

1PM: L.M. Catherine
PATIENT
FEEDBACK

2PM: C.G. Lina
PATIENT
FEEDBACK

3PM
BREAK

4PM
ADMIN: Daniella
FEEDBACK

5PM-5:30PM
RETROSPECTIVE

5:30PM-6PM
NEXT STEPS

THE GAME CHANGERS

REFERRAL PROCESS FOR PATIENTS WORKING FOR STATE



**YOU WILL HAVE BETTER SALES
IF YOU GET MORE
MEANINGFUL PARTICIPATION
FROM YOUR CUSTOMER
(DUH)**



Timeline of Engagement

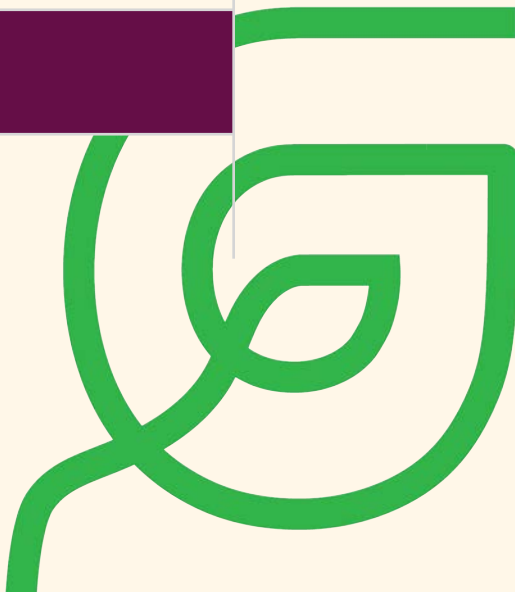
Typical Engagement

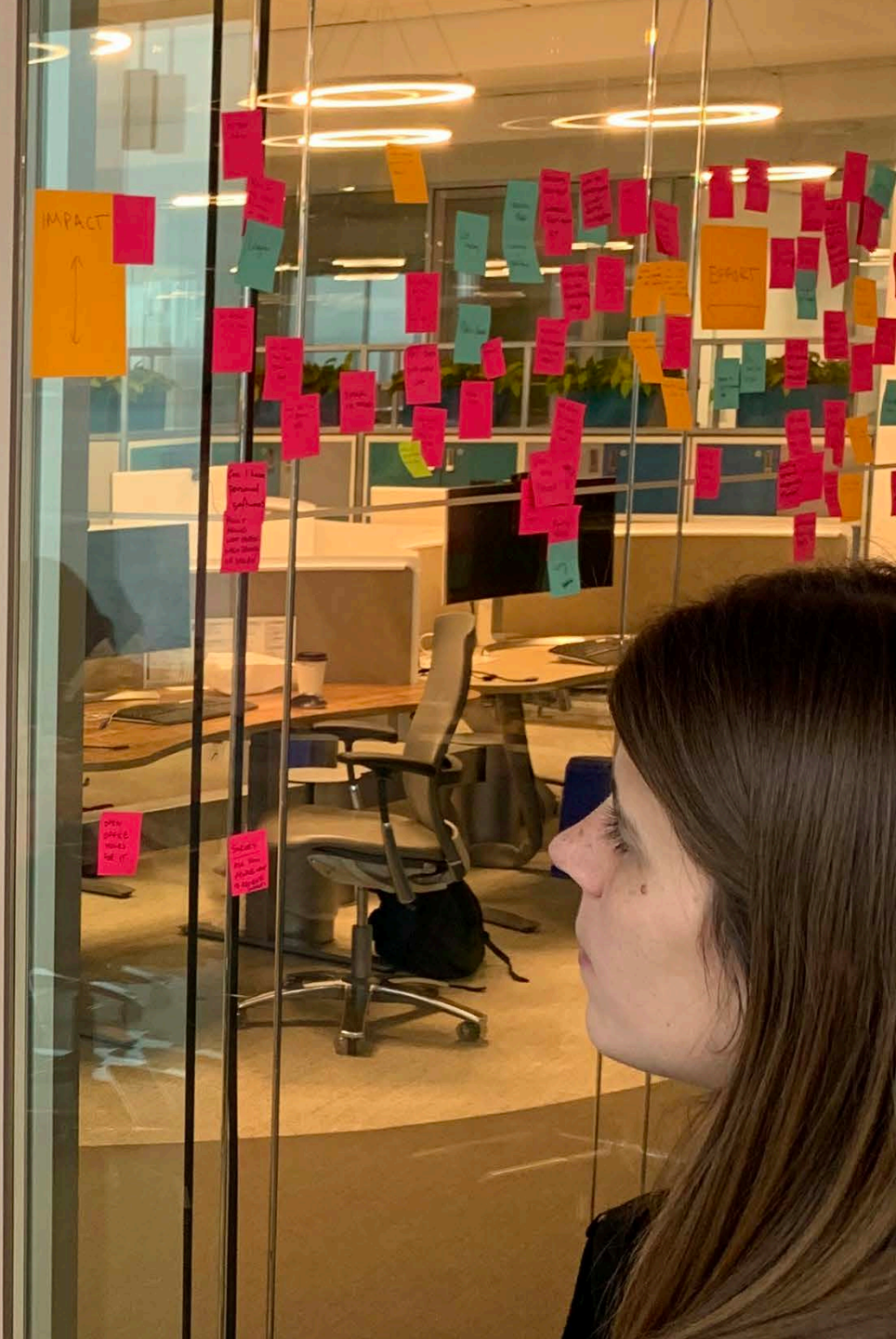
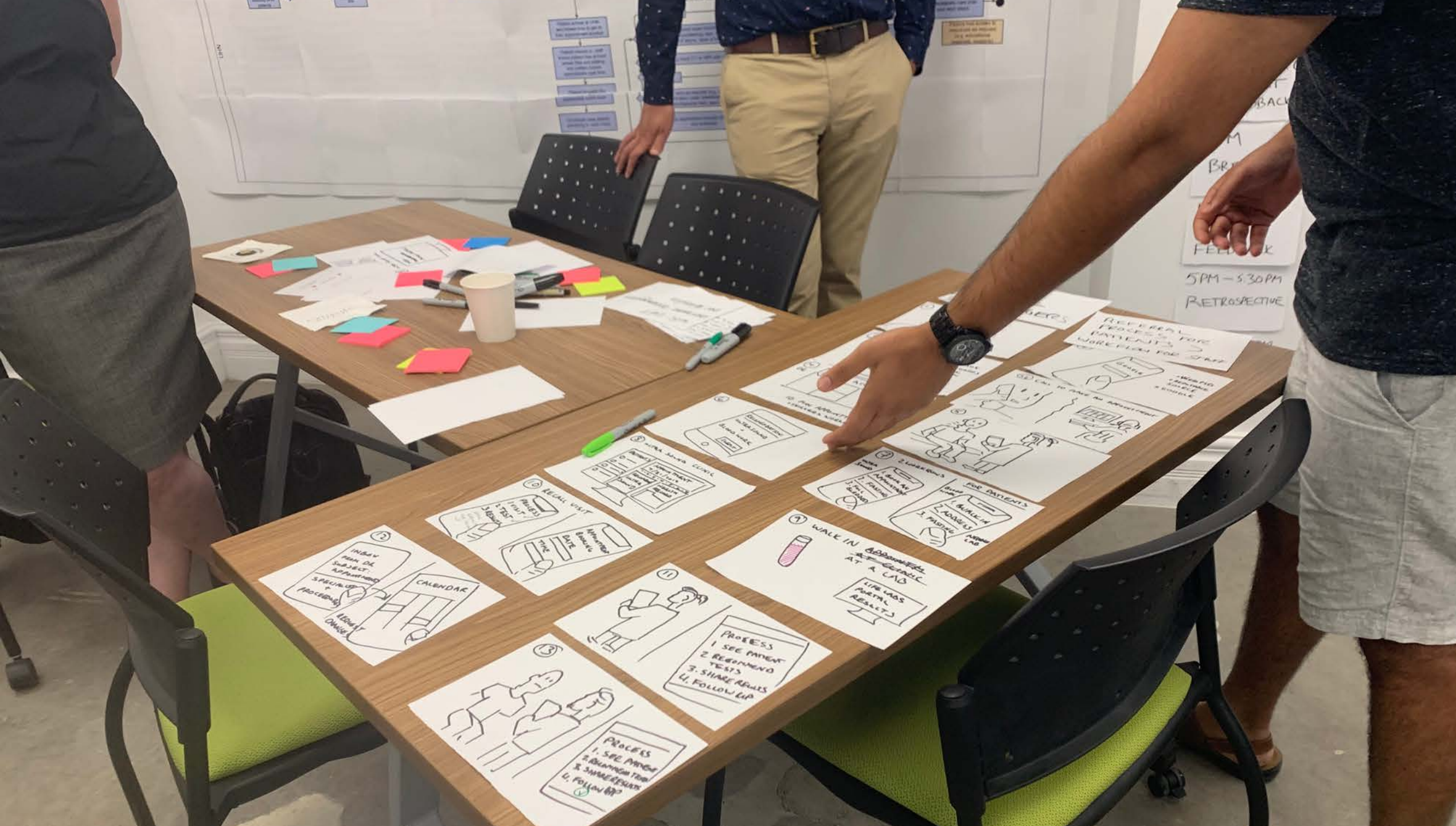


This Meetup



Moar Doing!!!: 100 Workshops/Building High Performance Teams





REALIZATIONS > CONCESSIONS:

**'I HAD A THEORY OF "X"
BUT THEN I SOON LEARNED
THAT IT'S ACTUALLY "Y"'**



Key Artifacts and Design Language

Layouts
Components
Code
Content
Accessibility

LANGUAGE:

Engineering
(What?)

Design Systems

Storyboards
Blueprints
Prototypes
Principles
Canvas

LANGUAGE:

Design
(How?)

Design Frameworks

Research
Strategy
Value Props
Process
Operations

LANGUAGE:

Business
(Why?)

Specific/Rational

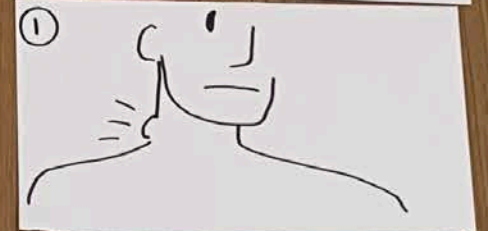
Abstract/Emotional

**This is
where
I like to
play**



THE GAME CHANGERS

REFERRAL PROCESS FOR PATIENTS > WORKFLOW FOR STAFF



Assumption that family doc knows what to do

Eliminate other potential common causes first

ENTRY POINTS

DENTAL: TRAINED TO IDENTIFY

NON-TYPICAL FACTORS?

Entry via ER possible

Referral may come from ENT

Outside entities: Specialists (ENT, Allergist, etc.)

US, FNA results + endoscopy

PHARMACIST

Requisition required

RESULTS MAYBE INCONCLUSIVE

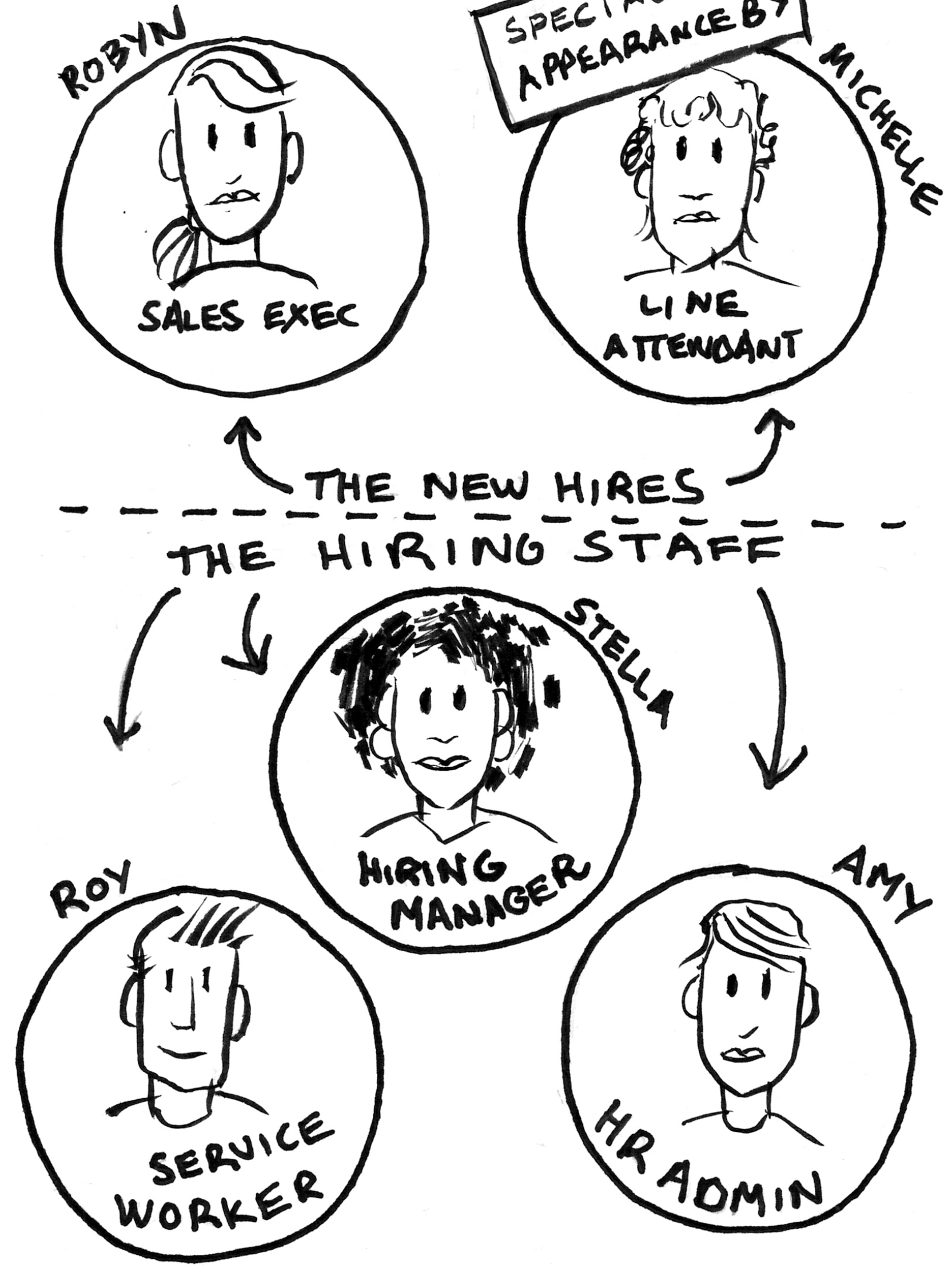
DATABASE OF SPECIALISTS

SCHEDULES ARE VERY INDIVIDUAL

KEEP DISTANCE FROM PATIENT

Referring doctor notification to family doctor

THE PLAYERS



NOTE PAD (WEEK)

"IF I JUST HAD ONE PLACE TO TYPE, MY CALL TIME WOULD GO FROM 5 MINUTES TO 30 SECONDS" —ASHLEIGH

"IT WOULD BE GREAT IF MORE INFORMATION JUST AUTOMATICALLY FILLED IN... THERE IS SO MUCH COPYING AND PASTING." —MARK

CLAIM NUMBER

MEMBER NAME

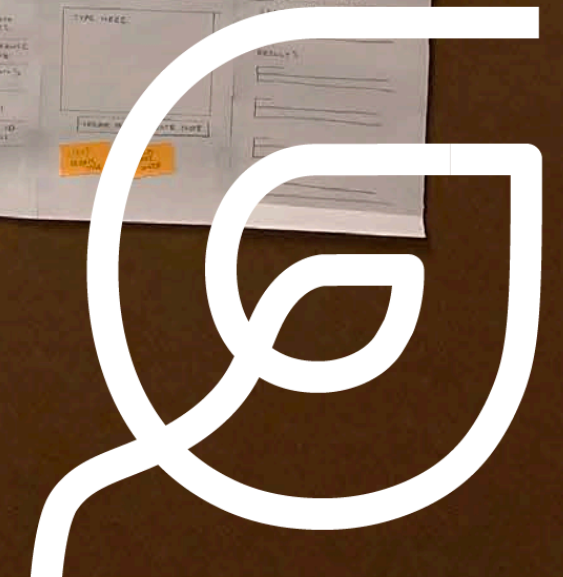
PROVIDER NAME

TOTAL BILL

DATE OF SERVICE







OPEN INTERACTION: MY CLAIM: EDIT OTHERS: CREATE

CLOSE INTERACTION: MY CLAIM: EDIT OTHERS: DELETE NEW: CREATE



Document to Refine

Example: Service blueprint from an internal application for managing customer work

	1	2	3	4	5	6
Actions	 Decide with your customer	 Planning with your customer	 Run the activity	 Digitize/batch capture	 Review and make actionable	 Make it visible
Insights	<p>“Tell me about renewals... you haven’t touched this account in 3 months...” — Manager</p> <p>“Pre-populated activities... these are 8 key activities” — Manager</p>	<p>“Email Domains... That’s how you can name the account... based on who is invited.” — Consultant</p>	<p>“So many times, whiteboard pictures sit on people’s phones... Those drawings need to be shared.” — Consultant</p>	<p>“I would love to just access my calendar and pull that invite into a form and just add to it. That would be great for adoption.” — Manager</p>	<p>“SC peer measurement is important to me... I use shotgun to batch import and then edit.”— Neal Laufenberg</p> <p>“Every keystroke must map to the value to the SC” — Manager</p>	<p>“If I can’t bring numbers to my sales directors, they aren’t going to care” — Consultant</p>
Channels	Desktop Account Dashboard	MS Outlook	Handwriting Notebook/whiteboard	Mobile Easy Capture	Desktop Dashboard	Desktop Group Dashboard
Friction	<ul style="list-style-type: none"> • Quicker insight to health of the account • Notifications of upcoming renewal will help deepen relationships 	<ul style="list-style-type: none"> • Everyone is using outlook for calendar and email. • Cal events have the people and place • Integration push/pull data would + adoption 	<ul style="list-style-type: none"> • Focus on high value, strategic activities like journey mapping and account planning • Less digitized, more collaborative content 	<ul style="list-style-type: none"> • Mobile Authentication • Voice to text • Drop down menus • Automation of next steps • Individual VS batch capture 	<ul style="list-style-type: none"> • Making dashboards • Inconsistency in what is being measured • Garbage in garbage out - with inconsistent input or updates 	<ul style="list-style-type: none"> • Requires activity data to be tied to pipeline and ACV • Inputs in 2 systems



Session: Get Closer to Yes



Activities

- 10 Minutes UNDERSTAND: Scenario Building for the Icebreaker
- 10 Minutes CO-CREATE: Generate Ideas
- 10 Minutes VALIDATE: Impact over Effort
- 5 Minutes DEFINE: Fill out the Framework as a Team
- 5 Minutes DELIVER: Review with your Team How to Present
- 20 Minutes GUIDE: Get a Few Teams to Share



Ground Rules

- Everyone Participates
- No Technology Unless You Want to Take Pictures
- Raise Your Hand if You Are Stuck



10 Minutes UNDERSTAND: Scenario Building

- Each person takes a half sheet of paper and a marker.
- Fold it in half.
- 3 Minutes: Write on the left side of the paper a few details for someone **WHO** might have said 'no' to you in the past (only details you are comfortable sharing).
- Pass the paper to your left.
- 3 Minutes: Read the details on the left side of the paper to yourself and now write on the right side of the paper some reason **WHY** they might have said no.
- 4 Minutes: Pass the paper to your left again and take turn introducing your self and reading each of the scenarios.

WHO?

● _____

● _____

● _____

WHY?

● _____

● _____

● _____

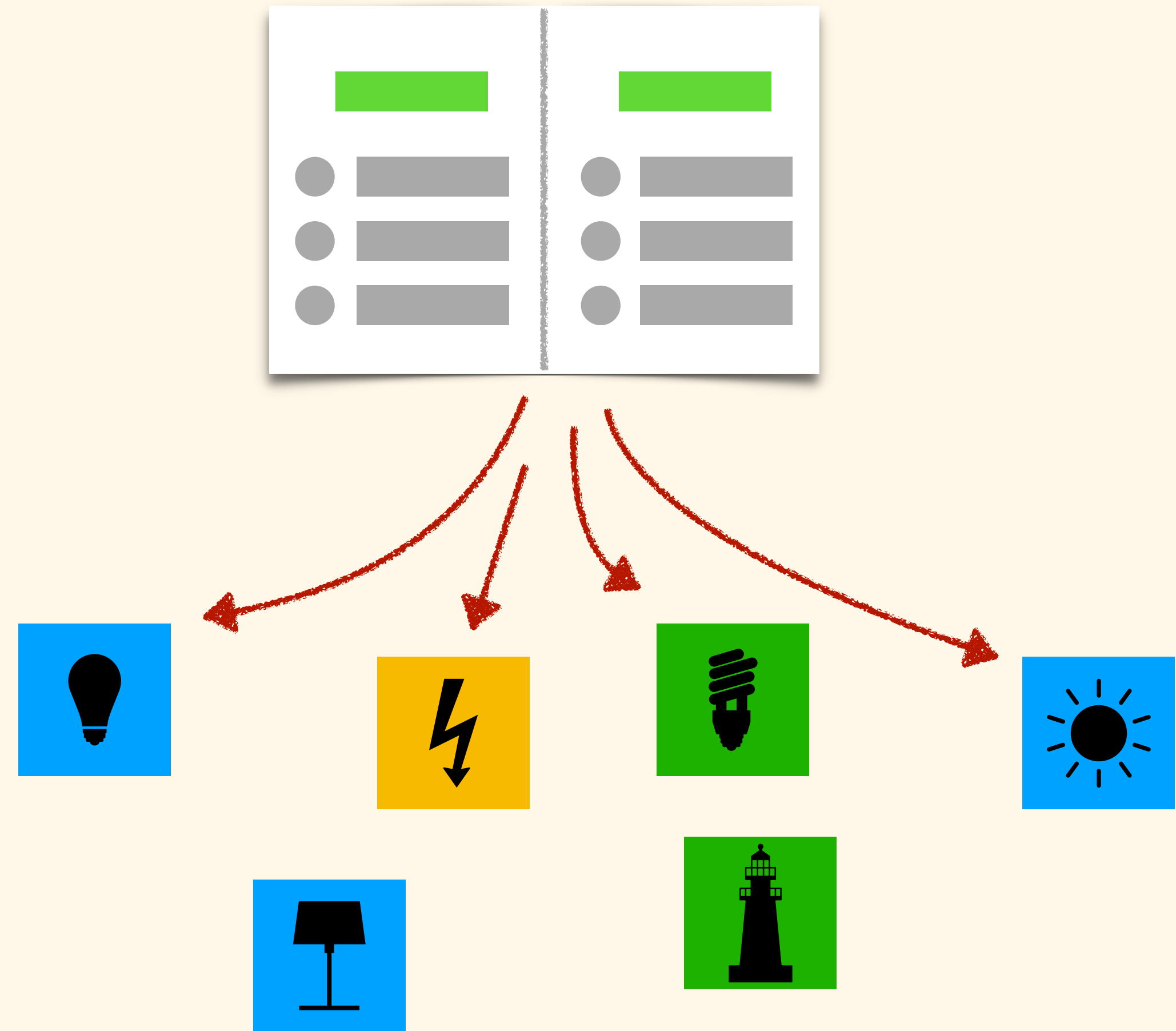
Fold

Fold



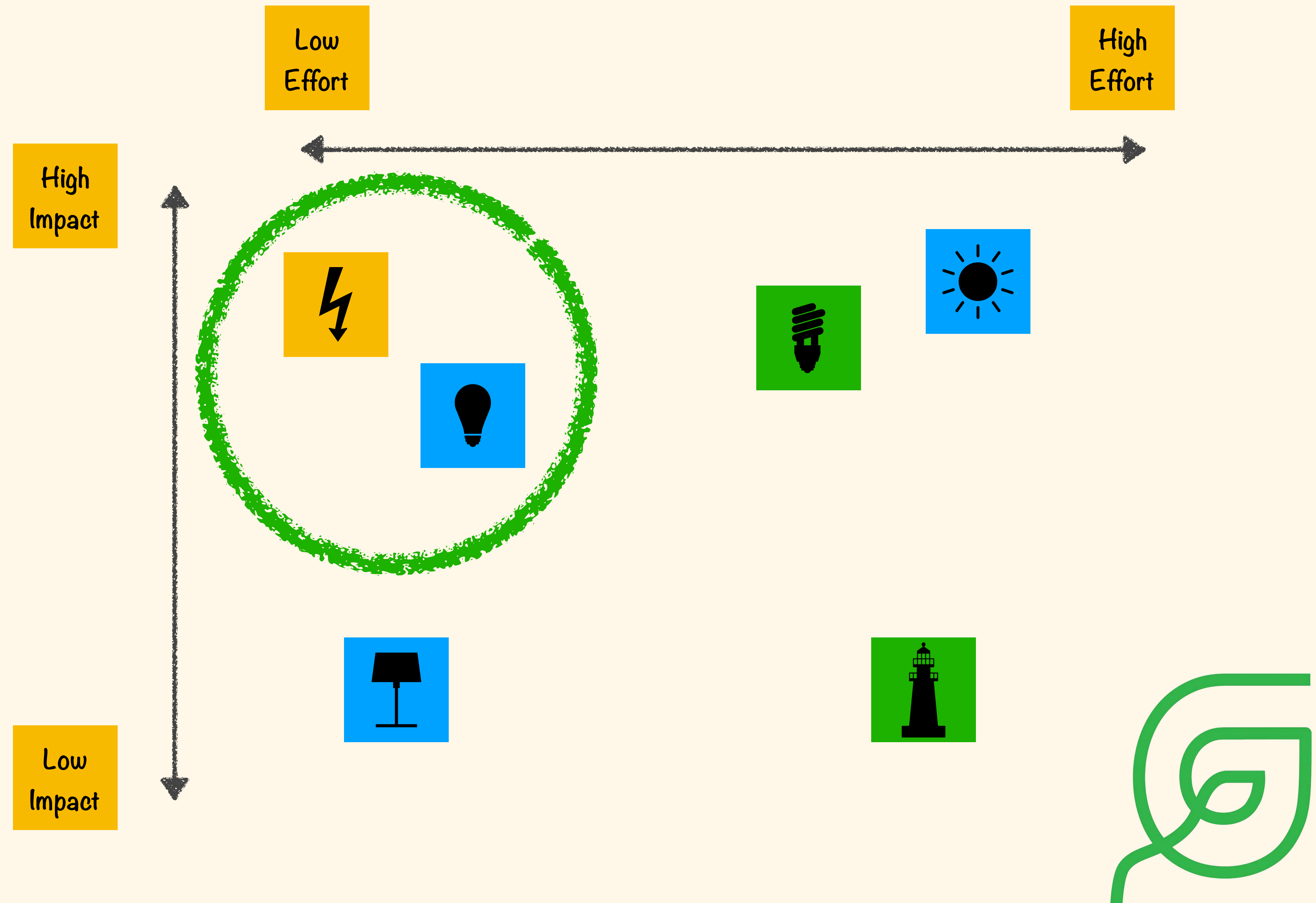
10 Minutes CO-CREATION: Generate Ideas

- 2 Minutes per Scenario: Write as many 'ideas' as you can for each scenario, things that you think may help in each situation.
- Don't yell out ideas. Write it down first and then share it with the group.
- This is meant to be quick. There are no wrong answers.
- Really stretch your thinking.



10 Minutes VALIDATION: Impact Over Effort

- Everyone stands up.
- Create an effort and impact matrix on your table. Label with post-its.
- Go through each of the ideas as a team and plot the ideas on the matrix.
- Use your hands to describe each idea. Hands far apart to label effort, a hand up high for effort.



5 Minutes DEFINE: Framework

- Take 5 minutes to go through each of the form fields as a team and fill in the blanks.
- Refer back to the materials you have generated for answers.

GET CLOSER TO YES

After reflecting with the group about the scenarios you have generated, fill out the framework to have a shared vision on how to get to yes.

Team Name (Make something up):

Participants
(Your names here):

Biggest Challenges (Pick something from your scenarios):

Near Term Opportunities (One or two ideas from the sweet spot):



5 Minutes DELIVER: Practice

- Discuss as a team on how you would present what you've made.
- Be sure to designate roles and share responsibilities for communicating your vision



GUIDE: Sharing



Takeaways

What's the same?

Access

Relationships

Understanding

Simplicity

Value

What's different?

Doing VS Talking

Milestones VS Winning

Impact VS Output

Teaming VS Individual

Realizations VS Concessions



Questions?

