



SERVICE DESIGN NETWORK, NEW YORK CHAPTER

Talk & Discussion: Applying Service Design within a Financial Institution

October 13, 2020

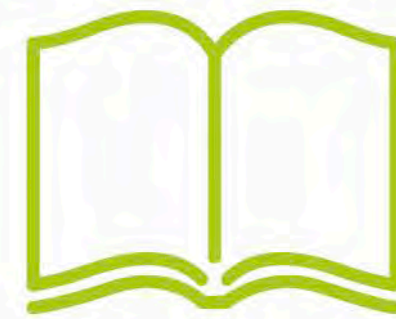
SDN 
NEW YORK CHAPTER

What is the Service Design Network?

A volunteer led organization with over 45 international chapters.



Facilitate knowledge exchange



Create relevant content



Recognise & celebrate best practice



Raise awareness & grow service design



Connect the international community



Enrich the local SD community

Reminder to Save the Dates

We will continue to run **online events on the second Tuesday of each month for the foreseeable future** if you want to look out for our event launches.

We typically launch events the week prior / the first week of the month.

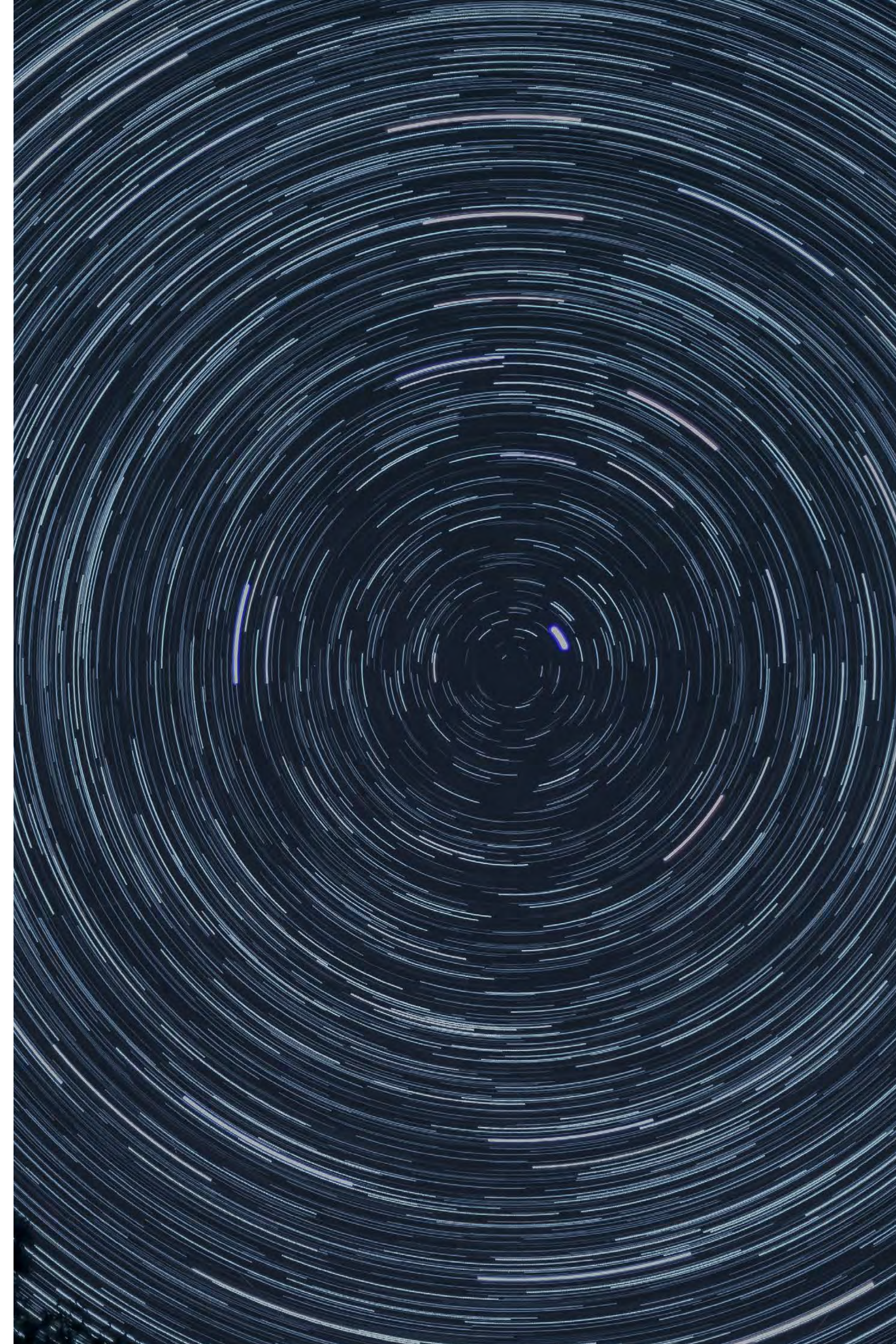


Website for SDN NYC to Share Content

Check out **SDNNYC.com** for event materials all in one place

*ie. links to presentations if available,
Medium recaps, video recordings...*

I will give you a quick tour now.



If You Like Something, Share It!

@SDN_NYC on Instagram

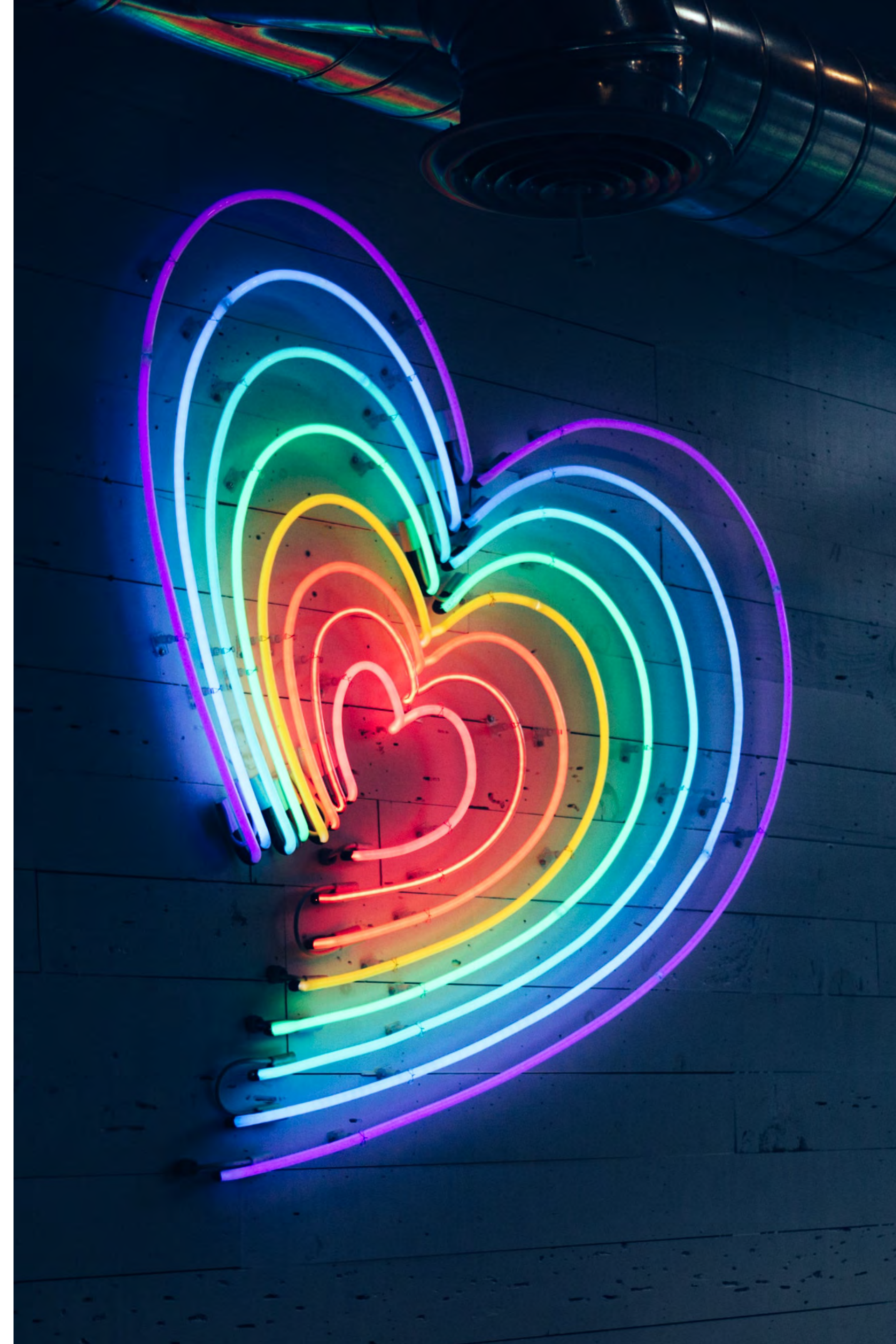
@SDN_NYC on Twitter

@SDN New York Chapter on LinkedIn

Use Tags – #sdnnyc #sdn #nycdesign

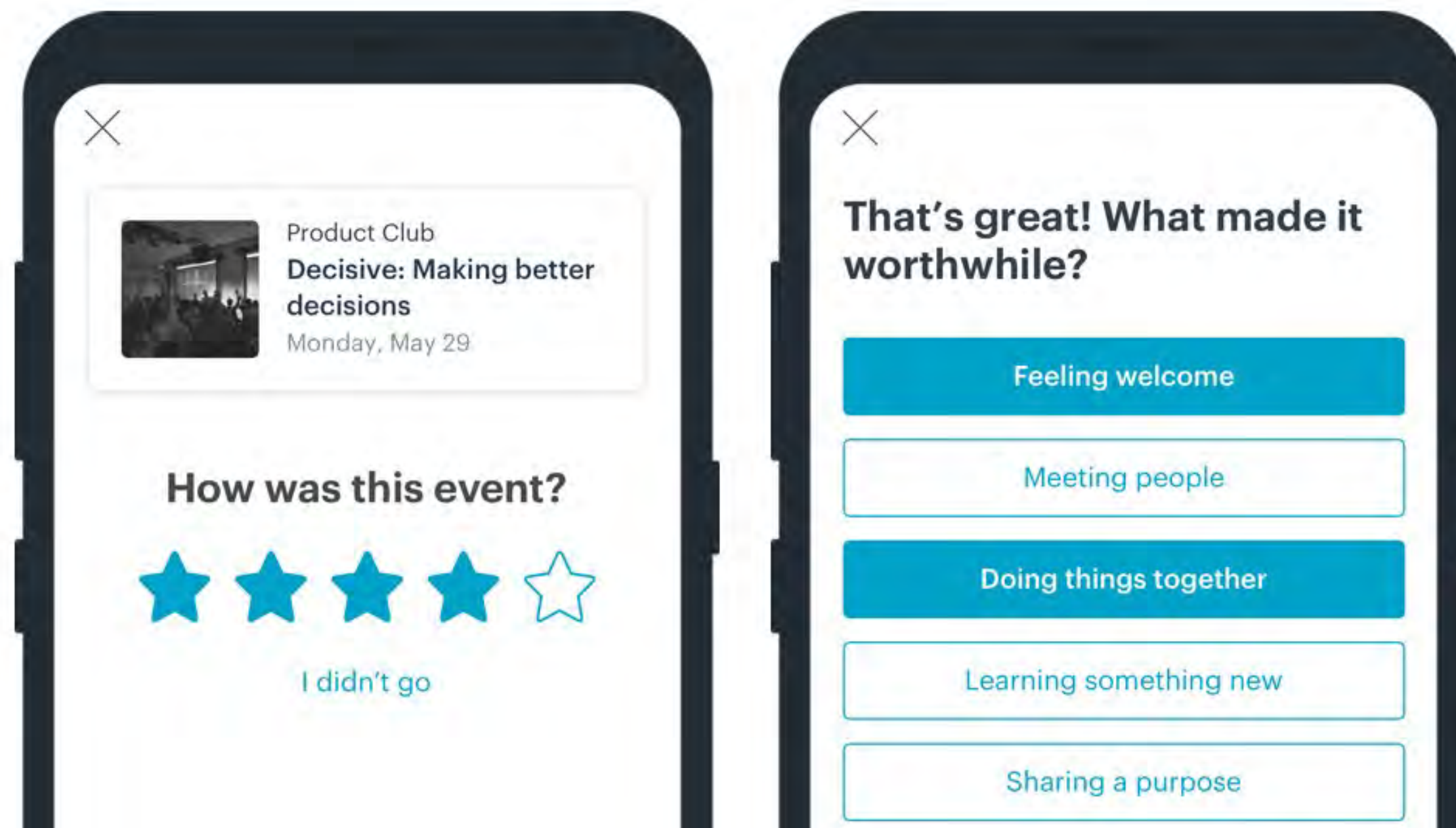
#nycservicedesign #servicedesign

#servicedesignnetwork #design



Post Event Please Rate Us Online

We want to be sure to serve the community and learn from each event we host with you!



The image shows two smartphone screens displaying a post-event survey interface. The left screen shows the event details and a star rating system. The right screen shows a list of reasons for attending the event.

Event Details:
Product Club
Decisive: Making better decisions
Monday, May 29

How was this event?

★ ★ ★ ★ ☆
I didn't go

That's great! What made it worthwhile?

- Feeling welcome
- Meeting people
- Doing things together
- Learning something new
- Sharing a purpose



SDN Global Conference Code

The Service Design Network Global Conference 2020 will be online **October 22-23rd** across a listing of timezones (15 hours ongoing)

Get 20 percent off your ticket our code **SDGC20ChapterNewYork20%Off**



Call for SDN NYC Speakers, Facilitators

If you would like to **run any sort of event as a speaker / facilitator** (*or recommend someone*) please fill out the form we are dropping in chat...

Or look for the **form link in our Instagram bio** after this event closes!



EVOLVING HOW WE WORK

Applying Service Design within a
Financial Institution

October 13, 2020



Hello!

My name is **Natalie Kuhn**

I am a Senior Manager of Service Design
at **Capital One, Commercial Bank**

I also co-run the **New York chapter** of
the global **Service Design Network**

Twitter: @n4t4li3

Website: nataliekuhn.com





A dark, moody photograph of two dogs on a beach. On the left is a small black and white dog, possibly a French Bulldog, looking towards the right. On the right is a larger white dog with black spots, possibly a pit bull mix, looking towards the left. The background shows the ocean and a cloudy sky. The text is overlaid in white on the dark background.

Who are you?
What brings you here?

Drop your role and comfort level
with service design in the chat

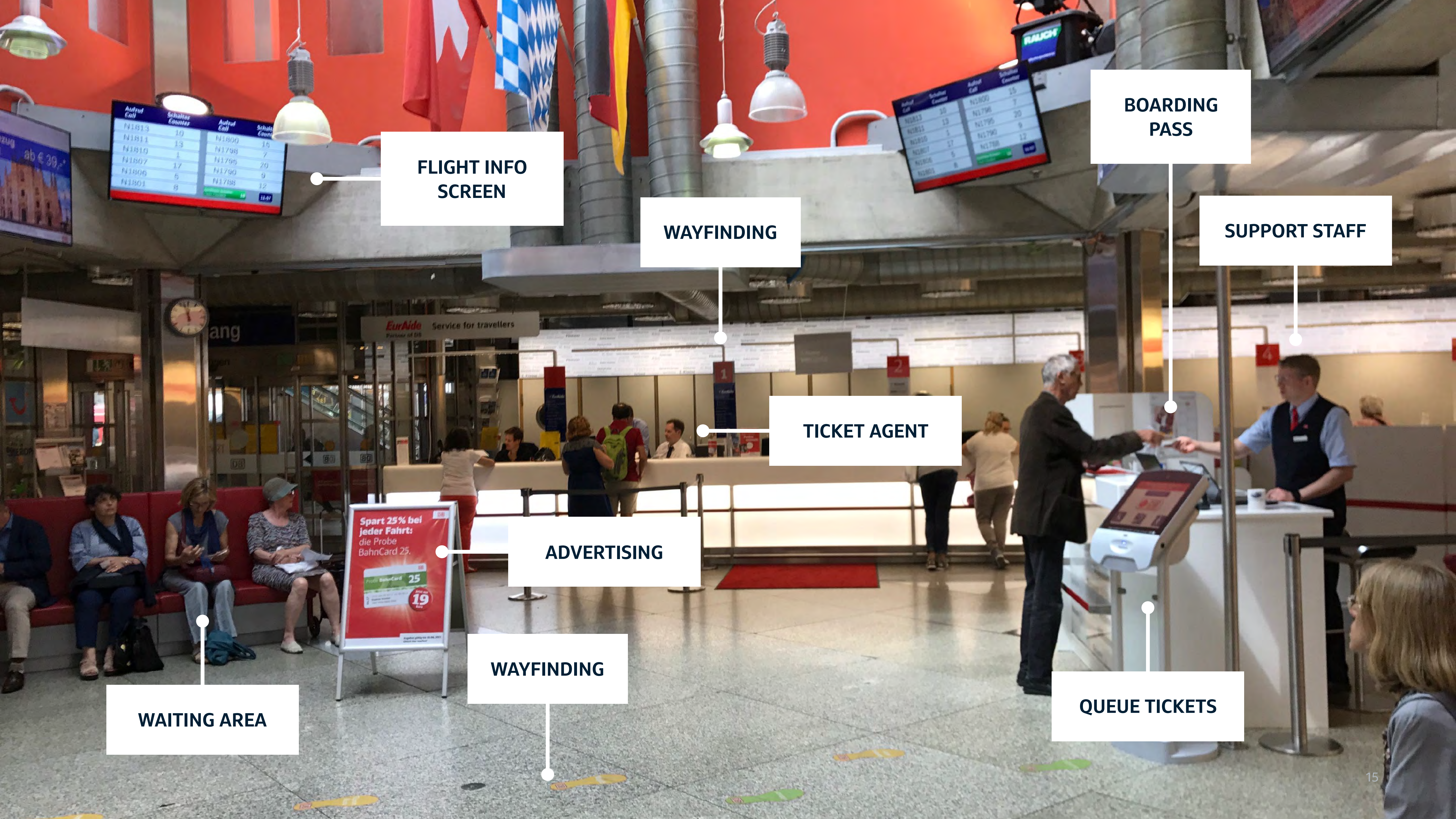


Service Design Refresher

| What is a service?

Services are orchestrated **systems**, delivered **over time**, providing **value** to customers, associates, and the business. While you may not be able to touch, or even see, all elements of it, there is **evidence** of it.

Let's think about an airport...



Aufzug Entf.	Schalter Counter	Aufzug Entf.	Schalter Counter
N1813	10	N1800	15
N1811	13	N1798	7
N1810	1	N1795	20
N1807	17	N1790	9
N1806	5	N1788	12
N1801	8		

**FLIGHT INFO
SCREEN**

WAYFINDING

**BOARDING
PASS**

SUPPORT STAFF

TICKET AGENT

ADVERTISING

WAYFINDING

QUEUE TICKETS

WAITING AREA

Product Design

Designing for the experience with
a single touchpoint or product



VS.



Service Design

Designing for the orchestrated
experience of all service touchpoints

| Why Service Design?

Our economy is now **dominated by services**.

Success requires not just individual sales, but **ongoing relationships**. We are competing for customer affection and loyalty like never before.

Basic SD Ingredients



Do you have some of these? A few? All? Across org? Just parts?

RESEARCH



Proper Inputs

Understanding of who needs to be involved to gain a comprehensive current state view

SENSE MAKING



Basic Frameworks

Awareness of tools to help you make sense of findings from stakeholders ie. service blueprint

CO-CREATION



Strategic Ideation

Ability to get the right people in a room to facilitate productive sessions for realistic ideas

PRIORITIZATION



Governance, Prioritization

Teams aligned to complimentary, if not the same, goals for real progress

REALIZATION



Follow Through

Dedication to progress over an extended period of time to test, learn and impact change

| Today is About Sharing Experiences

Describe what I have learned working in the **Capital One Commercial Bank** for the last 3.5 years **AND allow you to chime in with your experiences as well.**

- Stories, examples
- Discussion, **questions**
- Time to reflect



A hand is shown holding a map, with the text "Where We Started" overlaid in white. The text is underlined with a blue line. The background is a dark, blurred image of a map, with some street names like "Poznańska" and "Marszałkowska" visible. The overall tone is professional and focused on location and history.

Where We Started

Capital One

Consumer
Bank

Commercial
Bank

Other Groups
...

Experience Design



Capital One

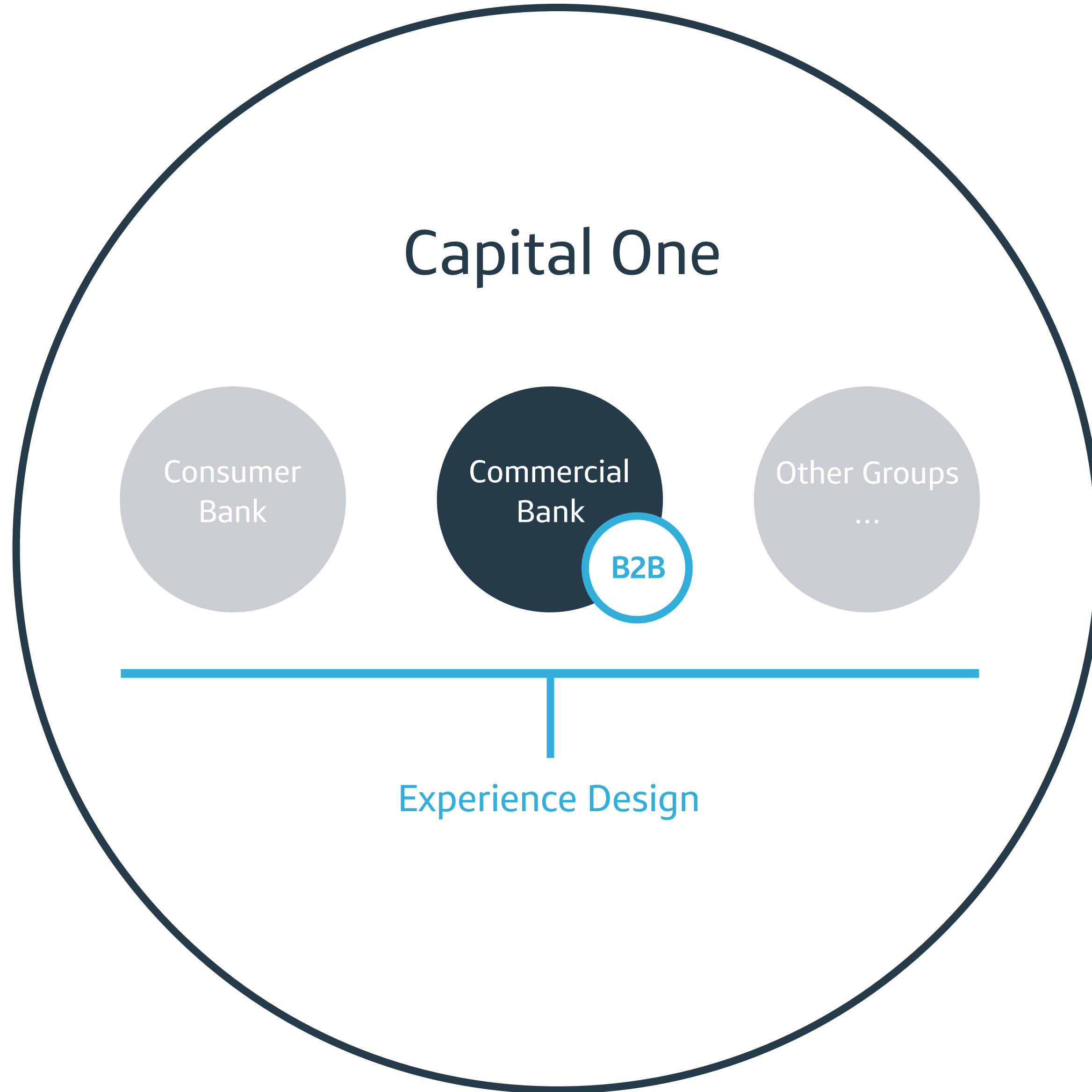
Consumer
Bank

Commercial
Bank

B2B

Other Groups
...

Experience Design



Capital One Commercial Bank

B2B Payments

Credit

Card

TM

Back to the ingredients for Service Design

RESEARCH



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Our Commercial Bank in 2017

RESEARCH



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Governance

Teams aligned to complimentary, if not the same, goals so that they can enable one another

REALIZATION



Follow Through

Dedication to progress over an extended period of time to test, learn and impact change

IF I WERE OUR TEENAGE
GIRL TARGET, I WOULD
LOVE OUR NEW PRODUCT.

HAVE YOU ACTUALLY
TALKED TO ANY TO
MAKE SURE?

WHAT? AND
LEAVE THIS
ROOM?



TOM
FISH
BURNS

Our Commercial Bank, 3 years later, in 2020

RESEARCH



Proper Inputs

Understanding of who needs to be involved to gain a comprehensive current state view

SENSE MAKING



Basic Frameworks

Awareness of tools to help you make sense of findings from stakeholders
ie. service blueprint

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Follow Through

Dedication to progress over an extended period of time to test, learn and impact change

| Summer 2019 Workshop

“This is such an **intuitive way of working**, I am surprised that, in some parts of the bank, we still aren’t working this way...”

*– participant from the most recent workshop
I facilitated at Capital One dedicated to Service Design*

| But what about the other ingredients...

Over 3 years in and we have not fully embraced *all* of the ingredients that enable Service Design possible at scale. Why? **Because changing mindsets and the way people work is hard.**

It is much easier to just stay the same.

- 1 Research – creating a sustainable practice
- 2 Sense Making – tools (of many) to get you started
- 3 Co-Creation – workshop caveats, learnings
- 4 *Prioritization – aligning teams to a targeted goals*
- 5 *Realization – following through to service launch*

1

A Sustainable Research Practice



| A Sustainable Research Practice

We began **shifting the paradigm** of building products and services within a vacuum, we stood up a research process, research team, and started talking **directly to our clients** in their workspaces

BEST PRACTICES

- Research team to use this document to help them prep, format interview, plan debrief
- Associated documents include client data/background sheet, research guide, debrief sheet

PRE INTERVIEW -

1. Review client background
 - What services does the client use of ours?
 - What recent interactions have they had with us? RM, Sales, Research if applicable?
 - What specific feedback have they provided us in the past?
 - Any red flags/current issues they are facing or that are being resolved at the moment?
2. Prep and Review Research Guide (attached)
 - Look through listing of questions, think about topic areas specifically to be covered
 - Guide is just a guide, not a script - think about flowing with conversation and checking off topic areas
3. Review Key Logistics
 - What is the specific address? Office number? Main point of contact?
 - What is required to enter the building? Security? How much time to allot?
 - Is the building complex to navigate?
4. Establish team roles
 - Typically there are 2 people involved. Interviewer (facilitator) and notetaker (asks a few followup questions)
 - More than this can become overwhelming to the interviewee (seems like a panel, presentation)
 - 3 is alright as long as we let the interviewee know what everyone is doing there

DURING INTERVIEW -

1. Arrive early
 - Make sure to get through security/up to office or room a few minutes beforehand
 - Make sure the room is tidy, grab a water for yourselves and the participant
2. Introduce all people and roles (at Capital One but also their role in interview)
 - It is important to set expectations around the purpose of each individual involved
 - It can be overwhelming for someone to talk about themselves for a full hour especially in front of a couple people
3. Describe purpose, format (most of this is listed in research guide)
 - Important to set expectations - they will speak a lot, we will take a lot of notes etc
 - There are no wrong answers, we are here to learn and understand in their words
 - We ask permission to record audio (most are fine with this)
 - We ask permission to take a few photos of the space to understand their environment (most are ok with this)
4. Built rapport
5. Conversation through questions/topic areas (see research guide)

DEBRIEF SHEET

- Research team to record responses immed
- The aim is to surface first impressions and sessions and early-stage synthesis.

Interviewer:
Role:

Company:
Location:

Interviewers: Natalie Kuhn
Date:

Warm Up

Key Responsibilities

1.

2.

3.

Data & Reports, Sta

Top 3 Reports Us

1.

2.

3.

How State



Design a process through testing and learning.
Create something that works for your next session
/ the next month / until you think of something
better, iterate upon it. Just get going.

BEST PRACTICES

- Research team to use this document to help them prep, format interview, plan debrief
- Associated documents include client data/background sheet, research guide, debrief sheet

PRE-INTERVIEW

1. Review client background
 - What services does the client use of ours?
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 - Any red flags/current issues they are facing or that are being resolved at the moment?
2. Prep and Review Research Guide (attached)
 - Reviewing of questions about topic areas specifically to be covered
 - What is the specific address? Where is it? Make sure you know the location
 - What is required to enter the building? Security? How much time to allot?
 - Is the building complex to navigate?
4. Establish team roles
 - Typically there are 2 people involved. Interviewer (facilitator) and notetaker (asks a few followup questions)
 - More than this can become overwhelming to the interviewee (seems like a panel)
 - Researcher is also there to know what to ask

DURING INTERVIEW

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Notetaker:

Company:

Location:

Interviewers: Natalie Kuhn

Date:

1.

2.

3.

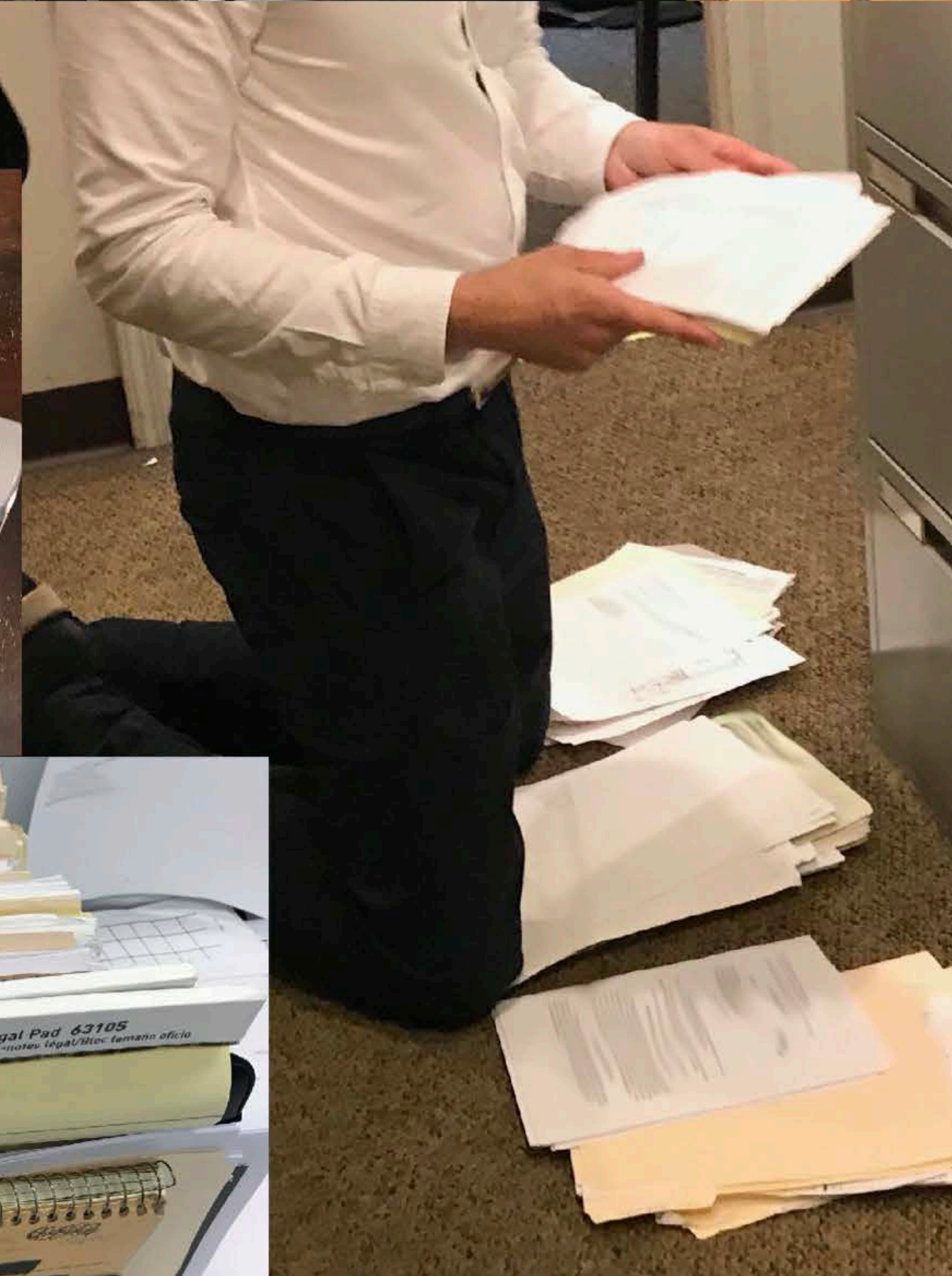
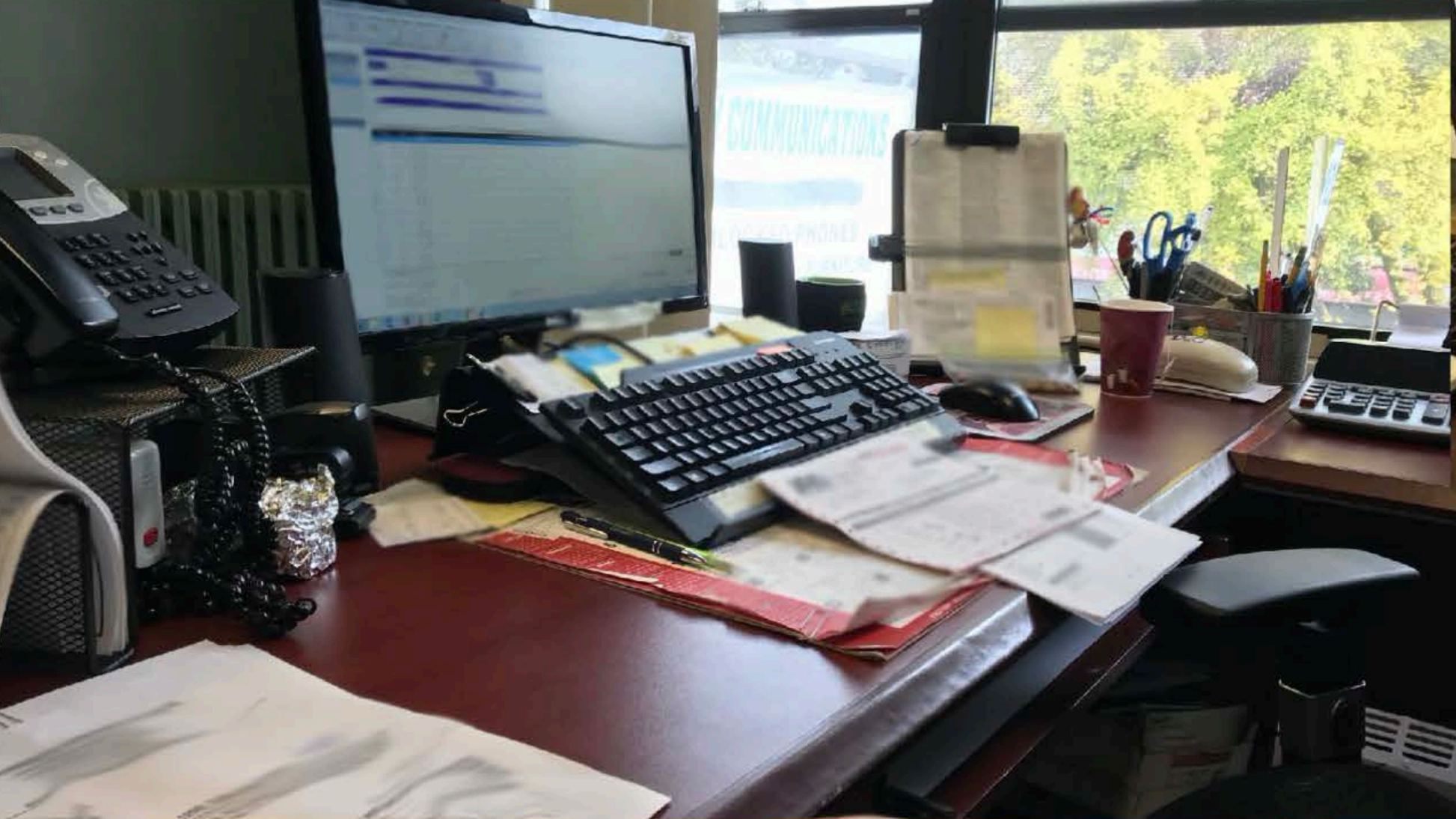
Top 3 Reports Us

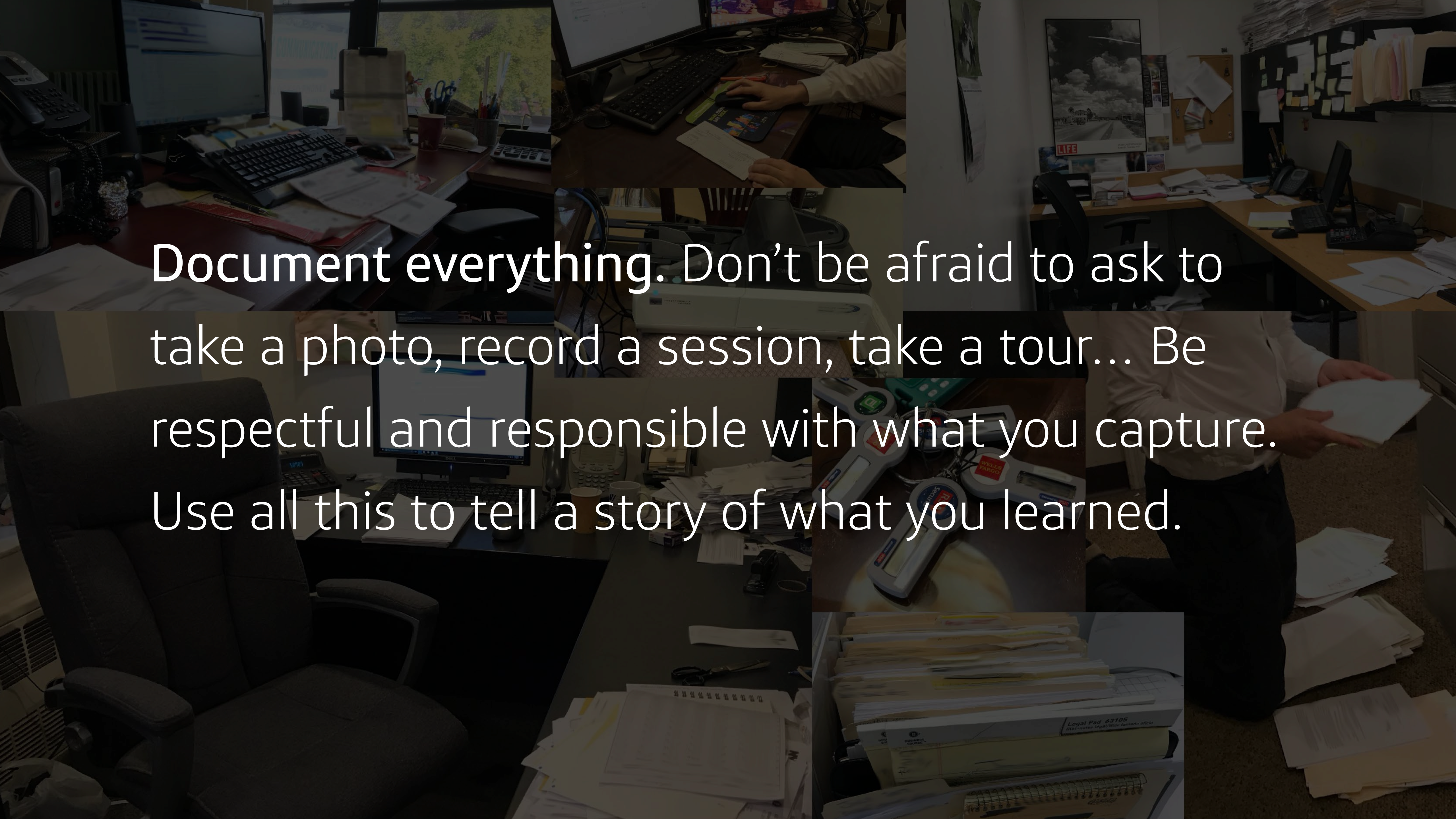
1.

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3.

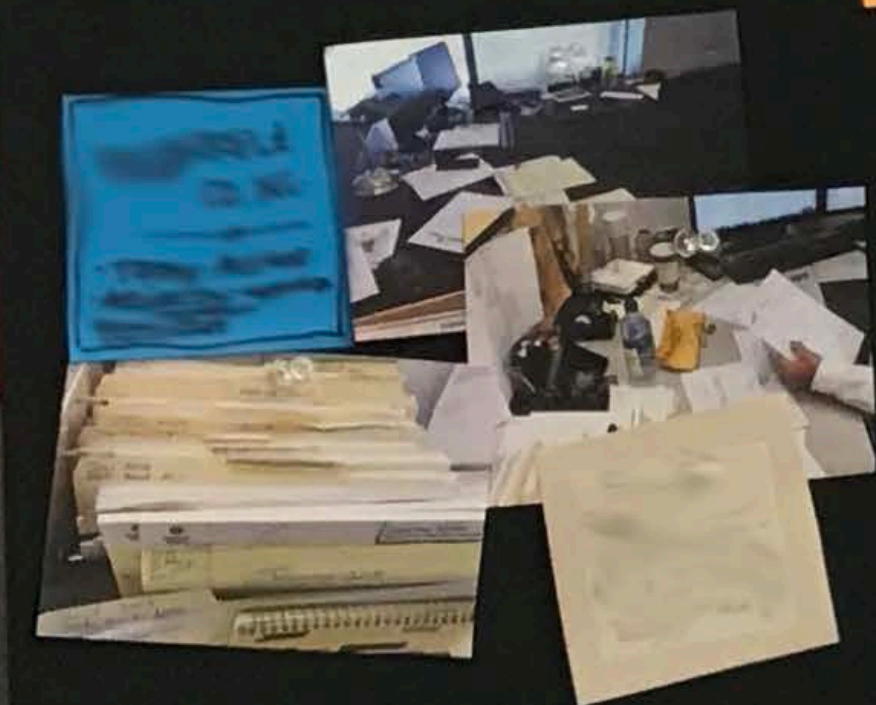
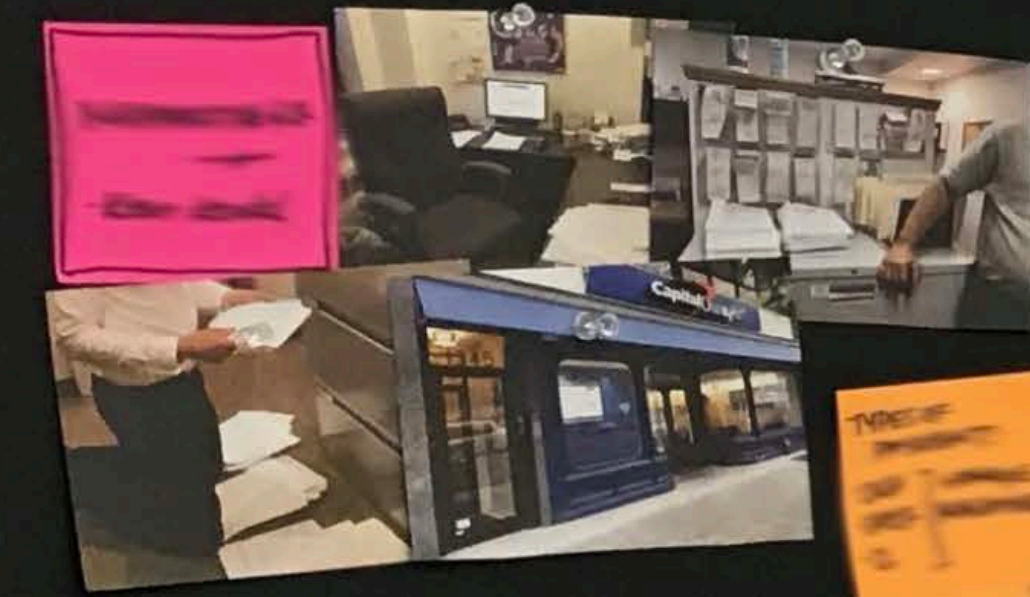
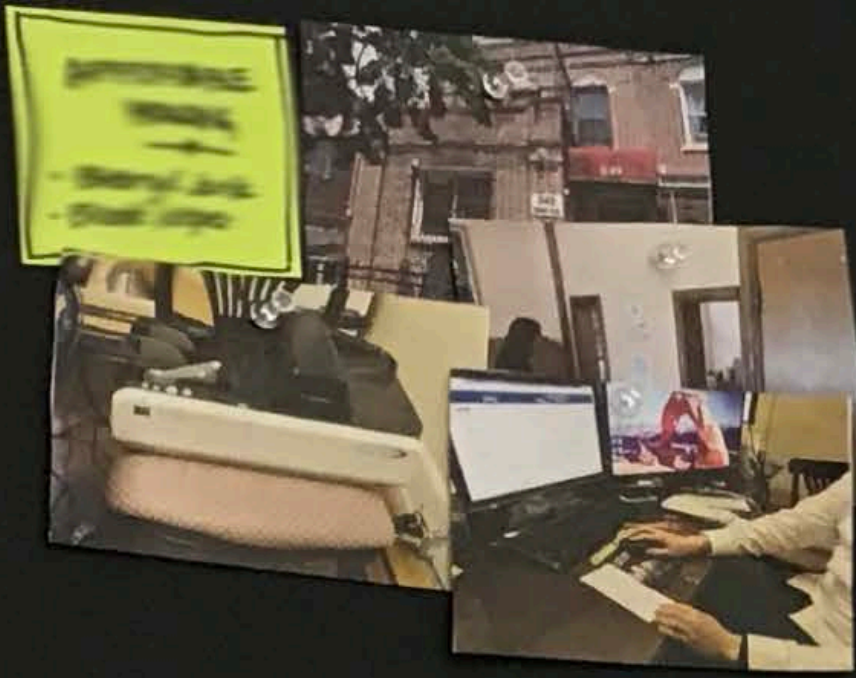
How State



A collage of office scenes. The top left shows a desk with multiple monitors and papers. The top center shows a person's hands using a mouse at a desk. The top right shows a desk with a computer and a bulletin board. The middle left shows a desk with a monitor and keyboard. The middle right shows a person in a white shirt holding a stack of papers. The bottom left shows a desk with a keyboard and papers. The bottom center shows a stack of papers and a spiral notebook. The bottom right shows a stack of papers and a spiral notebook.

Document everything. Don't be afraid to ask to take a photo, record a session, take a tour... Be respectful and responsible with what you capture. Use all this to tell a story of what you learned.

1 WEEK, 4 CLIENT INTERVIEWS



THEME INSIGHT

Handwritten notes on sticky notes, including terms like: CHALLENGE, ACCOUNT CENTRALIZATION, WIRE TEMPLATE, ACCOUNT OPENING, NONSTANDARD DATA, and QUESTION.

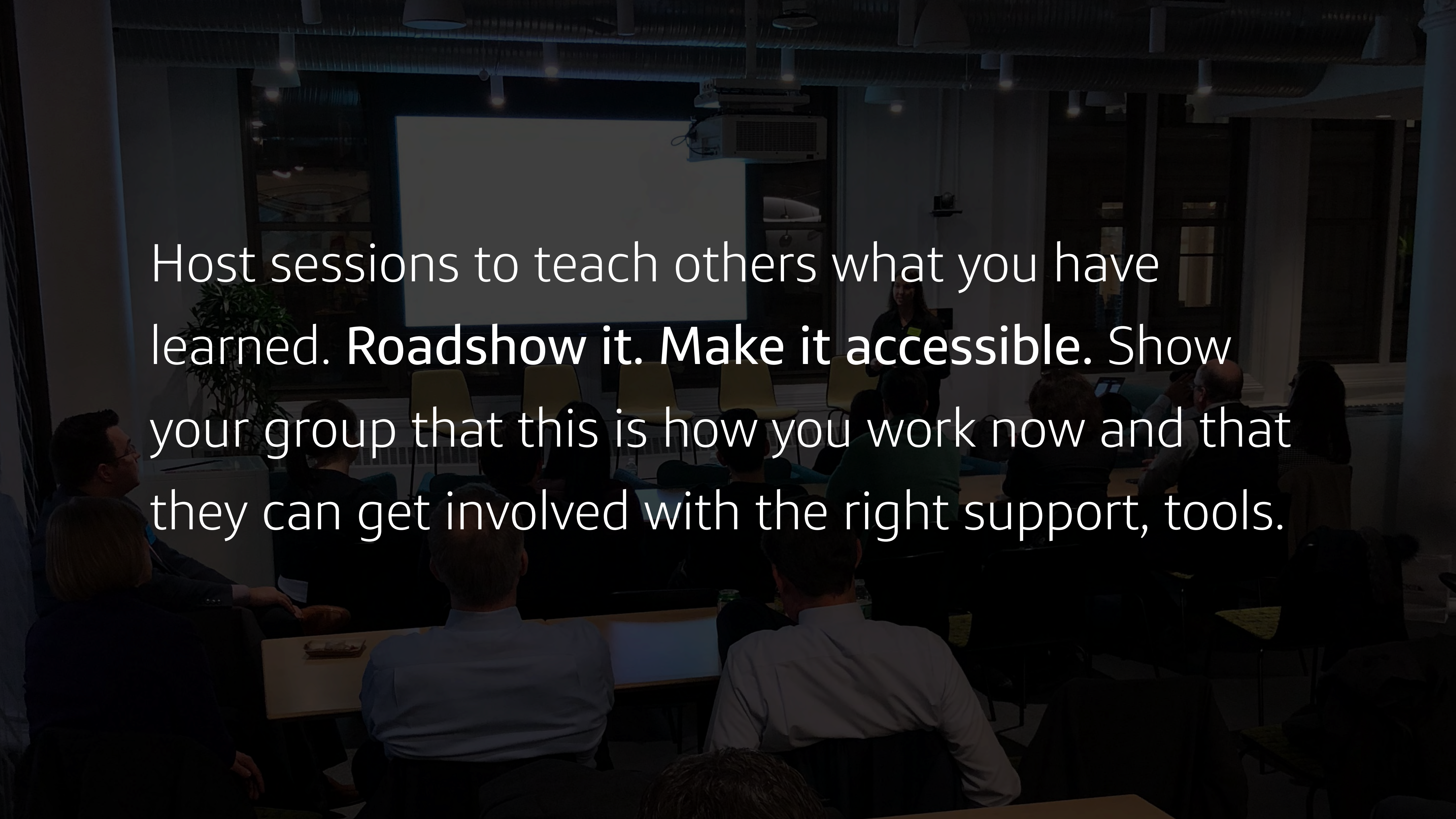
QUESTION

1 WEEK, 4 CLIENT INTERVIEWS
FIELD INPUTS

Hype up the research you have done. Show it off around the office, once again in a responsible, but visible way. Get people to ask about it. The use of physical space makes the work more interactive.

QUESTION



A dimly lit conference room with a woman presenting to a group of people seated at tables. A large whiteboard is visible in the background.

Host sessions to teach others what you have learned. Roadshow it. Make it accessible. Show your group that this is how you work now and that they can get involved with the right support, tools.

Research Today

- Centralized research team
- Embedded research managers
- Holistic research strategy
- Strategy per research project
- Refined processes (*still iterating*)
- Bi-weekly share out sessions
- Growing toolset of methods, tools





Research – creating a sustainable practice

2

Sense Making – tools (of many) to get you started

3

Co-Creation – workshop caveats, learnings

4

Prioritization – aligning teams to a targeted goals

5

Realization – following through to service launch

2

Uncovering Meaning with SD Tools

Optimizer
The Planner

2. PROBLEMS / PAINS

Which problems do you solve for your
There could be more than one
eg. existing sold solution
a good investment (1).

TOO MANY
POINTS FOR
COMPARISON

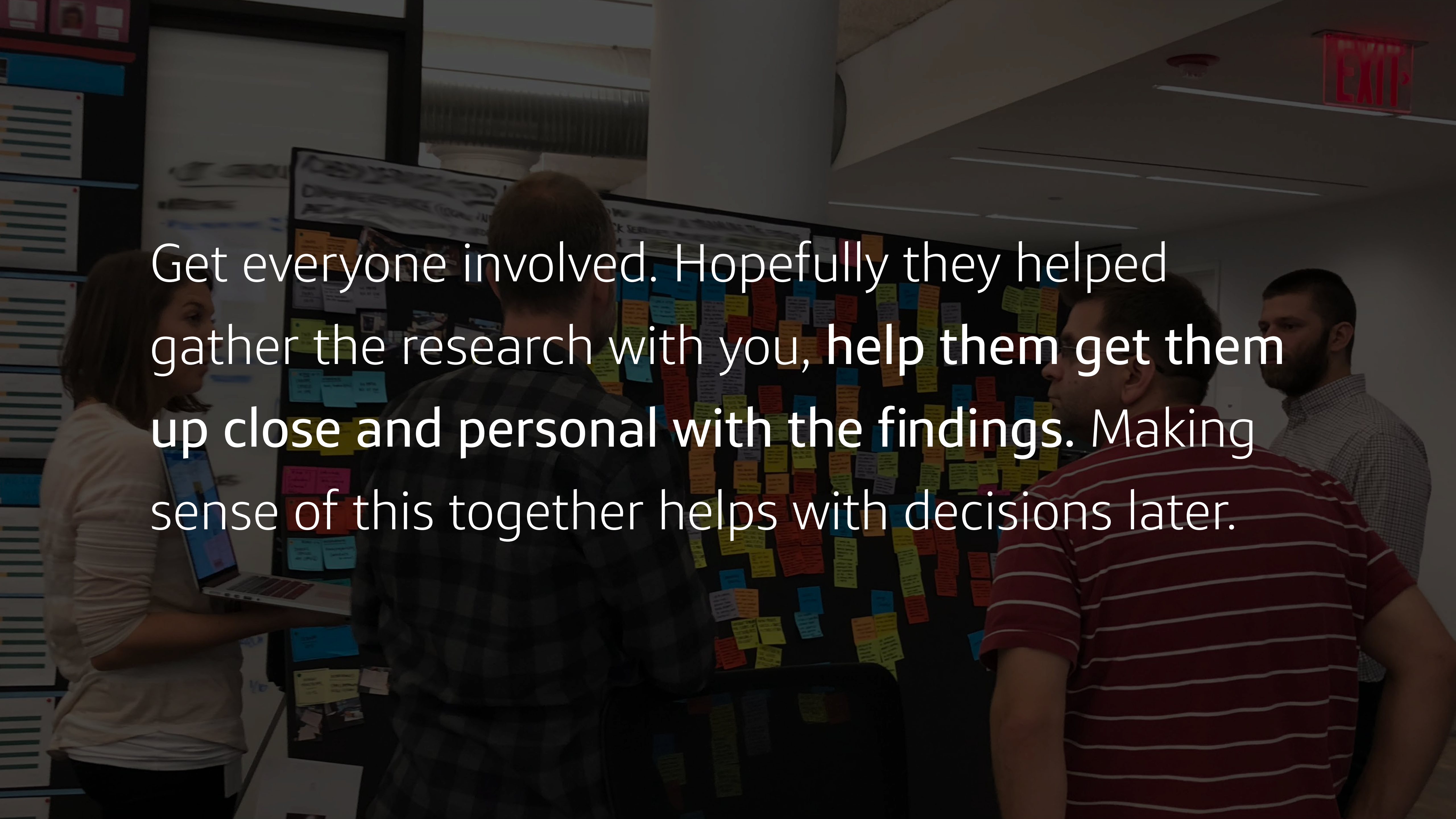
Hard to
coordinate
for

TOO MANY
TABS

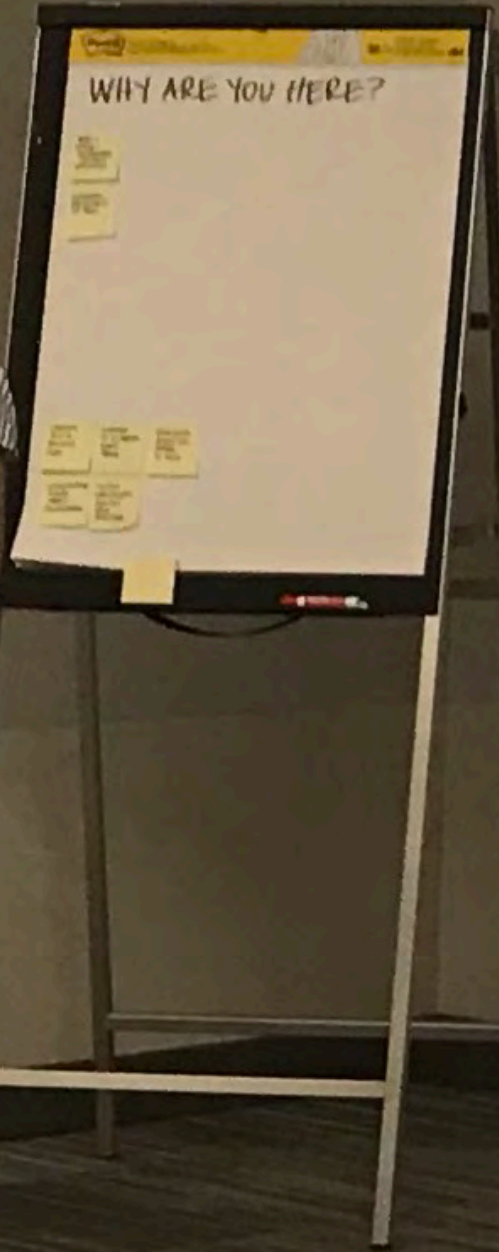
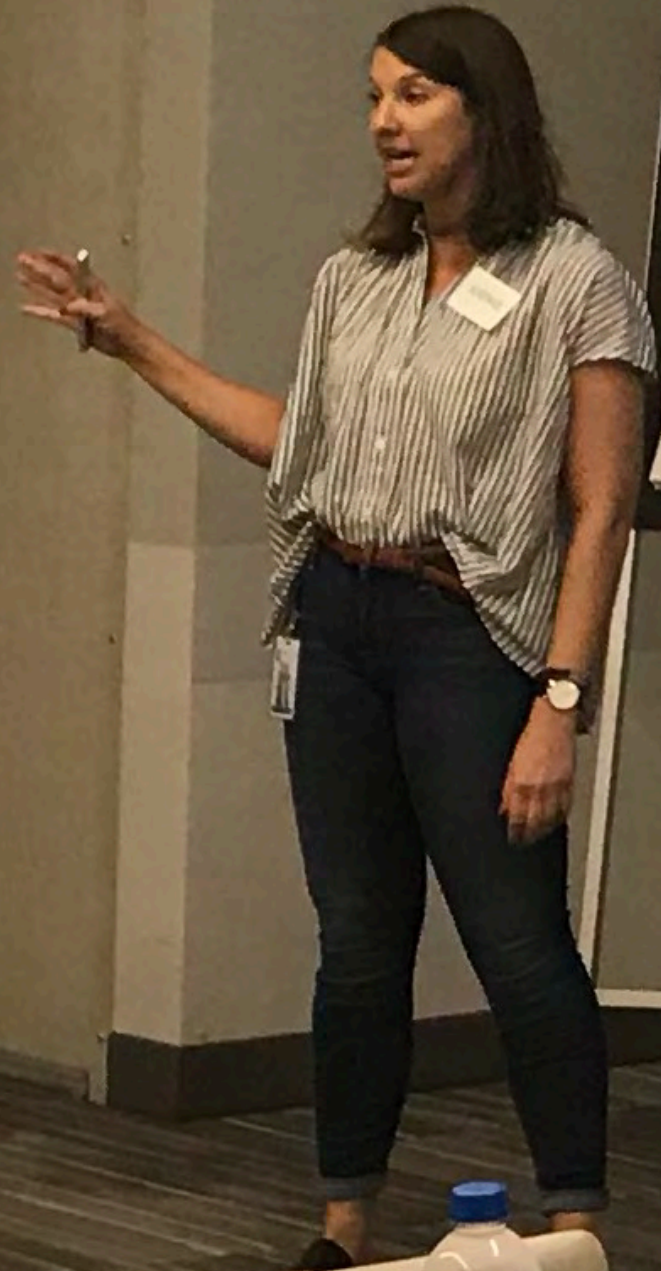
| Making Sense of Findings with Service Design Tools

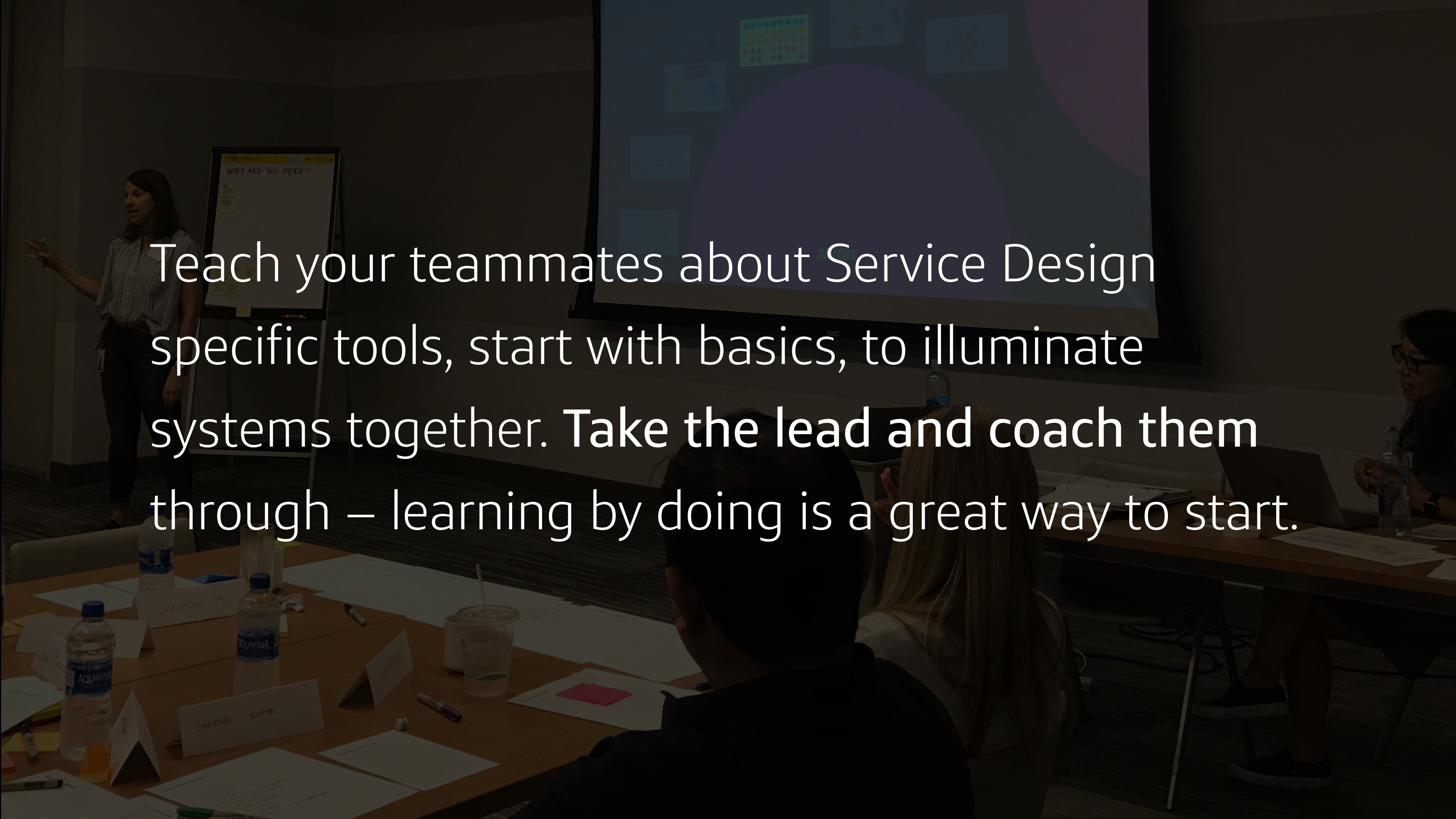
We taught people **what to do with the inputs** they had gathered. How they could **use them** to better understand not just how to build something but what to build. We **include all partners** in synthesis and sense making.



A group of four people are gathered in a meeting room, looking at a large wall covered in colorful sticky notes. The room has a whiteboard and an exit sign. The text is overlaid on the image.

Get everyone involved. Hopefully they helped gather the research with you, help them get them up close and personal with the findings. Making sense of this together helps with decisions later.

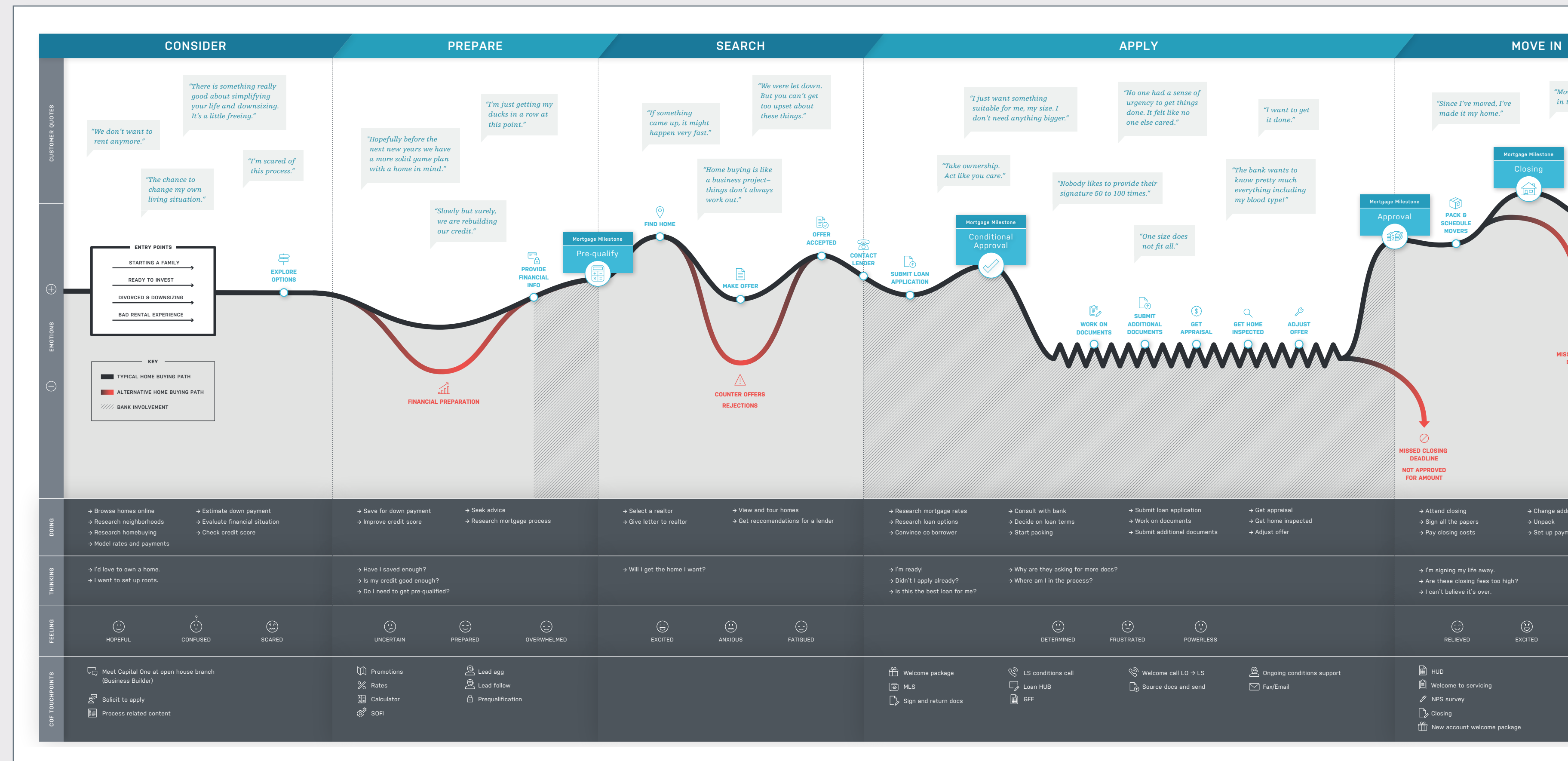


A woman in a striped shirt stands at the front of a meeting room, gesturing towards a large projector screen. The screen displays a diagram with several colored boxes. To her left is a whiteboard with the text "WHY ARE YOU HERE?". In the foreground, several people are seated at a long table, looking towards the presenter. The table is cluttered with papers, water bottles, and a coffee cup. The room is dimly lit, with the primary light source being the projector screen.

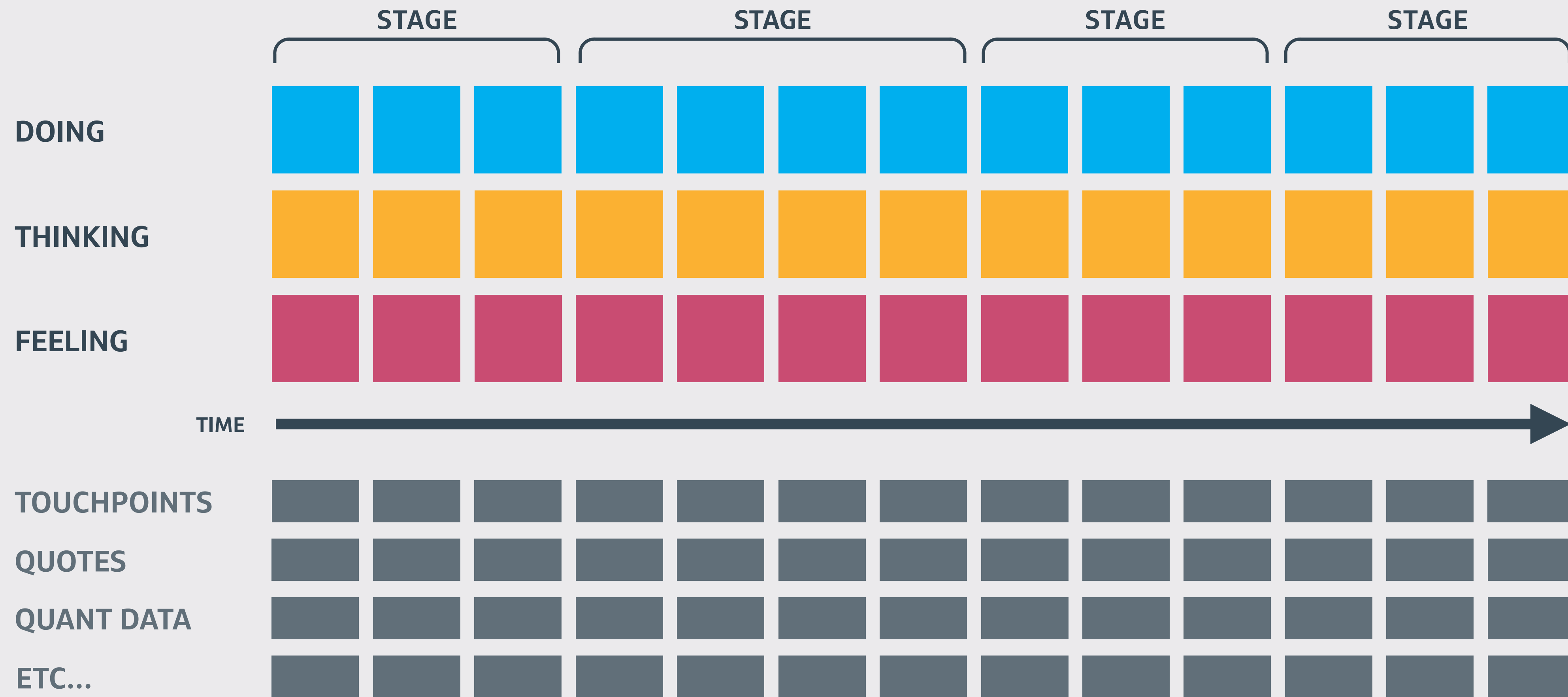
Teach your teammates about Service Design specific tools, start with basics, to illuminate systems together. Take the lead and coach them through – learning by doing is a great way to start.

Experience Map

An Experience Map depicts a person's experience with a product or service over time.

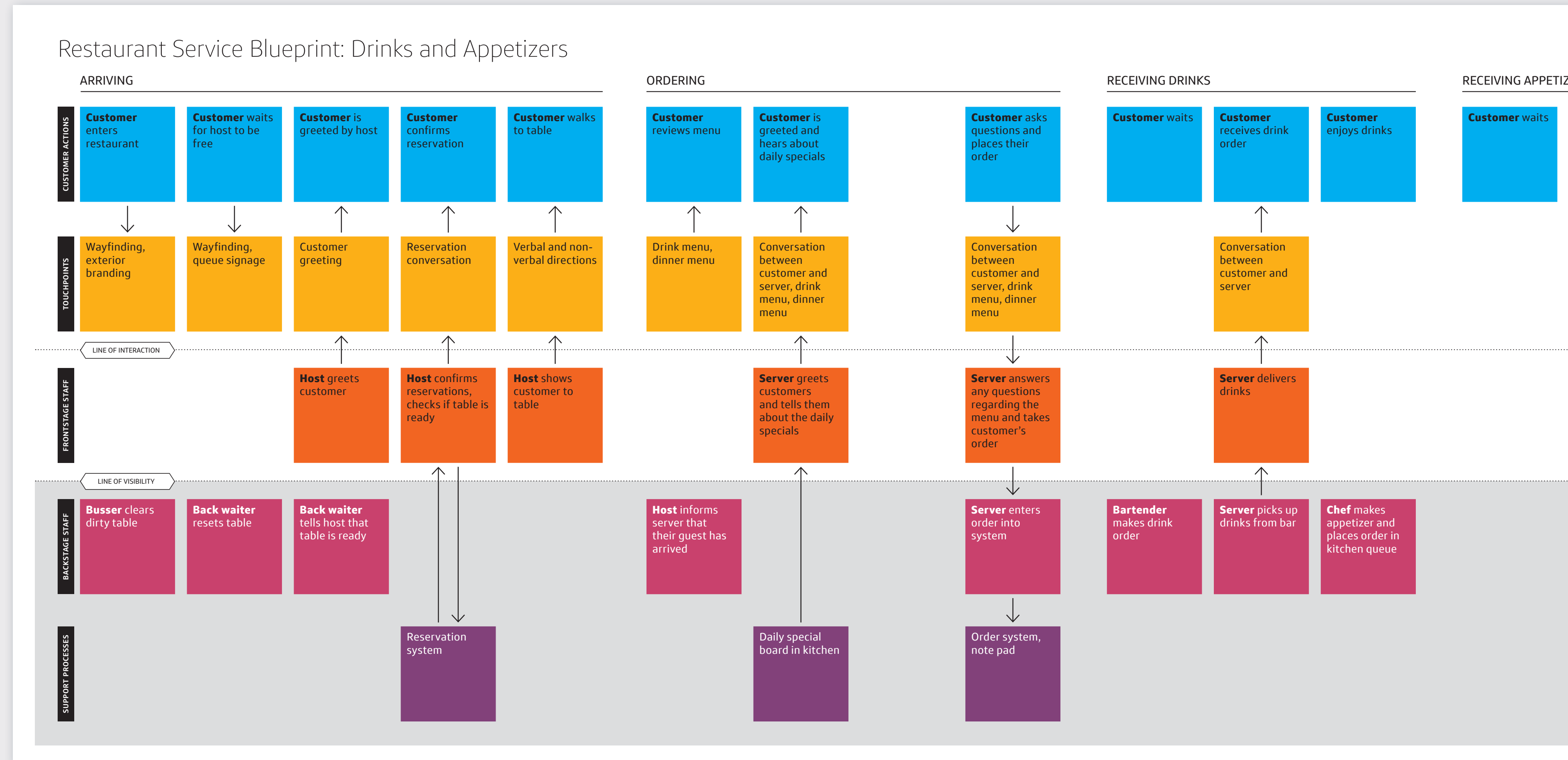


The anatomy of an Experience Map

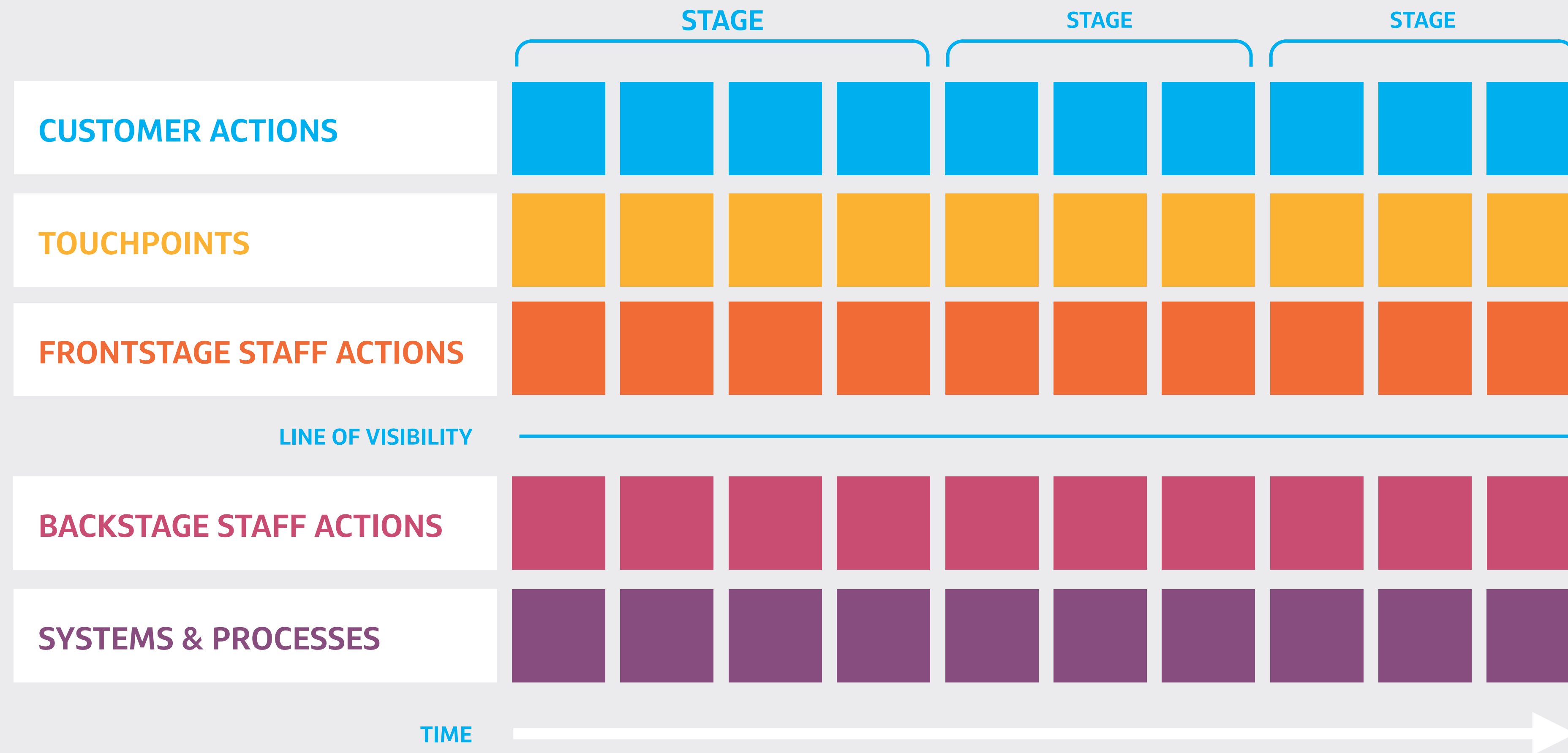


Service Blueprint

A blueprint is an operational tool that shows how people, **processes,** and **technologies** are orchestrated to deliver a service.



Anatomy of a Service Blueprint

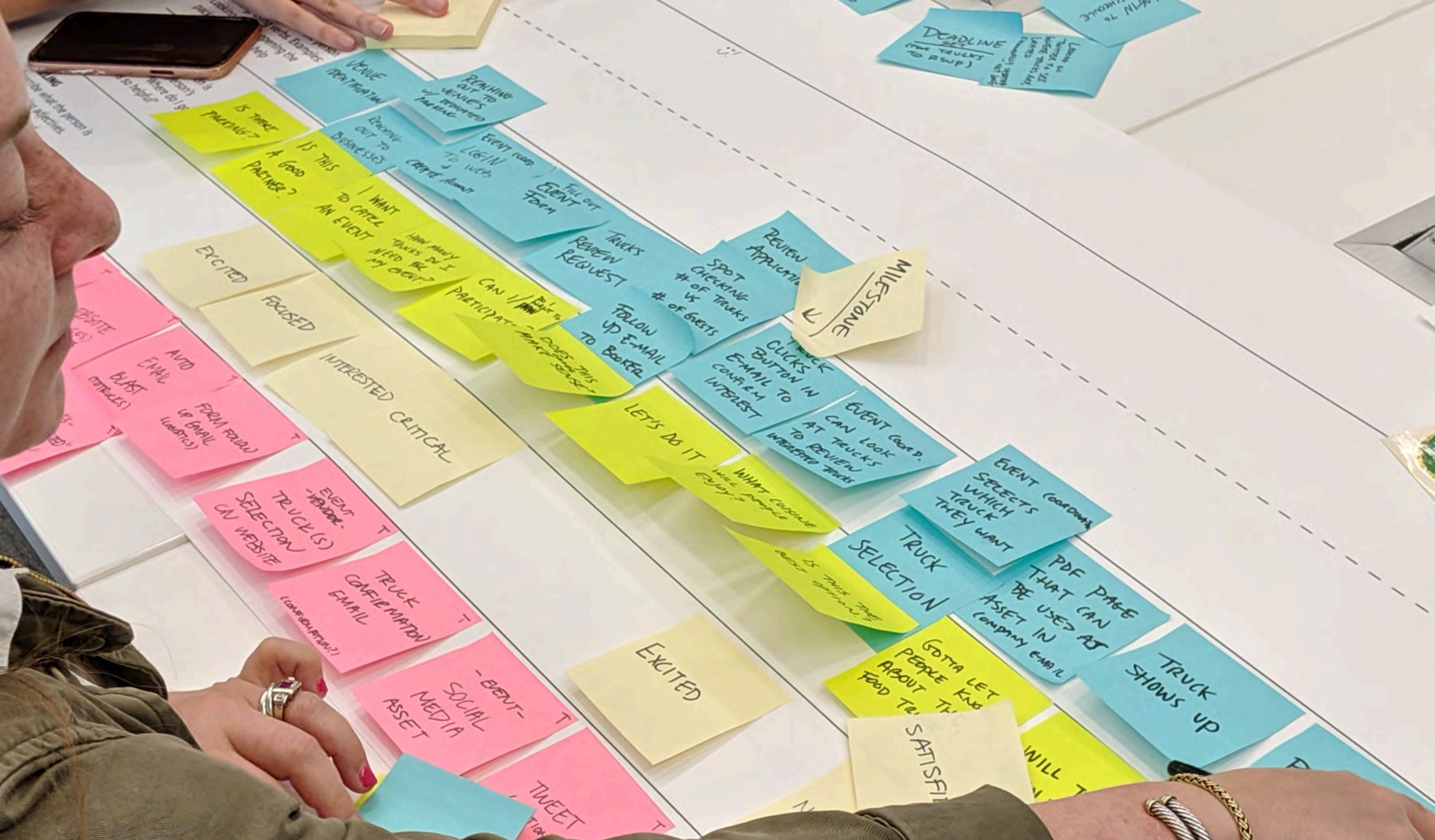




Experience Map

Low-Fi Experience Map Example

DOING	THINKING	FEELING
SEEKING OUT COURSE	CREATING A SCHEDULE	FEELING CONFIDENT
OPEN ENROLL	STARTING COURSE	FEELING OVERWHELMED
ENROLLING IN COURSE	STARTING COURSE	FEELING CONFIDENT
STARTING COURSE	STARTING COURSE	FEELING CONFIDENT



It is critical for this discussion around content (change due to follow) to offer to make the most of your time with your guest organization when you are expert, consider sharing a few of these questions:

What are your goals for this project? (What are you trying to achieve?)

How do you define success for this project? (What are the key metrics?)

What are the key stakeholders for this project? (Who are the key players?)

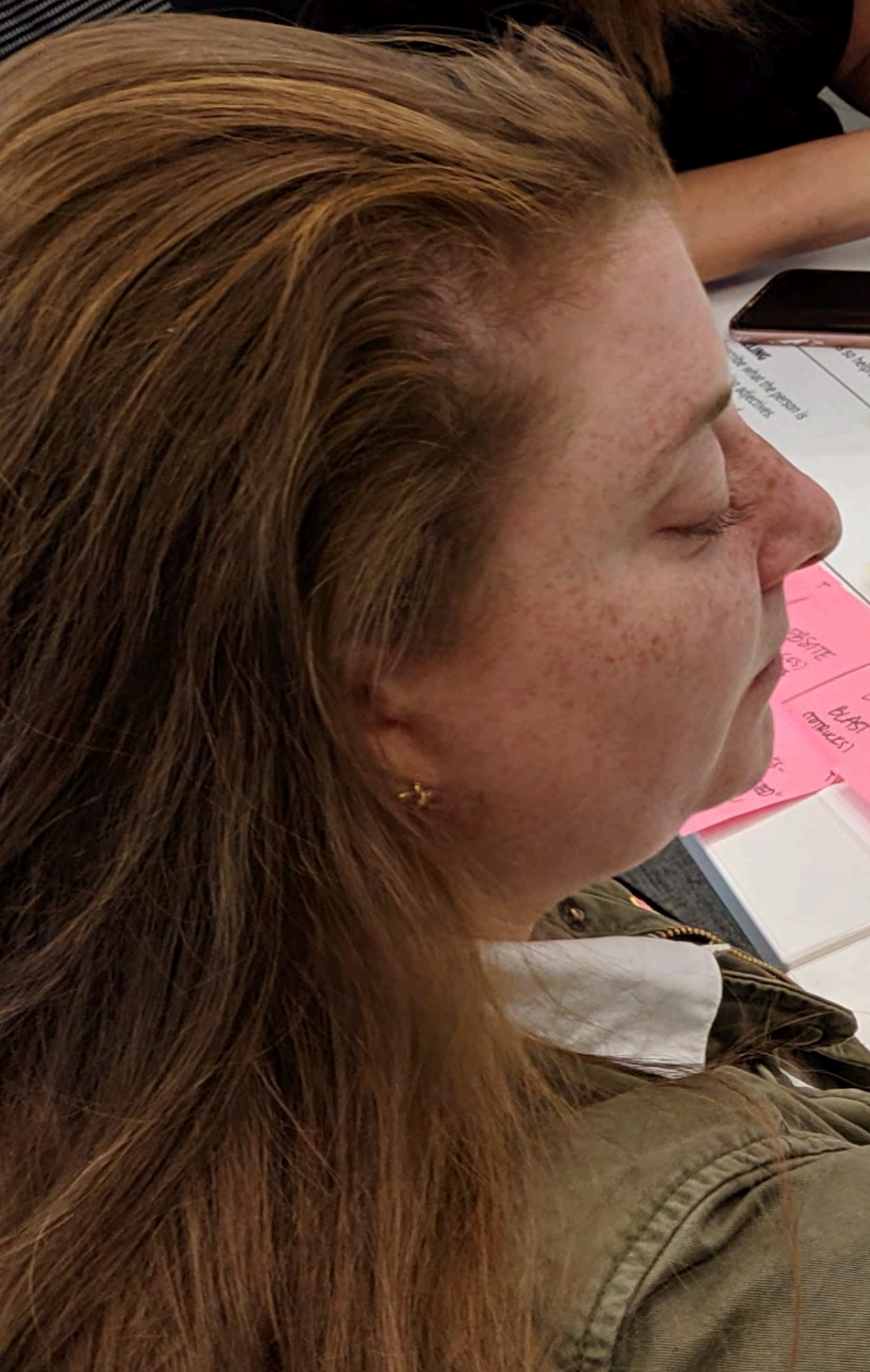
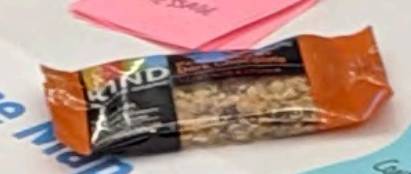
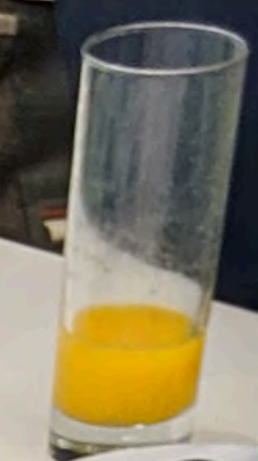
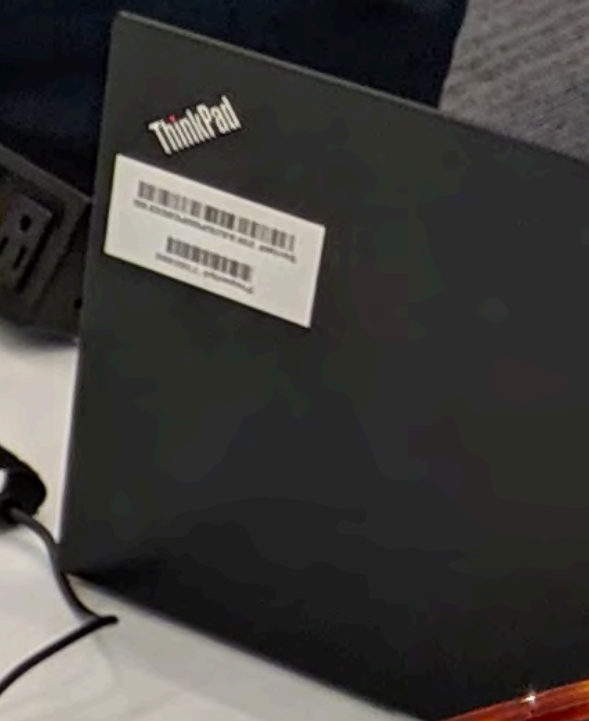
What are the key risks for this project? (What are the potential pitfalls?)

What are the key dependencies for this project? (What are the key dependencies?)

What are the key resources for this project? (What are the key resources?)

What are the key challenges for this project? (What are the key challenges?)

What are the key opportunities for this project? (What are the key opportunities?)







Use those tools to visualize your learnings to get yourselves to the next phase of work. Get everyone up and in making together – start out rough and refine. *ie. experience map, service blueprints...*

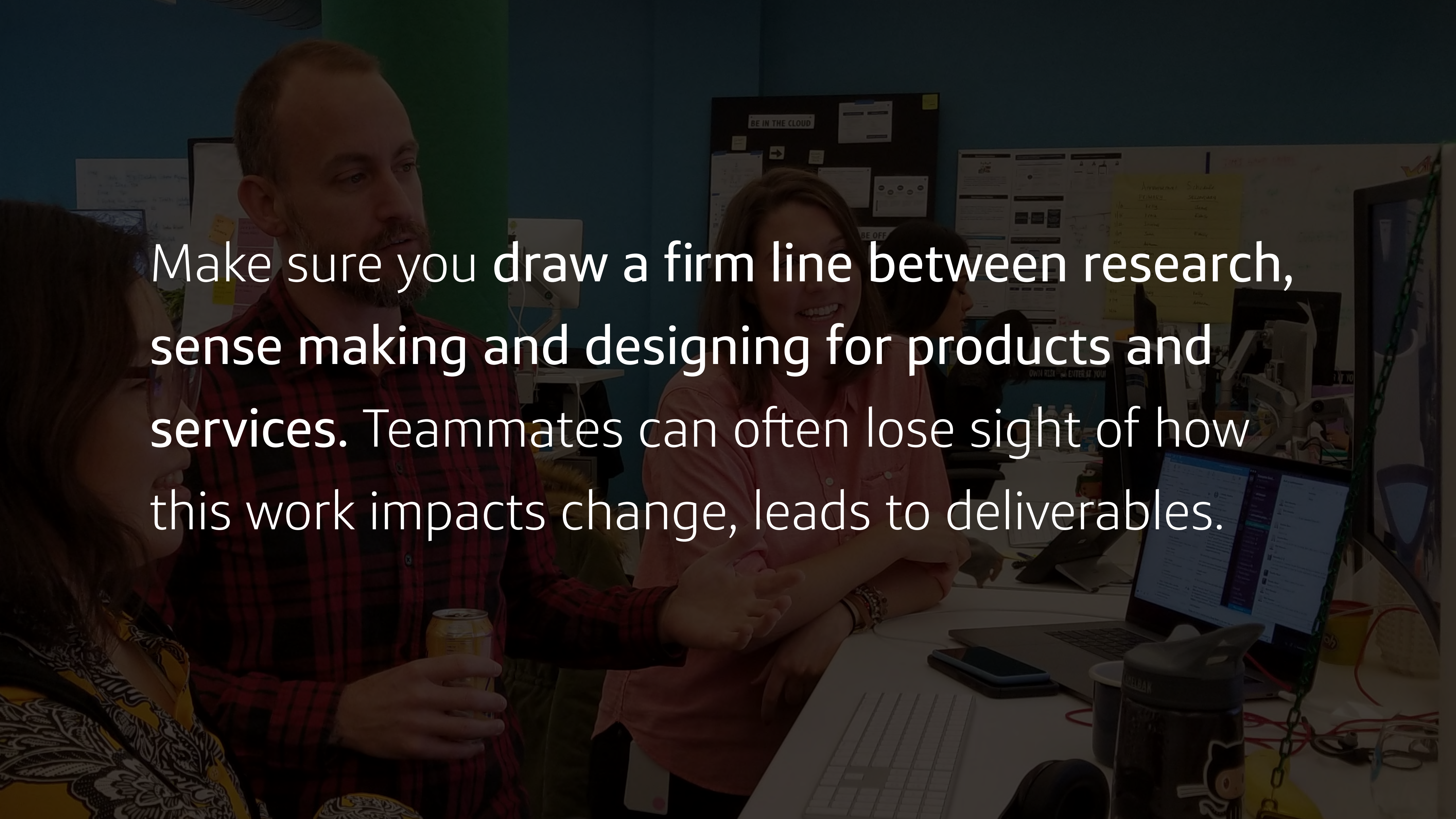


BE IN THE CLOUD

BE OFF

OWN RISK ENTER AT YOUR OWN RISK

APPROXIMATE	SCHEDULE
1/10	Kelly
1/11	Yana
1/12	Stina
1/13	Sun
1/14	Adam
1/15	Shu
1/16	Wendy
1/17	Andy
1/18	Rally
1/19	Adam



Make sure you draw a firm line between research, sense making and designing for products and services. Teammates can often lose sight of how this work impacts change, leads to deliverables.

Sense Making Today

- Office is covered in post-its, maps
- Each team has their own space
- There are a handful of trainings
- Teams regularly share mappings
- Connections are being drawn
- We are more deeply understanding
- We are addressing true human needs





Research – creating a sustainable practice



Sense Making – tools (of many) to get you started



Co-Creation – workshop caveats, learnings



Prioritization – aligning teams to a targeted goals



Realization – following through to service launch

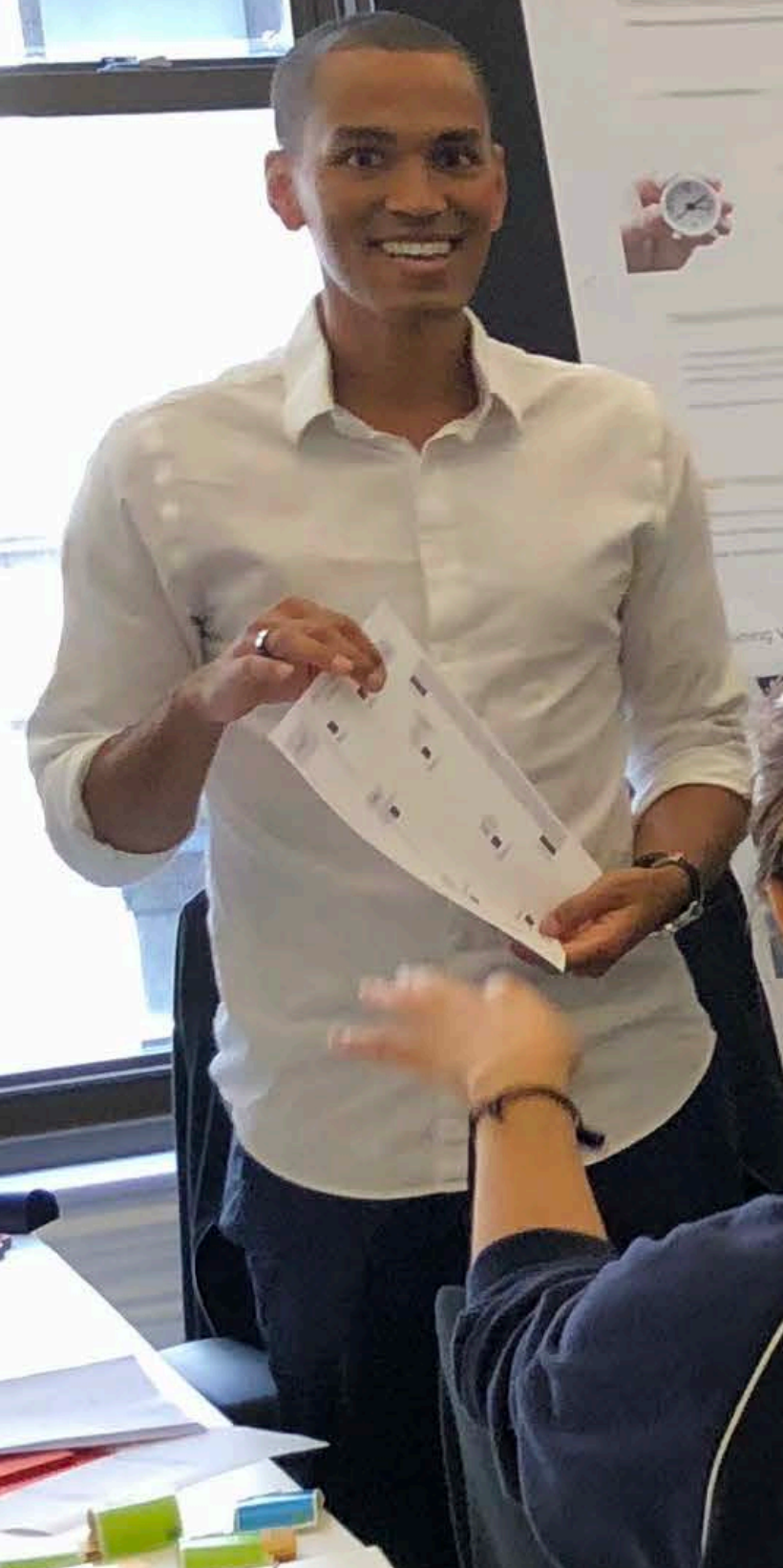


3 Designing for a Workshop

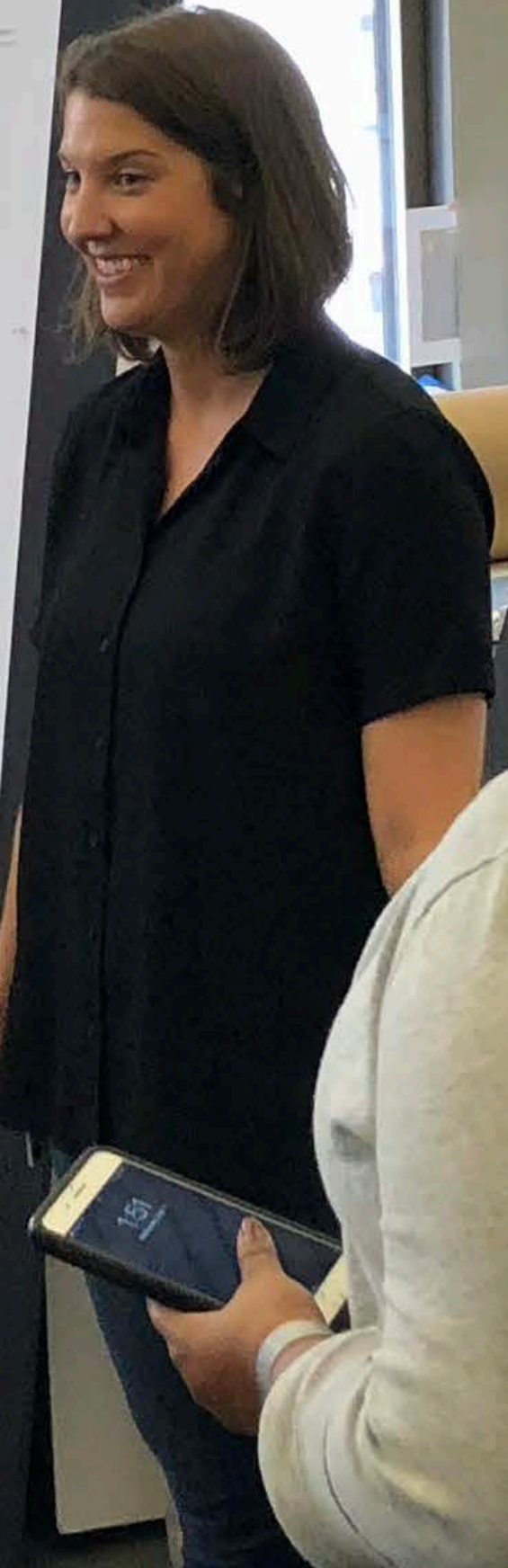
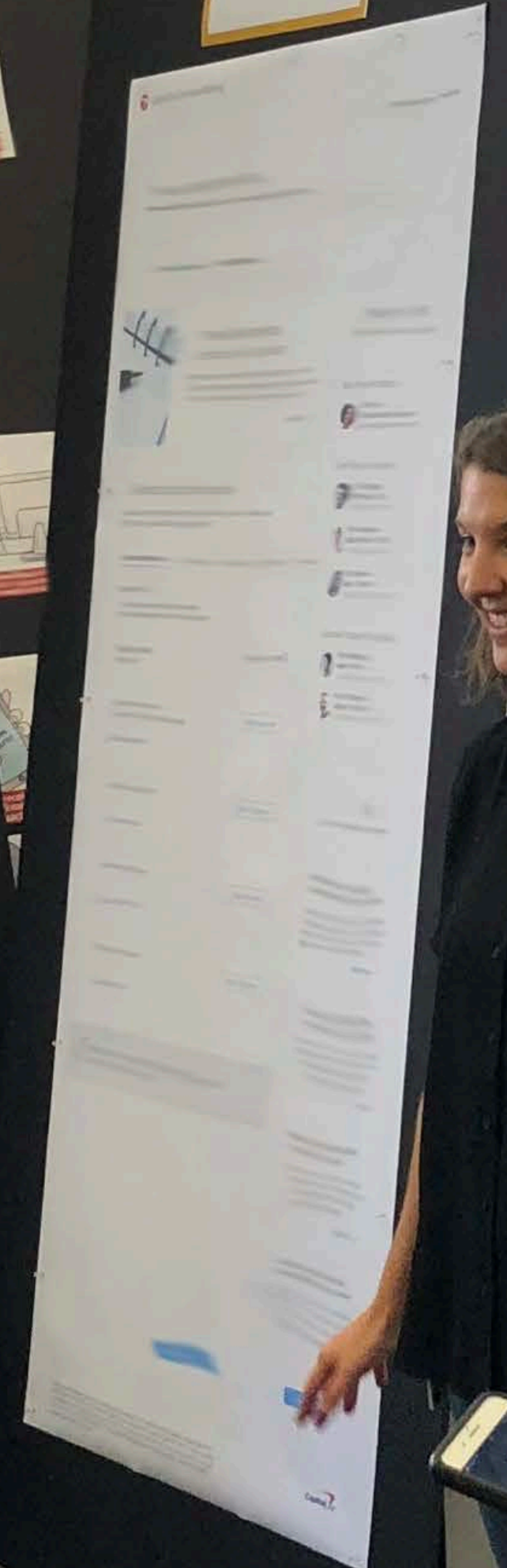
| Designing for Workshops, like we design for anything else

Our teams have hosted a ton of workshops over the years. We have taught them that **the most successful ones have been thoughtfully planned out** – they are not just about getting the right people in the room. Structure is key for outcomes.

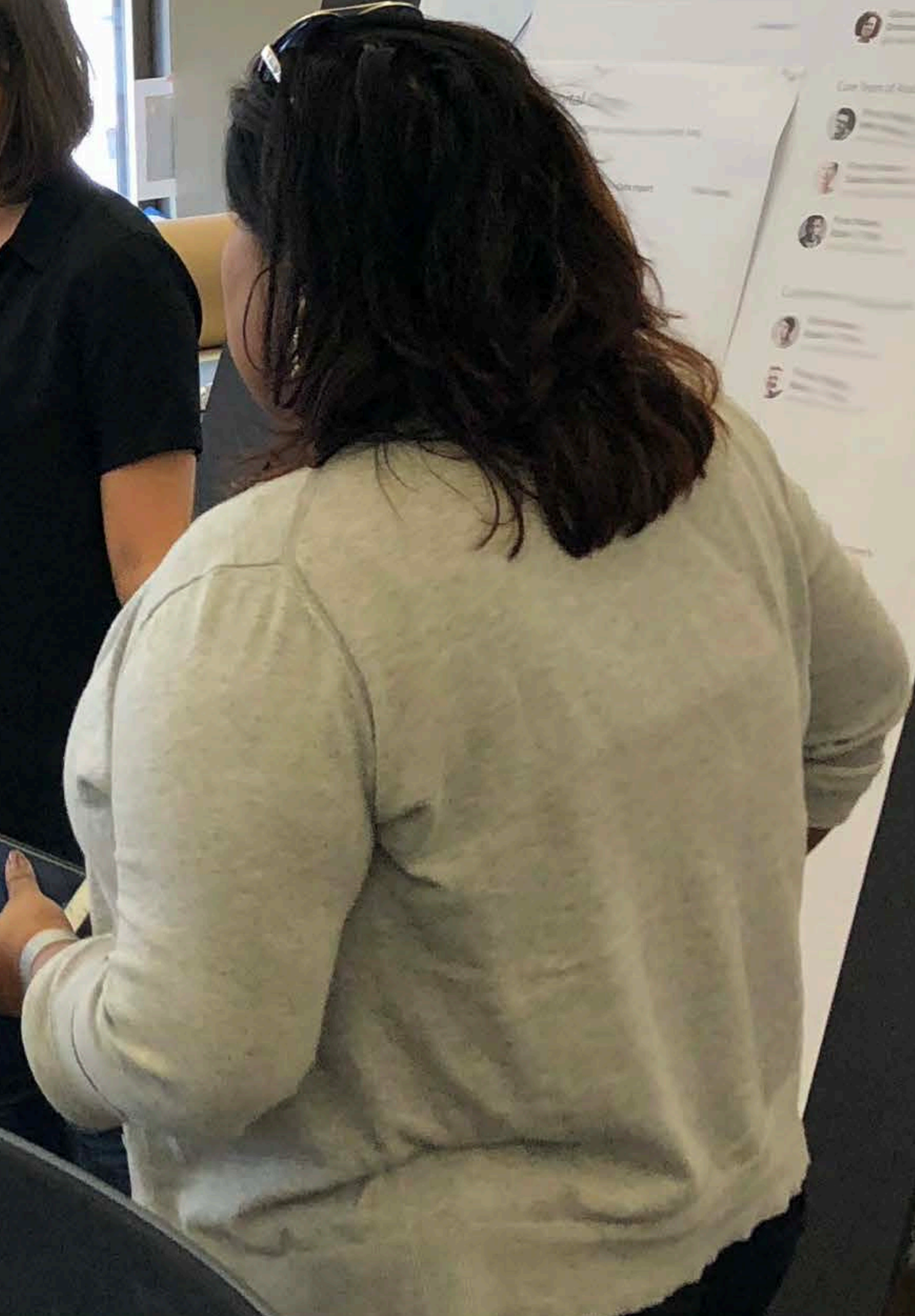
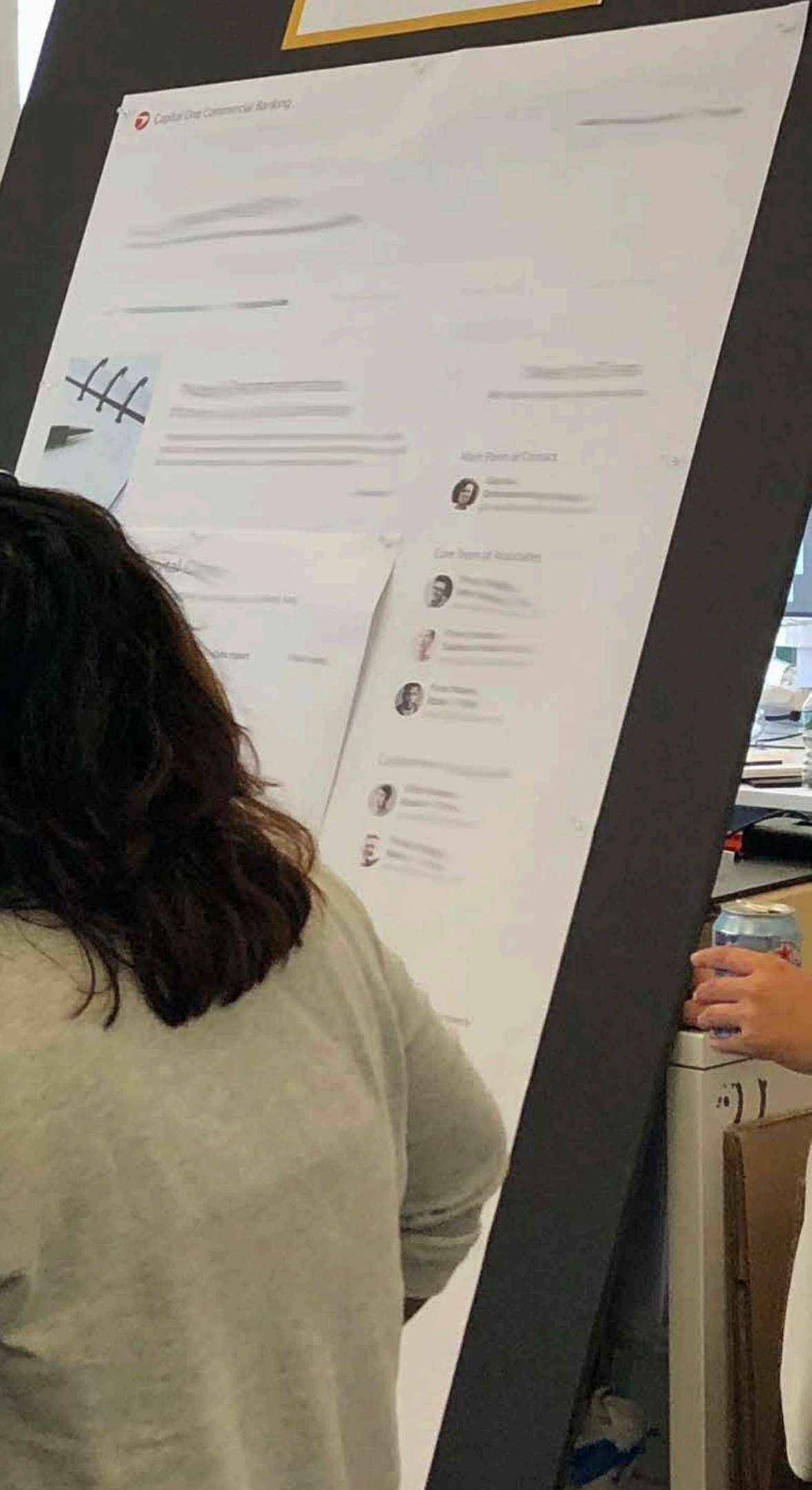
STATION
5

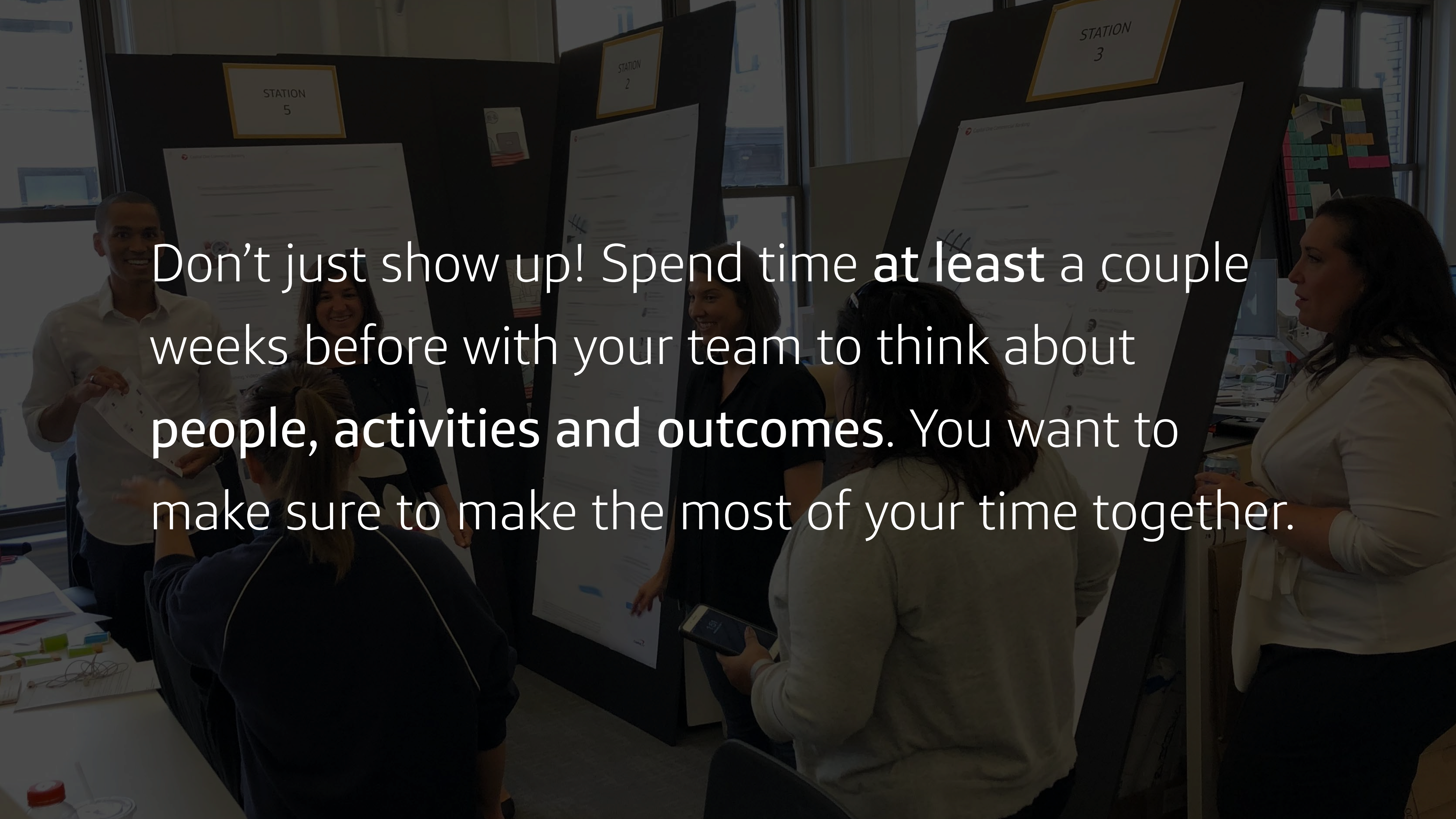


STATION
2



STATION
3



A group of people are gathered in a meeting room, looking at large documents on easels. The easels are labeled "STATION 2", "STATION 3", and "STATION 5". The documents appear to be project plans or reports. The people are engaged in discussion and looking at the documents. The room has large windows in the background.

Don't just show up! Spend time **at least** a couple weeks before with your team to think about **people, activities and outcomes**. You want to make sure to make the most of your time together.

nal Inputs

Inspirational Inputs

PARKING LOT

BRANCHLESS BANKING IDEATION

9:00 AM WARM UP (SETTING THE STAGE)
 9:30 AM OPTING (PARENTS, OPPORTUNITY SPACE)
 10:30 AM OPPORTUNITY SPACE DISCUSSION
 11:00 AM PROBLEM ATTRIBUTES, STATEMENTS
 11:15 AM BREAK (15 MINS)
 11:30 AM INDIVIDUAL REFLECTION, IDEATION/
 11:40 AM CLUSTERING IDEAS, IDENTIFYING THEMES
 12:00 PM LUNCH (1 HOUR)
 1:00 PM BREAK, DISCUSS MORE IDEATION/
 1:45 PM MAPPING CONCEPTS ON BOARD
 2:00 PM IDEATION OF TEAM CONCEPT POSTERS
 2:30 PM BREAK (15 MINS)
 2:45 PM TOP 30 PRESENT, REVISE TEAM CONCEPTS
 3:45 PM TOP 30 REVEALING, DOT VOTE ELEMENTS
 4:00 PM WINDUP, NEXT STEPS

THANK YOU!

RULES FOR IDEATION

- 🚫 DEFER JUDGEMENT
- 🗨️ GO FOR QUANTITY
- 🏗️ BUILD ON OTHERS' IDEAS
- 🎨 BE VISUAL
- 🤪 THINK WILDLY!

HOW TO CRITIQUE

ASK YOURSELF + GET CLARIFICATION

- WHAT ARE THE OBJECTIVES OF THE CONCEPT?
- WHAT ARE THE RELATED ELEMENTS?
- ARE THEY EFFECTIVE IN ACHIEVING OBJECTIVES?
- WHY OR WHY NOT?

DISCUSS AVOID PROBLEM SOLVING



Start high level and then get specific with the agenda – section the day based end of day goals. What participants will need to get there?
ie. context setting, reflection, ideation, next steps

nal Inputs

Inspirational Inputs

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BRANCHLESS BANKING IDEATION

RULES FOR IDEATION

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12m 36s

12m 36s

INPUTS

- 1. ...
- 2. ...
- 3. ...
- 4. ...
- 5. ...
- 6. ...
- 7. ...
- 8. ...
- 9. ...
- 10. ...

RULES FOR IDEATION

- 1. ...
- 2. ...
- 3. ...
- 4. ...
- 5. ...
- 6. ...
- 7. ...
- 8. ...
- 9. ...
- 10. ...

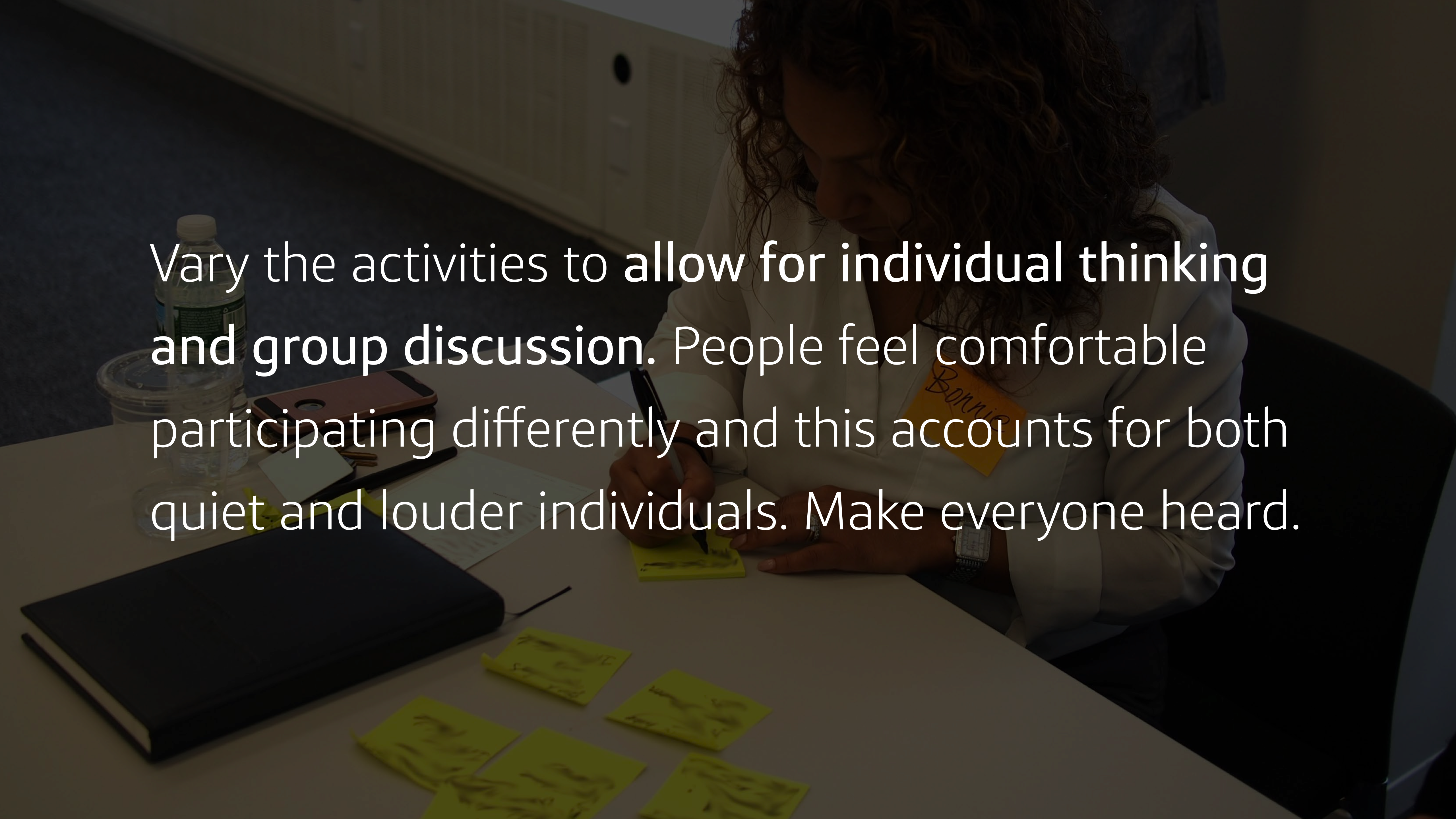
INPUTS

- 1. ...
- 2. ...
- 3. ...
- 4. ...
- 5. ...
- 6. ...
- 7. ...
- 8. ...
- 9. ...
- 10. ...

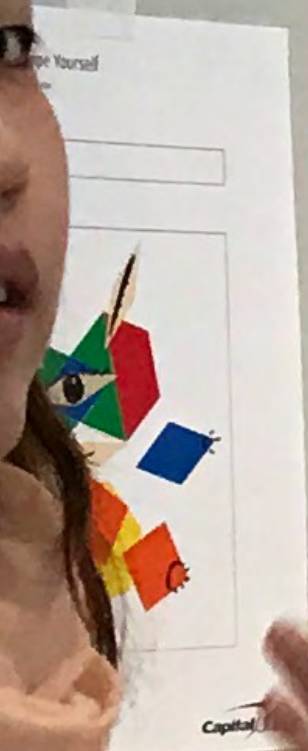
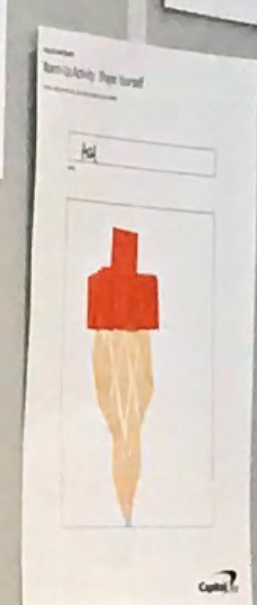
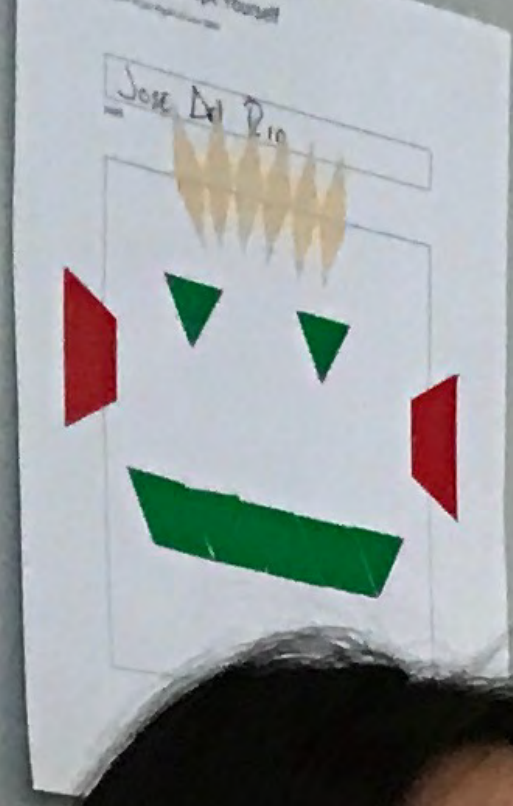


Make sure you **have a facilitator** whether it is you or someone else. The facilitator is *not* there to share their big idea, but to move conversations along, ask questions, pivot activities as needed...





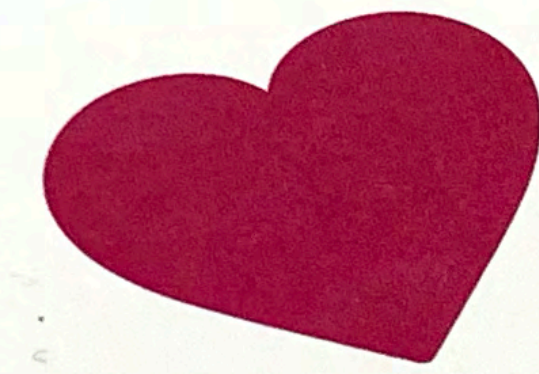
Vary the activities to **allow for individual thinking and group discussion**. People feel comfortable participating differently and this accounts for both quiet and louder individuals. Make everyone heard.





Conversation Facilitator

You are responsible for guiding conversation throughout the session – making sure everyone is heard, keeping the team on track and, helping with time keeping



Feeling Documenter

You are responsible for making sure the "Feeling" swimlane is documented on post-its and comprehensive – you should help the facilitator probe around feelings.



Thinking Documenter

You are responsible for making sure the "Thinking" swimlane is documented on post-its and comprehensive – you should help the facilitator probe around thoughts.



Doing Documenter

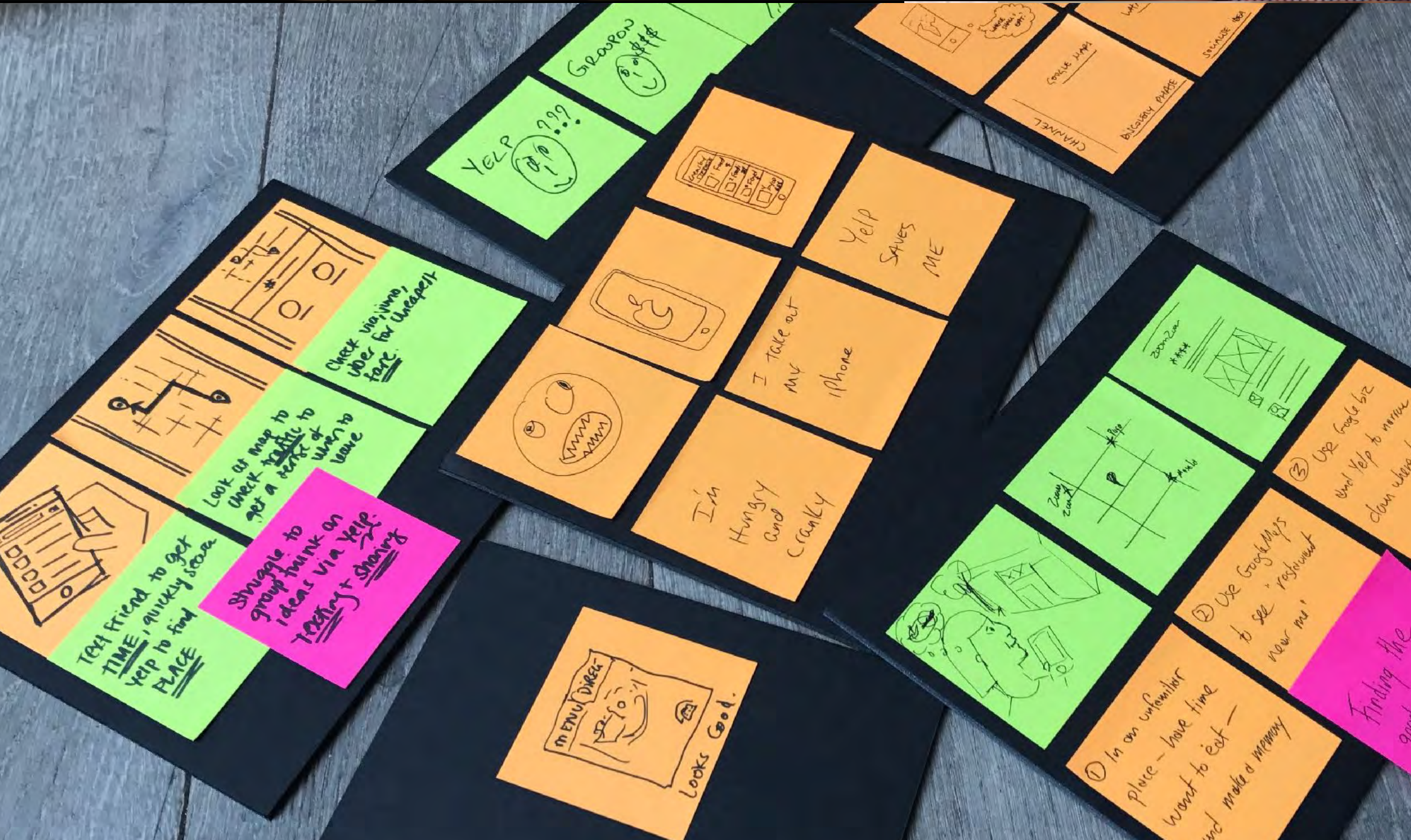
You are responsible for making sure the "Doing" swimlane is documented on post-its and comprehensive – you should help the facilitator probe around actions.



Touchpoints, Sparkline

You are responsible for making sure Touchpoints are documented post-its and drawing the emotional line, or sparkline, once the team has completed their experience







Design your activities thoughtfully around your goals. Is there a more creative way you can get results outside of just talking? Prototyping? Lego for Serious Play? Dot Voting? Service storming?

Co-Creation Today

- Thoughtfulness around planning
- All disciplines involved in process
- Semi-regular sessions within org
- Teammates have boom much closer
- Better understanding across teams
- Silos are being broken down
- We can get **a lot** done in a short time





Research – creating a sustainable practice



Sense Making – tools (of many) to get you started



Co-Creation – workshop caveats, learnings



Prioritization – aligning teams to a targeted goals



Realization – following through to service launch

A wide-angle landscape photograph of a mountain range. The foreground shows a valley with a river winding through it. The mountains in the distance are layered and appear hazy, suggesting a vast, open space. The sky is a deep, dark blue, indicating either dawn or dusk. The overall mood is serene and expansive.

The next frontier...

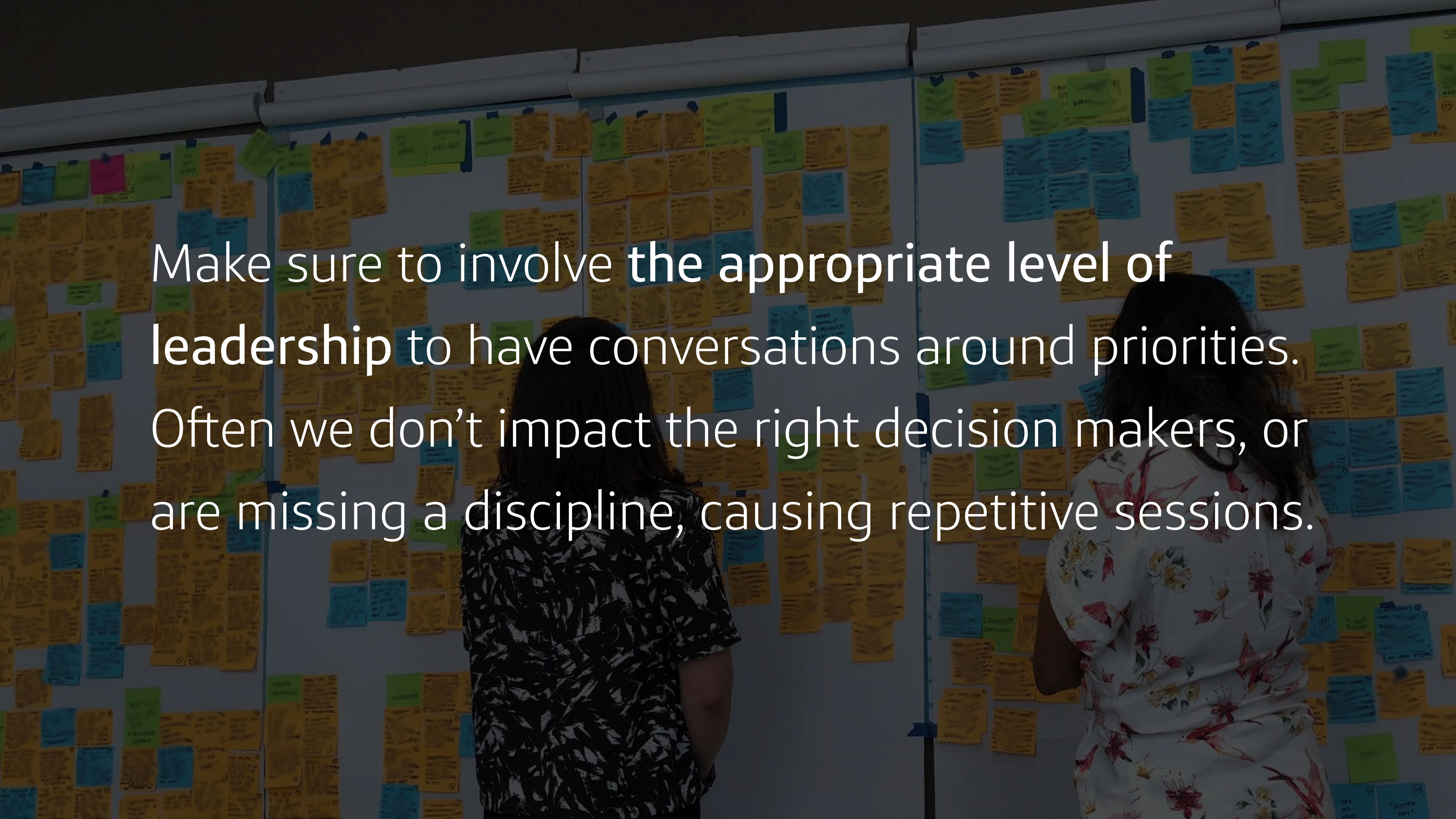


4 Focusing on the Right Things

| Focusing on the Right Things

We are able to do this when it comes to each project but as a larger organization **we struggle with aligning more than one team to a goal** because of this we move a little bit slow than we could if we were to swarm on horizontal priorities.



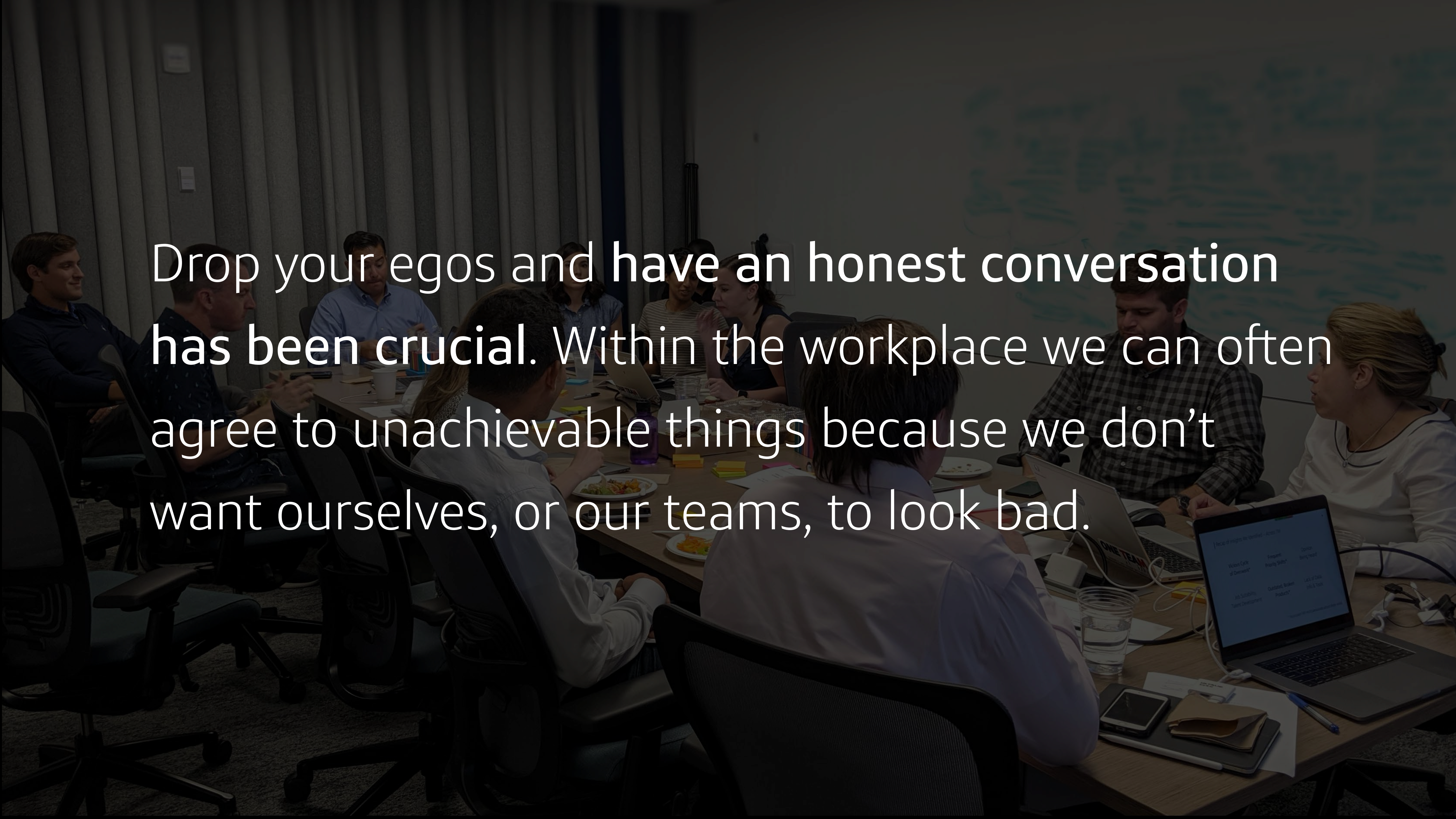
A photograph of two women standing in front of a large wall covered in numerous colorful sticky notes (yellow, blue, green, pink). The women are seen from behind, looking at the wall. The woman on the left is wearing a black and white patterned dress, and the woman on the right is wearing a white dress with a floral pattern. The scene is dimly lit, with the text overlaid in white.

Make sure to involve **the appropriate level of leadership** to have conversations around priorities. Often we don't impact the right decision makers, or are missing a discipline, causing repetitive sessions.



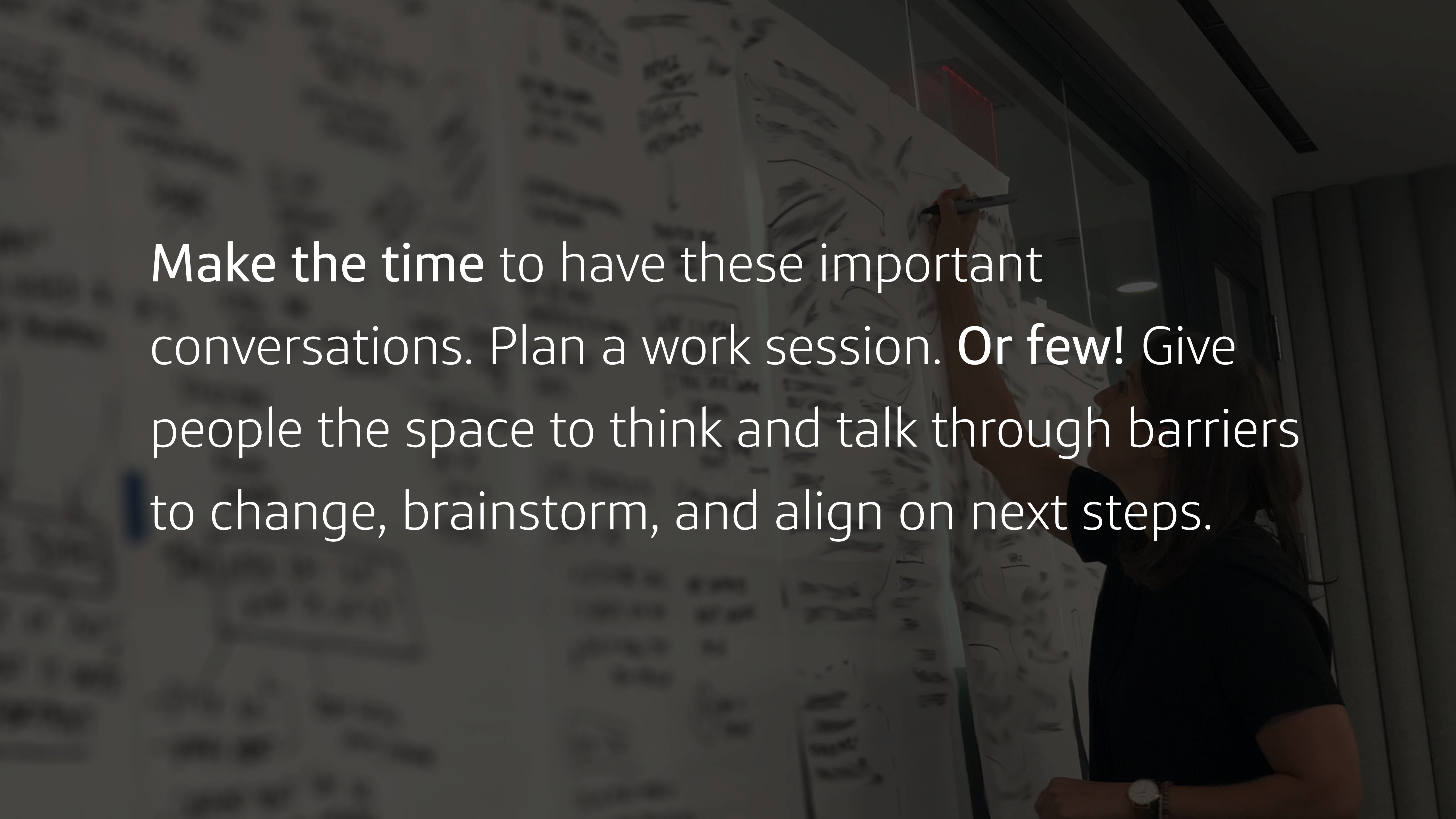
Recap of insights identified - Across the

Vicious Cycle of Obsolescence	Frequent Priority Shifts	Concave Being 'read'
Job Sustainability / Talent Development	Outdated Broken Products	Lack of Data Infr. & Tools

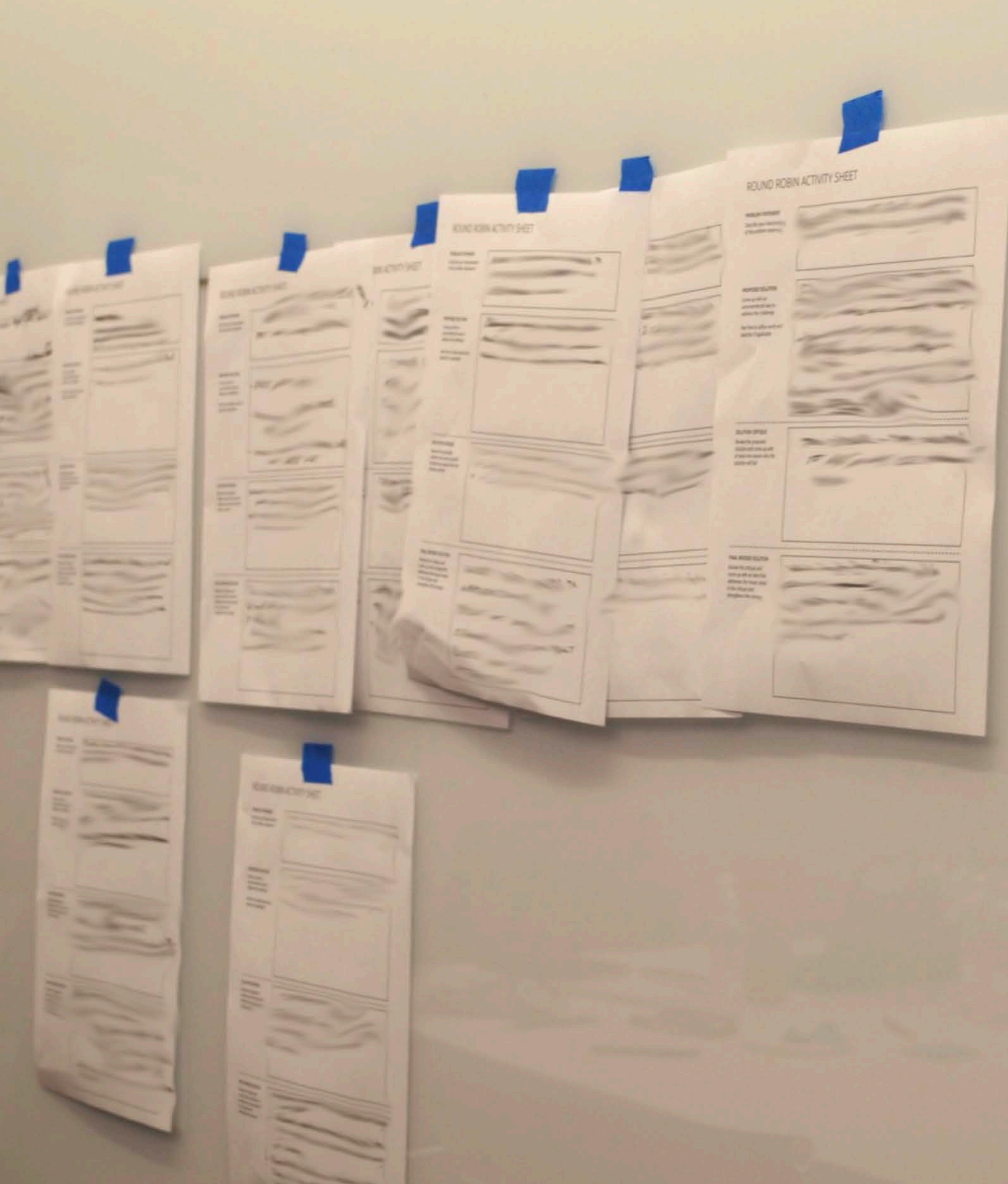
A group of approximately ten people are seated around a large conference table in a meeting room. They are engaged in a discussion, with some looking at laptops and others at each other. The room has vertical blinds in the background and a whiteboard on the right. The text is overlaid in white on a dark, semi-transparent background.

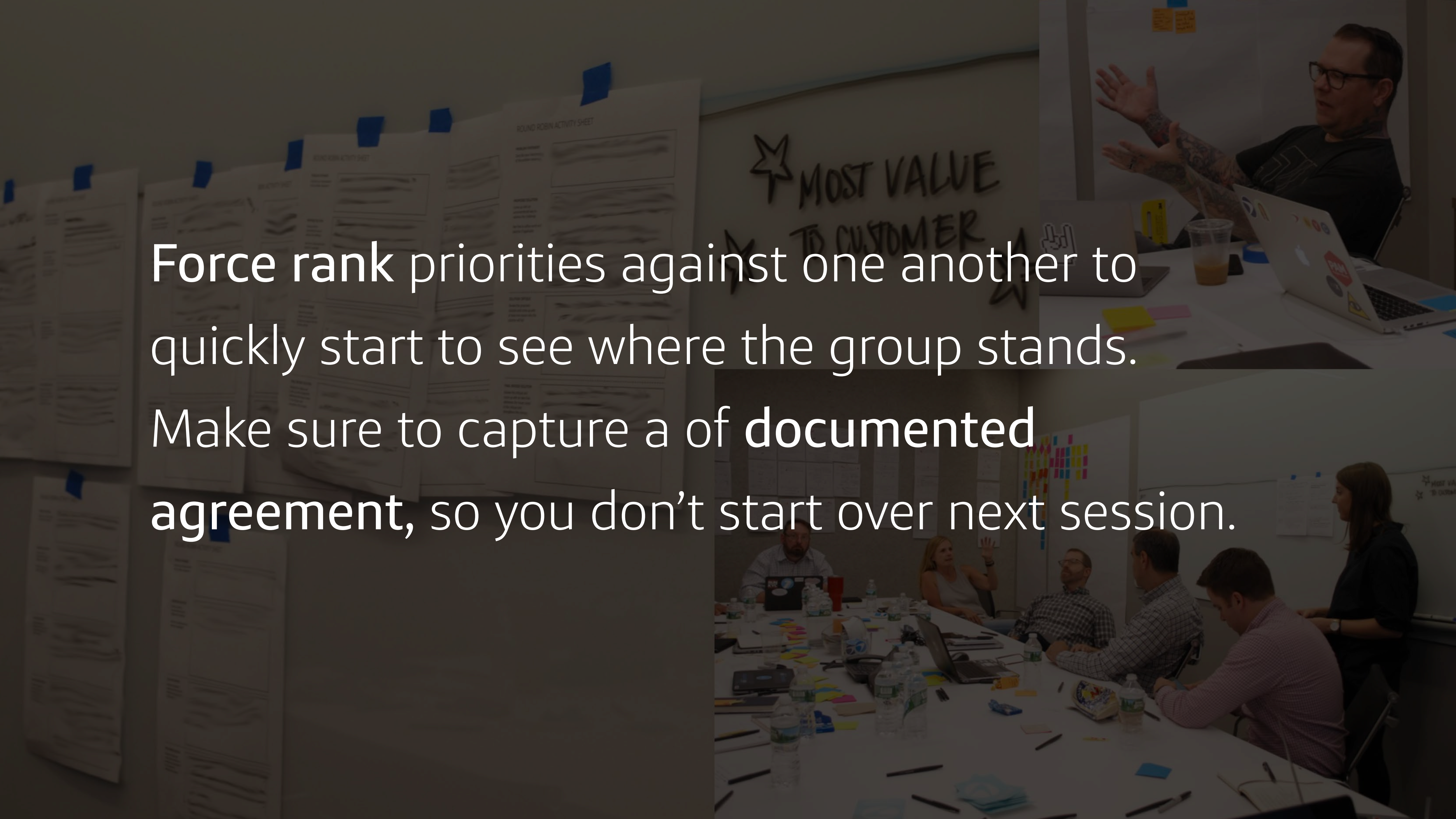
Drop your egos and **have an honest conversation** has been crucial. Within the workplace we can often agree to unachievable things because we don't want ourselves, or our teams, to look bad.



A person is seen from the side, writing on a large whiteboard in a meeting room. The whiteboard is covered with handwritten notes and diagrams. The person is wearing a dark shirt and a watch. The room has a modern, professional feel with a glass wall in the background.

Make the time to have these important conversations. Plan a work session. **Or few!** Give people the space to think and talk through barriers to change, brainstorm, and align on next steps.





Force rank priorities against one another to quickly start to see where the group stands. Make sure to capture a of **documented agreement**, so you don't start over next session.

CONCEPT NAME [Blue sticky note]

PROBLEM BEING ADDRESSED [Blue sticky note]

CONCEPT IN ACTION (STORY BOARD)

[Pink sticky note]	[Pink sticky note]	[Pink sticky note]
[Pink sticky note]		

RISKS / BARRIERS

[Pink sticky note] [Orange sticky note] [Orange sticky note]

How MANAGING

KEY BENEFITS / OBJECTIVES

[Orange sticky note] [Pink sticky note]

[Pink sticky note] [Orange sticky note]

HOW SUCCESS MEASURED

[Orange sticky note]

CONCEPT SUMMARY

[Blue sticky note]

CONCEPT NAME [Blue sticky note]

PROBLEM BEING ADDRESSED [Blue sticky note]

CONCEPT IN ACTION (STORY BOARD)

[Blue sticky note]	[Blue sticky note]	[Blue sticky note]
[Blue sticky note]	[Blue sticky note]	

RISKS / BARRIERS

[Blue sticky note] [Yellow sticky note] [Blue sticky note] [Yellow sticky note]

[Yellow sticky note] [Blue sticky note] [Blue sticky note]

[Blue sticky note] [Yellow sticky note]

How MANAGING

KEY BENEFITS / OBJECTIVES

[Blue sticky note] [Blue sticky note]

[Blue sticky note] [Blue sticky note]

HOW SUCCESS MEASURED

[Blue sticky note] [Blue sticky note]

[Blue sticky note] [Blue sticky note]

CONCEPT SUMMARY

[Blue sticky note] [Yellow sticky note]

CONCEPT NAME [Yellow sticky note]

PROBLEM BEING ADDRESSED [Yellow sticky note]

CONCEPT IN ACTION (STORY BOARD)

[Yellow sticky note with drawing]	[Yellow sticky note]	[Yellow sticky note]
[Yellow sticky note]	[Yellow sticky note]	[Yellow sticky note]

RISKS / BARRIERS

[Yellow sticky note] [Yellow sticky note]

[Yellow sticky note] [Yellow sticky note]

How MANAGING

[Yellow sticky note]

KEY BENEFITS / OBJECTIVES

[Yellow sticky note] [Yellow sticky note]

[Yellow sticky note] [Yellow sticky note]

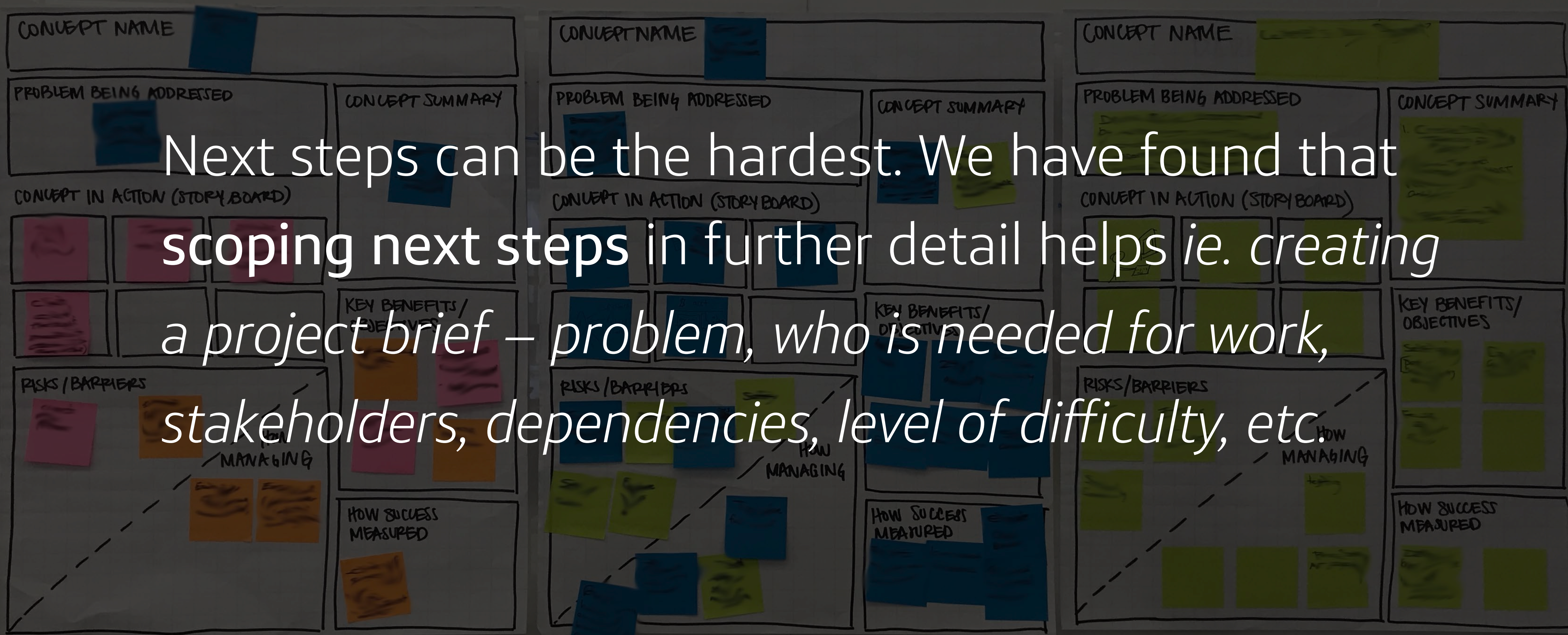
HOW SUCCESS MEASURED

[Yellow sticky note] [Yellow sticky note]

[Yellow sticky note] [Yellow sticky note]

CONCEPT SUMMARY

[Yellow sticky note]



Next steps can be the hardest. We have found that *scoping next steps* in further detail helps *ie. creating a project brief – problem, who is needed for work, stakeholders, dependencies, level of difficulty, etc.*

Prioritization Today – *in progress*

- Leadership has decided on priorities that effect horizontals vs silos
- Next up is follow-through
- We are working through socializing
- Some re-organizations are planned
- Framework for saying “no” in works
- Product audit to narrow happening
- There is still more to do...



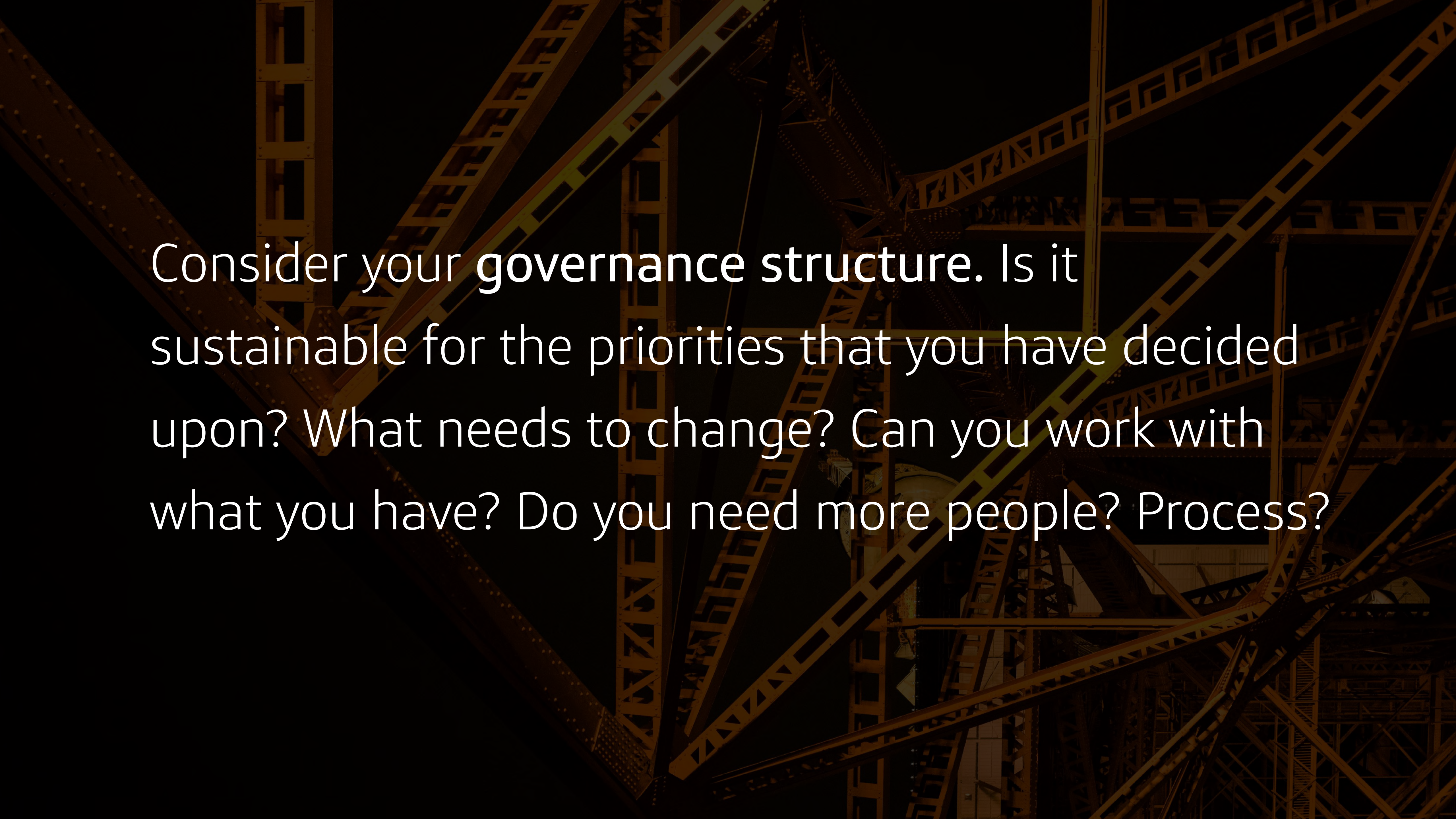
- ✓ Research – creating a sustainable practice
- ✓ Sense Making – tools (of many) to get you started
- ✓ Co-Creation – workshop caveats, learnings
- ✓ *Prioritization – aligning teams to a targeted goals*
- ⑤ *Realization – following through to service launch*



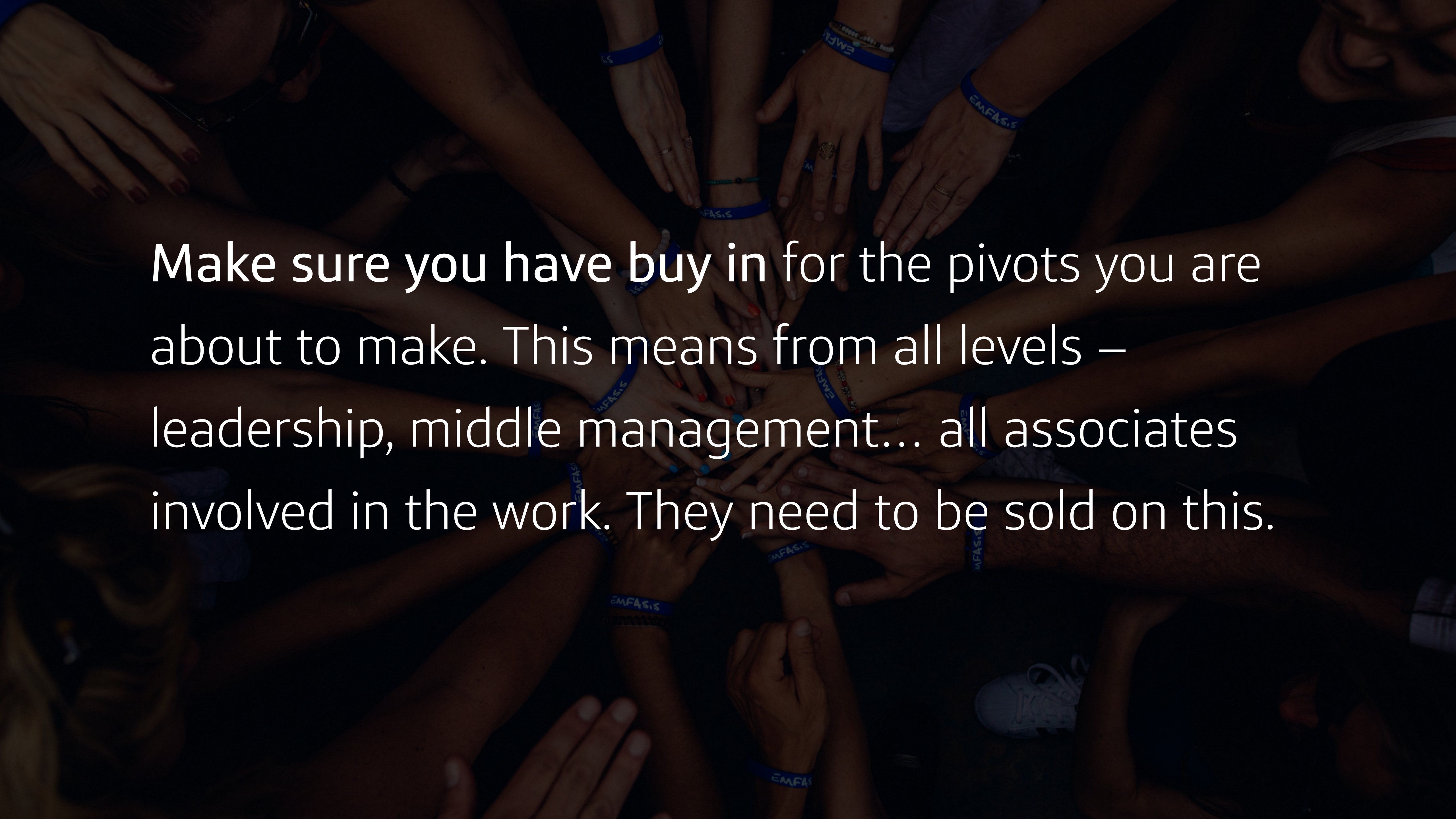
5 Following-through

| Following Through to Service Launch


For success it is crucial to have **accountable executives** for moving the work forward as well as some **work being taken off individuals plates.** Expecting people to do more with less capacity sounds silly, but it happens all the time. Watch out!



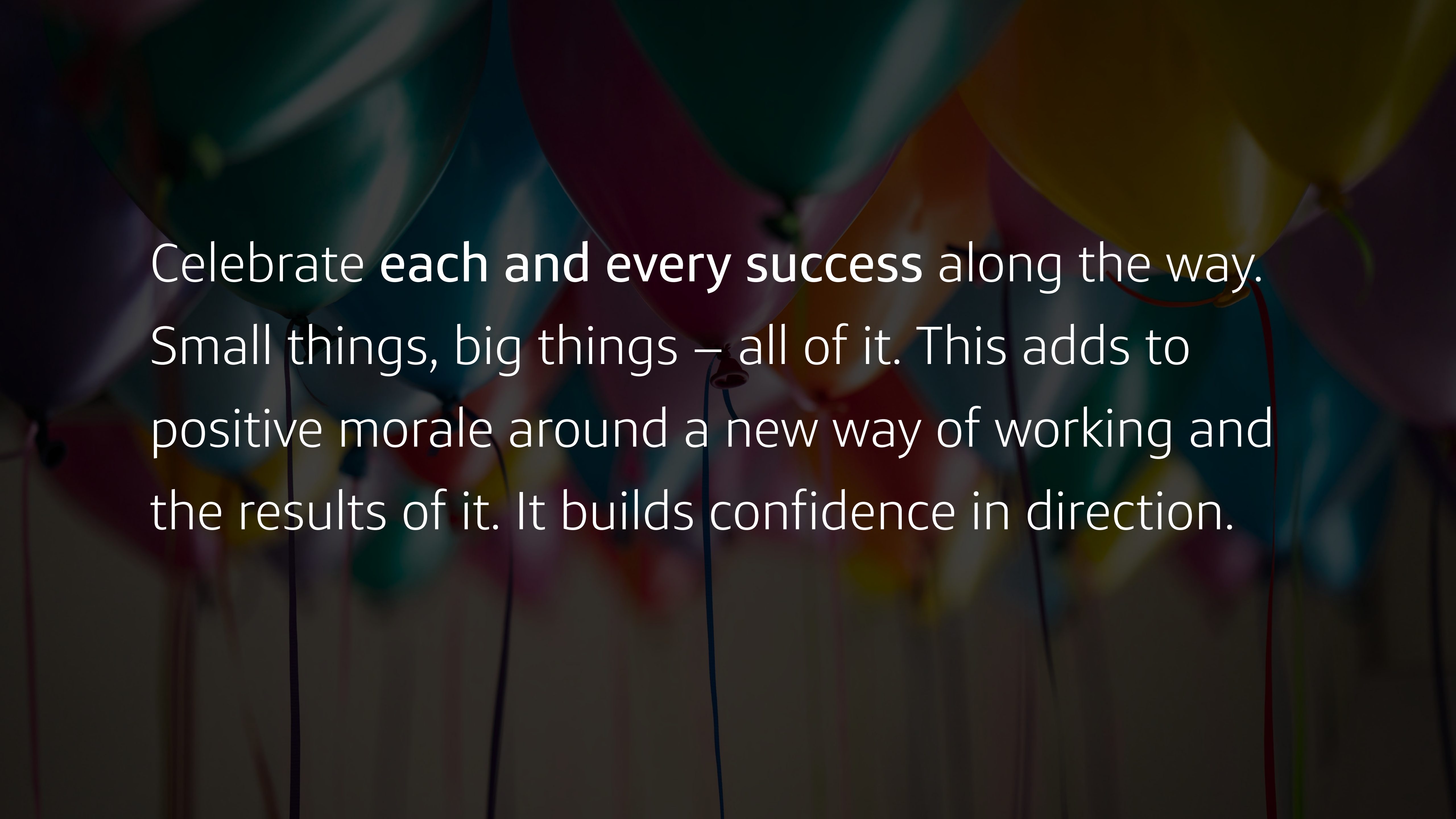
Consider your **governance structure**. Is it sustainable for the priorities that you have decided upon? What needs to change? Can you work with what you have? Do you need more people? Process?



Make sure you have buy in for the pivots you are about to make. This means from all levels – leadership, middle management... all associates involved in the work. They need to be sold on this.

A group of people are seated at a long table in a restaurant, engaged in conversation and eating. The scene is dimly lit, with warm ambient lighting. The text is overlaid in white, sans-serif font, centered horizontally and vertically across the image. The background shows other diners and restaurant decor, including a red sign on the wall.

Consistent socialization and messaging around these initiatives is really key. It can be easy to lose momentum, so think about what you can put in place to to keep the ball rolling, keep people excited.



Celebrate **each and every success** along the way.
Small things, big things – all of it. This adds to
positive morale around a new way of working and
the results of it. It builds confidence in direction.

Follow-through Today – *in progress*

- We are still working through all of these things, maybe next year I will do another talk on further success!
- It has taken a while to get here, so we are happy for the progress we have made thus far
- We are steering a big ship



Wrapping Up



- ✓ Research – creating a sustainable practice
- ✓ Sense Making – tools (of many) to get you started
- ✓ Co-Creation – workshop caveats, learnings
- ✓ Prioritization – aligning teams to a targeted goals
- ✓ Realization – following through to service launch

Final Thoughts

- Behavior change takes time
- Service Design is worth investing in
- Start with the research
- Don't stop at a co-creation session
- Prioritization is hard and political
- Following through takes an army



Reflect on Where You Are Now ... And Where to Next?

RESEARCH



Proper Inputs

Understanding of who needs to be involved to gain a comprehensive current state view

SENSE MAKING



Basic Frameworks

Awareness of tools to help you make sense of findings from stakeholders
ie. service blueprint

CO-CREATION



Strategic Ideation

Ability to get the right people in a room to facilitate productive sessions for realistic ideas

PRIORITIZATION



Governance, Prioritization

Teams aligned to complimentary, if not the same, goals for real progress

REALIZATION



Follow Through

Dedication to progress over an extended period of time to test, learn and impact change

Service Design Links & Resources

- What is Service Design? by FJORD

<https://vimeo.com/212939377>



- Service Design Network: <https://service-design-network.org>

<https://www.service-design-network.org/headlines/new-to-service-design>

- This is Service Design Doing
- This is Service Design Methods



Thank you for having me!

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I also co-run the **New York chapter** of
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Thanks!