UX Insight 2020

Driving Organizational Change through User Research

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Agenda

01/ **Introductions**

02/ **Driving Change**

03/ **Service Design Fundamentals**

04/ **Scenario Overview**

05/ **Stakeholder Maps**

06/ **Service Ecologies**

07/ **Journey Maps**

08/ **Story Mapping**

09/ **Working with Leadership**

10/ **Q&A**
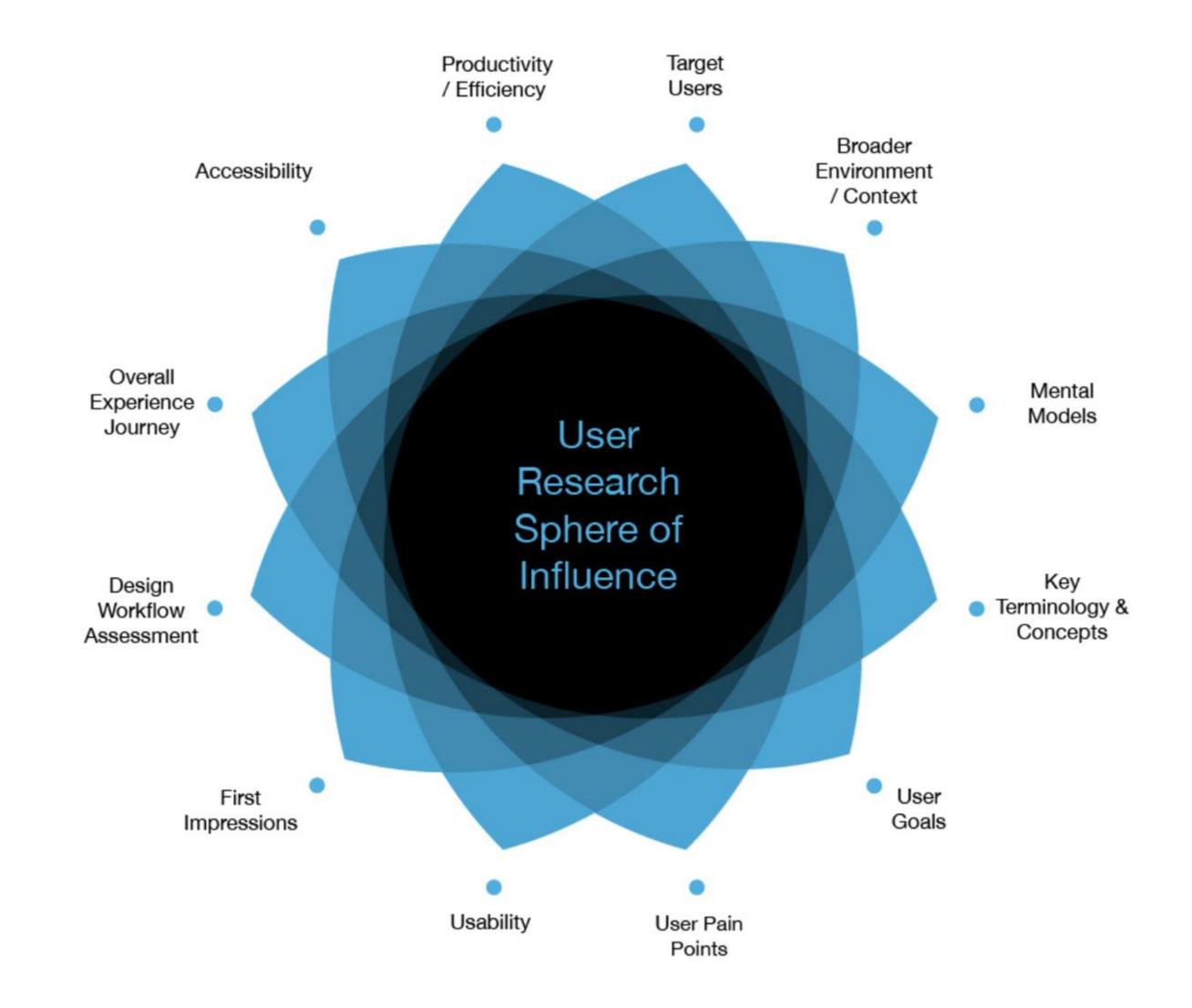
2/ DRIVING CHANGE

What are some of your organizational challenges?

—

What is User Research?

User research sphere of influence / **Tomer Maimoni**

Research Drives Change

- Insights into people behaviors helps **making informed product and service decisions**
- **Challenges assumptions** about the needs and goals of target users and shapes customer and brand strategy
- Helps determine what should be addressed as priority in order to **drive business value**
- Helps in **minimizing redevelopment costs**
- Drives **alignment between multiple stakeholders** and helps drive focus on what is important to customers and users

Insights that really drive change

Customer Insights

- Customer needs & goals
- Behaviors
- Workarounds
- Satisfaction and Engagement

Business Insights

- Employee needs & Goals
- Behaviors
- Delivery Strengths and weaknesses
- Employee Satisfaction and Engagement

Market Insights

- Competitive landscape
- Emerging trends and best practices
- Analogous Studies

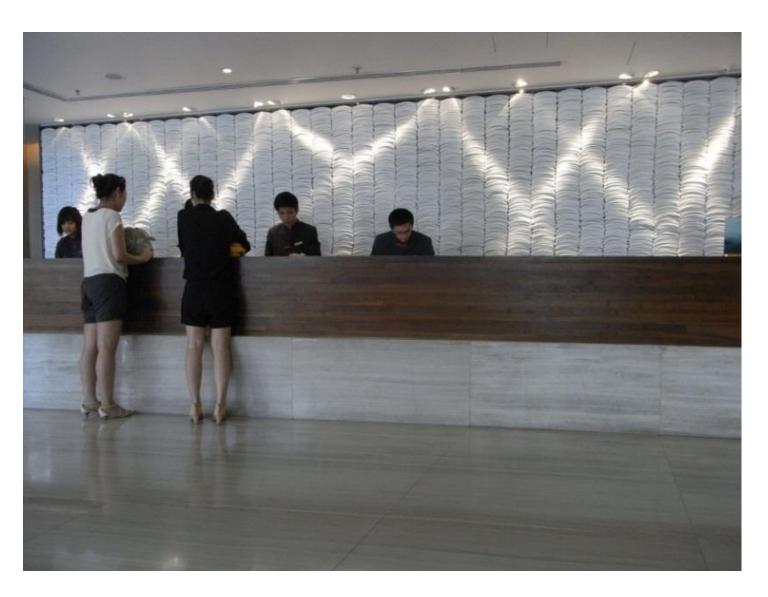# 3/ SERVICE DESIGN FUNDAMENTALS

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What is a Service?

"… an approach for achieving desirable outcomes… relies on someone or something to achieve the desired result."

"A service is actually a functional relationship, a partnership in which an actor who wants a transformation comes together with other actors who can help them achieve it."

- Christo, Sims, "Defining Services for Designers: 3-2-2007, UC Berkeley School of Information

Service Examples

Services vs. Products

- Companies that sell products tend to be in silos

- Very few organizations are thinking about the entre service experience

- The service experience is often disjointed, and highly variable as you move through "products"

Products

Service

Products to an Experience

Commodity

Product

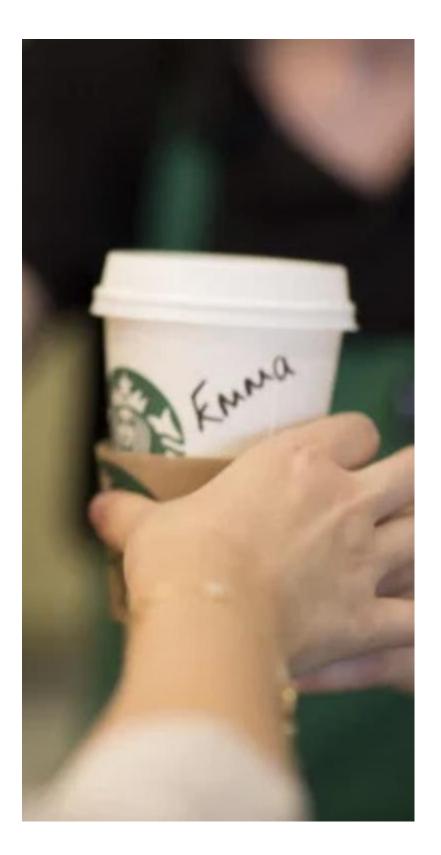Service

Experience

Functional

Emotional

What is Service **Design**?

- *Service design is all about making the service you deliver useful, usable, efficient, effective, and desirable"*

  - UK Design Council, 2010

- *"Service design is a holistic way for a business to gain a comprehensive, empathic understanding of customer needs"*

  - Frontier Service Design, 2010

Video Example   (https://vimeo.com/115639635)

Five Principles of Service Design

User-Centered

The user or customer is at the heart of the design – goal is to improve the service experience for the user/customer

Co-Creative

The service design process is creative and requires involvement from all stakeholders

Iterative

Service design is not a single event, it a series of iterative activities to develop a better service experience

Evidencing

physical artifacts are a central element in the service design process

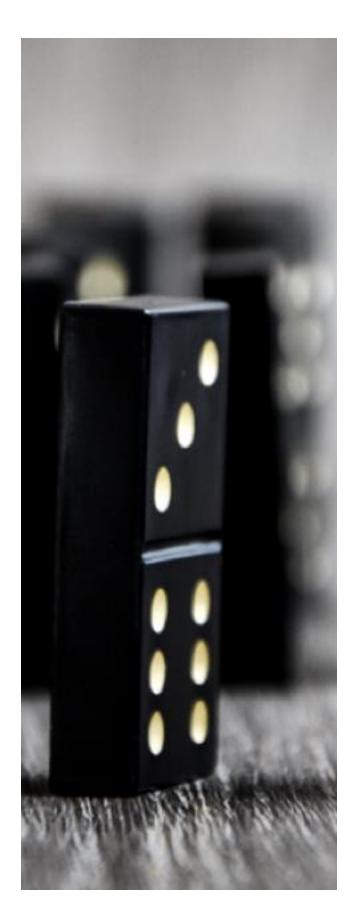**Holistic**

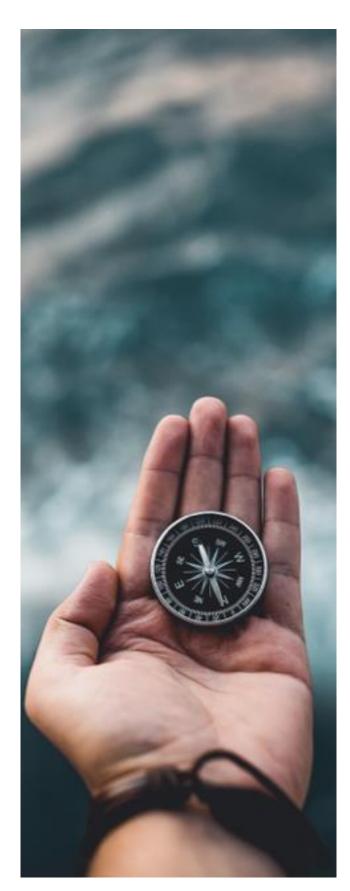Service design is about taking a broad, holistic perspective, including all touch points, interactions, and systems
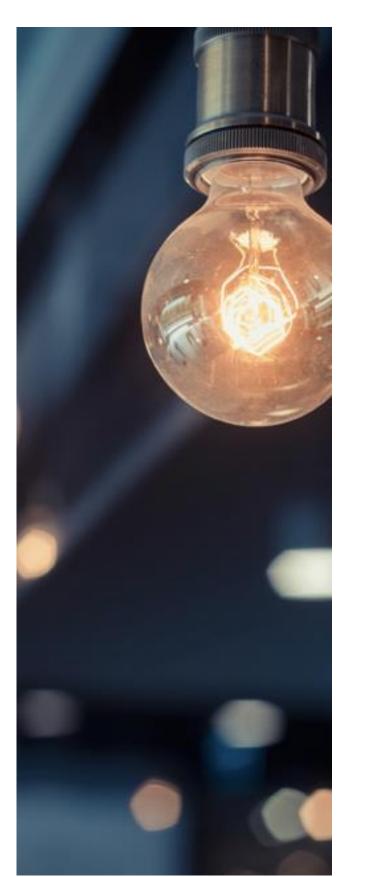
Service Design Process

ALIGN

EXPLORE

IDEATE

DESIGN & EVALUATE

IMPLEMENT
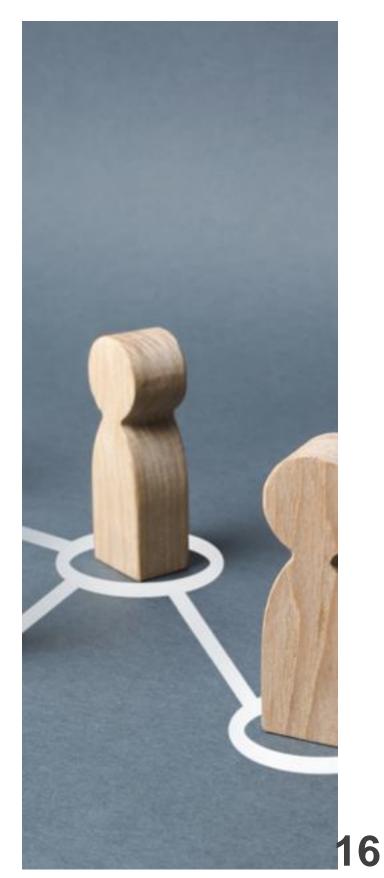
MEASURE

DISSEMINATE

4/ SCENARIO OVERVIEW

Instructions

You will be provided a scenario to work with for the subsequent sections.

You may choose our scenario, or work with your own. The idea is to give you the opportunity to gain hands-on learning on some of the tools and methods.

Scenario

Traveling post COVID-19

How might we reinvent travel and implement new approaches to improve people's confidence in air travel?

High level structure

INSPIRATION	BOOKING	ANTICIPATION	INFLIGHT	LANDING & ARRIVAL

Frontline Functions

INSPIRATION	BOOKING	ANTICIPATION	INFLIGHT	LANDING & ARRIVAL
• Market Research • Online search engines • Retail Outlets	• Commercial Sales • eCommerce • Retail & Contact Centres • Transport providers	• Airport Operations teams • Baggage Services	• Network Control • In flight service delivery • Catering	• Baggage Services • Ground Handling Agency • Transport providers

Technology

INSPIRATION	BOOKING	ANTICIPATION	INFLIGHT	LANDING & ARRIVAL
• Search engines • Websites • Information Kiosks	• Website • Travel Agent applications • Call Centre applications	• Airport control systems	• Communications Systems • Entertainment systems	• Airport control systems • Communication systems

Support Departments

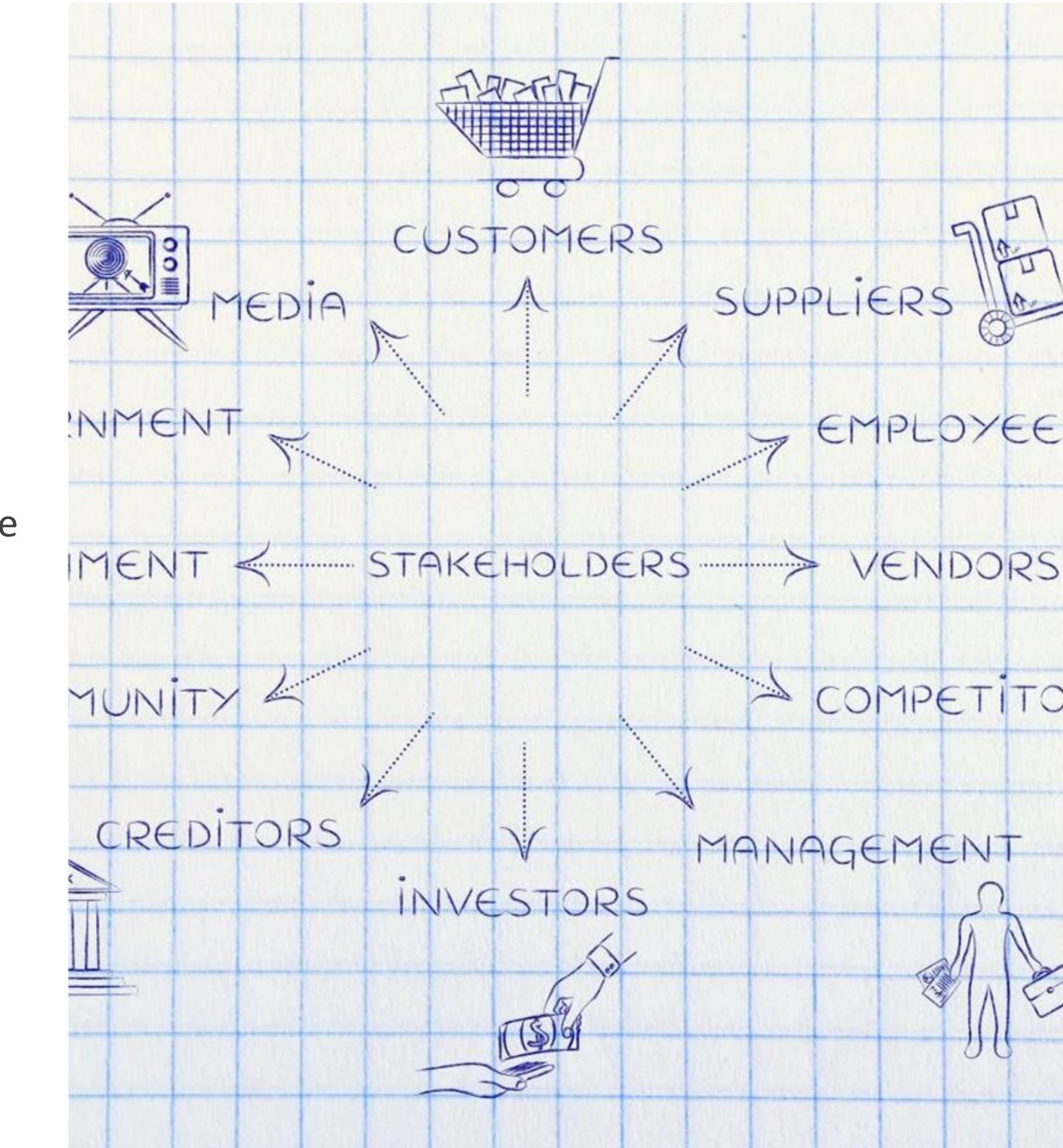Finance   Human Resources   Planning   Executive Management

5/ **STAKEHOLDER MAPS**

Stakeholder Maps

- Goal is to highlight concerns of different stakeholders and give the service designer an opportunity to visualize opportunities

- Encompasses all stakeholders involved in a service

- Internal stakeholders- employees, executives, departments

- External stakeholders - customers, vendors, investors

- Direct (people who use/take part in) and indirect (people affected by it only) stakeholders

- Focuses on how they interact, the relationship they share in the context of a service
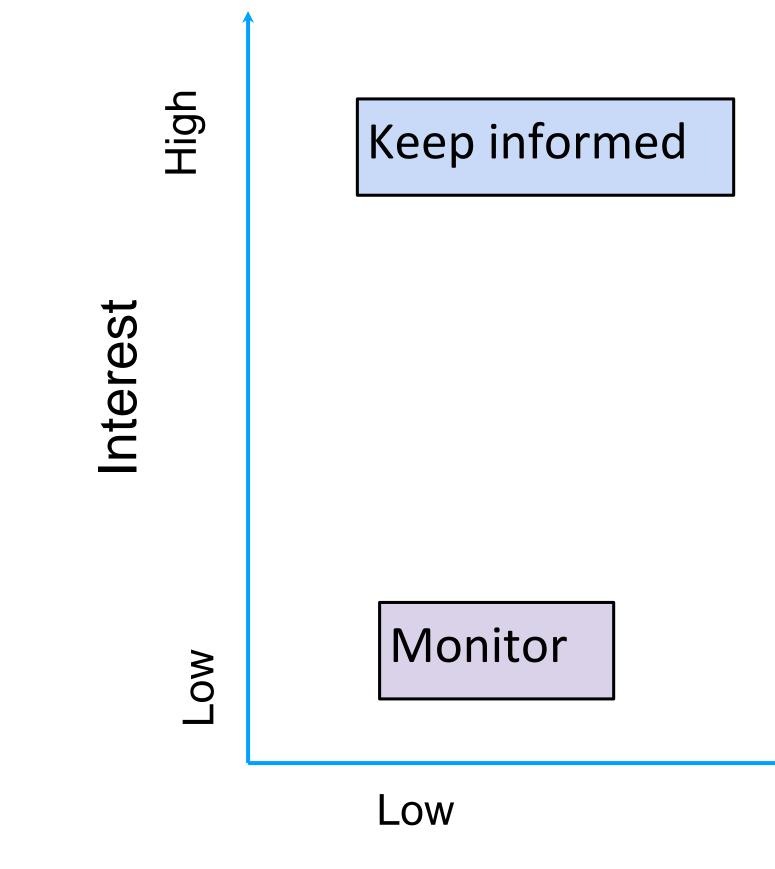
Stakeholder Interviews

- Gain insight into different stakeholder perspectives - what do they want to learn and how will they use the insights from your research

- Cast a wide-net of potential stakeholders

- Semi-structured interviews, typically 1:1

- Win support for current (and future) research

- Ensure that interests align to your research plan

- Follow-up throughout research, particularly with results and deliverables
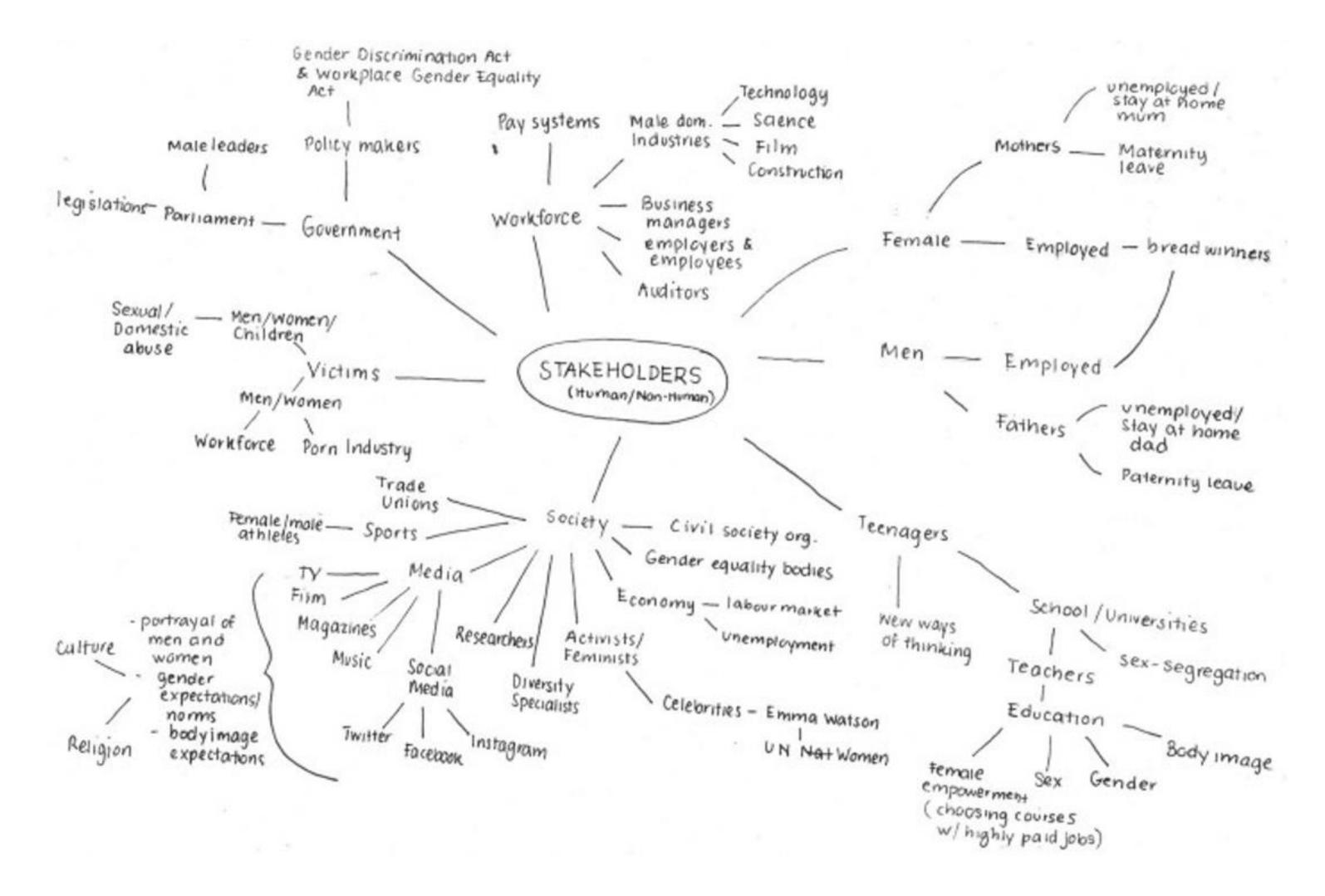
Power-Interest Grid

Keep informed | Manage closely
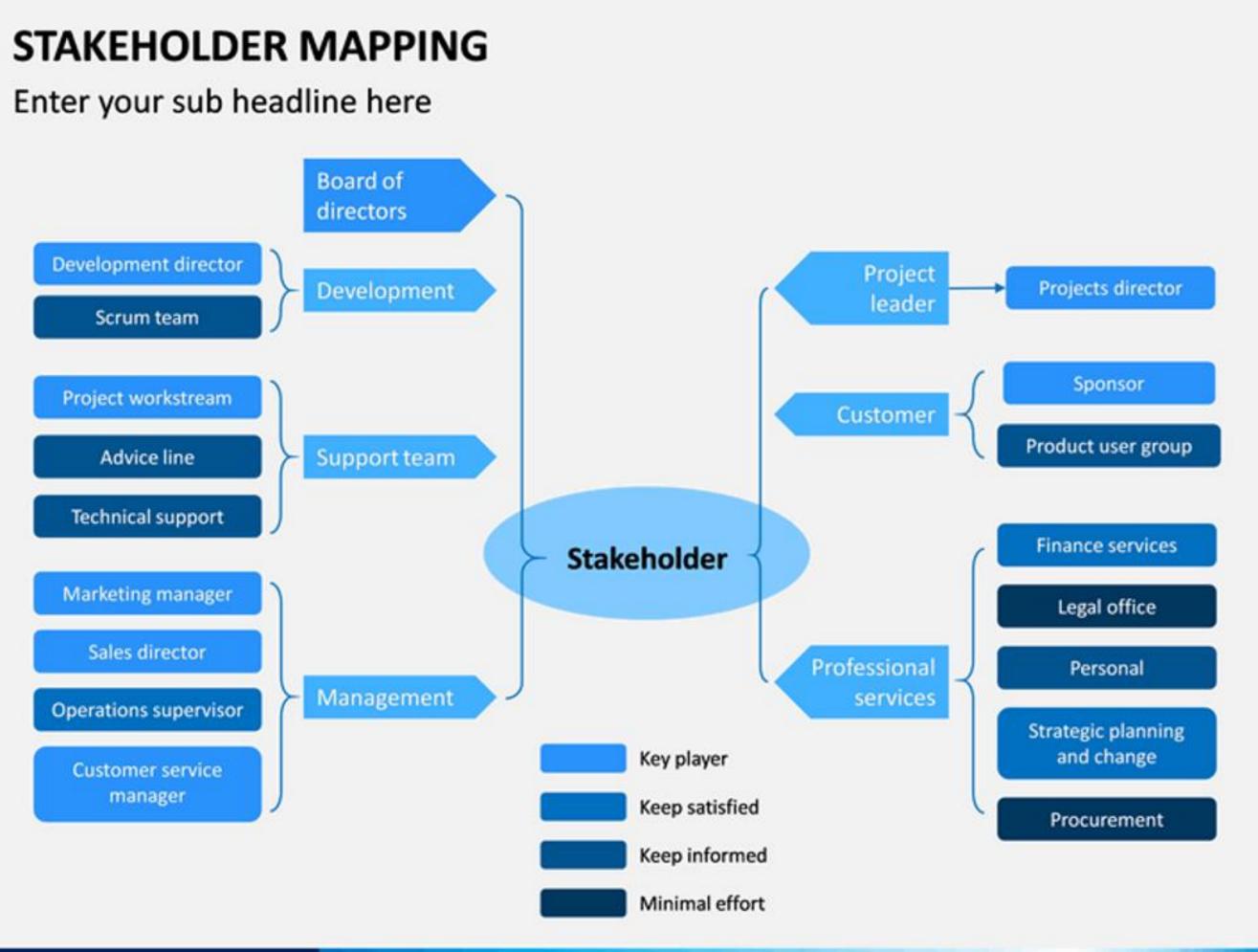
Monitor | Keep satisfied

Interest: High / Low
Power: Low / High

Stakeholder Maps: Examples

https://uxdict.io/design-thinking-stakeholder-maps-6a68b0577064

Stakeholder Maps: Examples

STAKEHOLDER MAPPING

Enter your sub headline here

Board of directors

Development director
Scrum team
Development

Project workstream
Advice line
Technical support
Support team

Marketing manager
Sales director
Operations supervisor
Customer service manager
Management

Stakeholder

Project leader → Projects director

Customer
Sponsor
Product user group

Professional services
Finance services
Legal office
Personal
Strategic planning and change
Procurement

Key player
Keep satisfied
Keep informed
Minimal effort

https://www.sketchbubble.com/en/presentation-stakeholder-mapping.html

Stakeholder Maps: Templates

Indirect stakeholders

Direct stakeholders

Core target group
and staff involved

Creating a Stakeholder Map

- List all stakeholders.

- Prioritize the stakeholders. Which of these stakeholders are essential, important, or interesting for your project?

- Visualize the stakeholder on a map. Sketch the stakeholders visually onto the stakeholder map according to the prioritization - the more important they are.

- Sketch the mutual relationships between stakeholders. What does each stakeholder provide to the other (product, money, trust, conflicts, etc.)?

Stakeholder Maps: Your Turn

- Each individual or team will create a stakeholder map

- Create your stakeholder map

- If it will help, feel free to create a power-interest grid

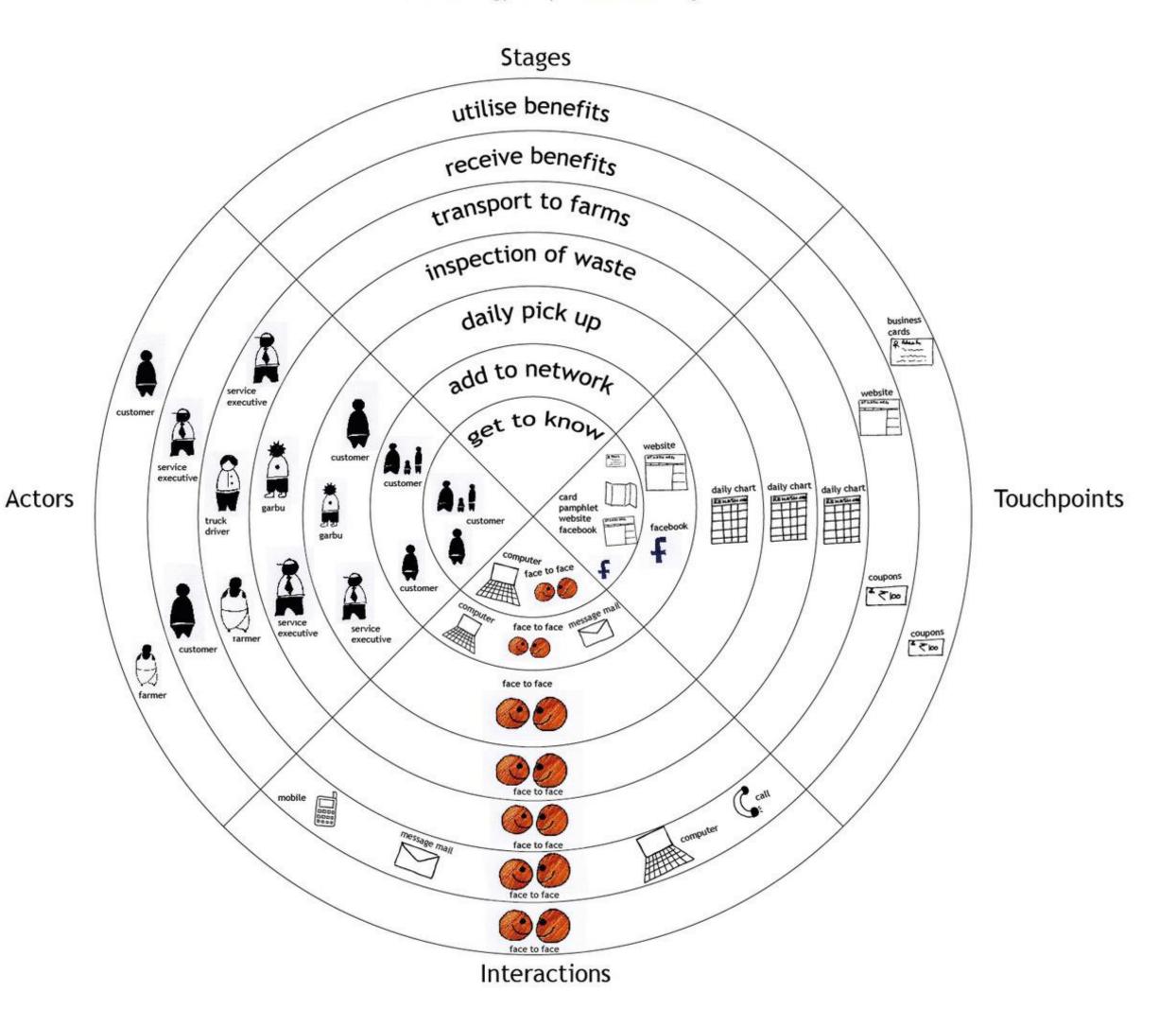- Discuss and share your stakeholder map

6/ SERVICE ECOLOGIES

Service Ecologies

- The Who, What, Where, When, Why, and How of a service

- Gives a top-down view of the entire ecology or landscape of a service

- Maps all actors (users, stakeholders, systems) and encompasses every relationship they share in the context of the service

- Represents the broadest representation of a service, including how it fits into the world around it

- What are some of the relationships? Who are your actors?

Service Ecologies: Examples

- Stages - Sequence of activities

- Actors - people who are involved at each stage

- Interactions - how the individual is interacting with each actor (in-person, via email, etc)

- Touchpoints - products or artifacts involved in each interaction (website, app, forms, etc.)
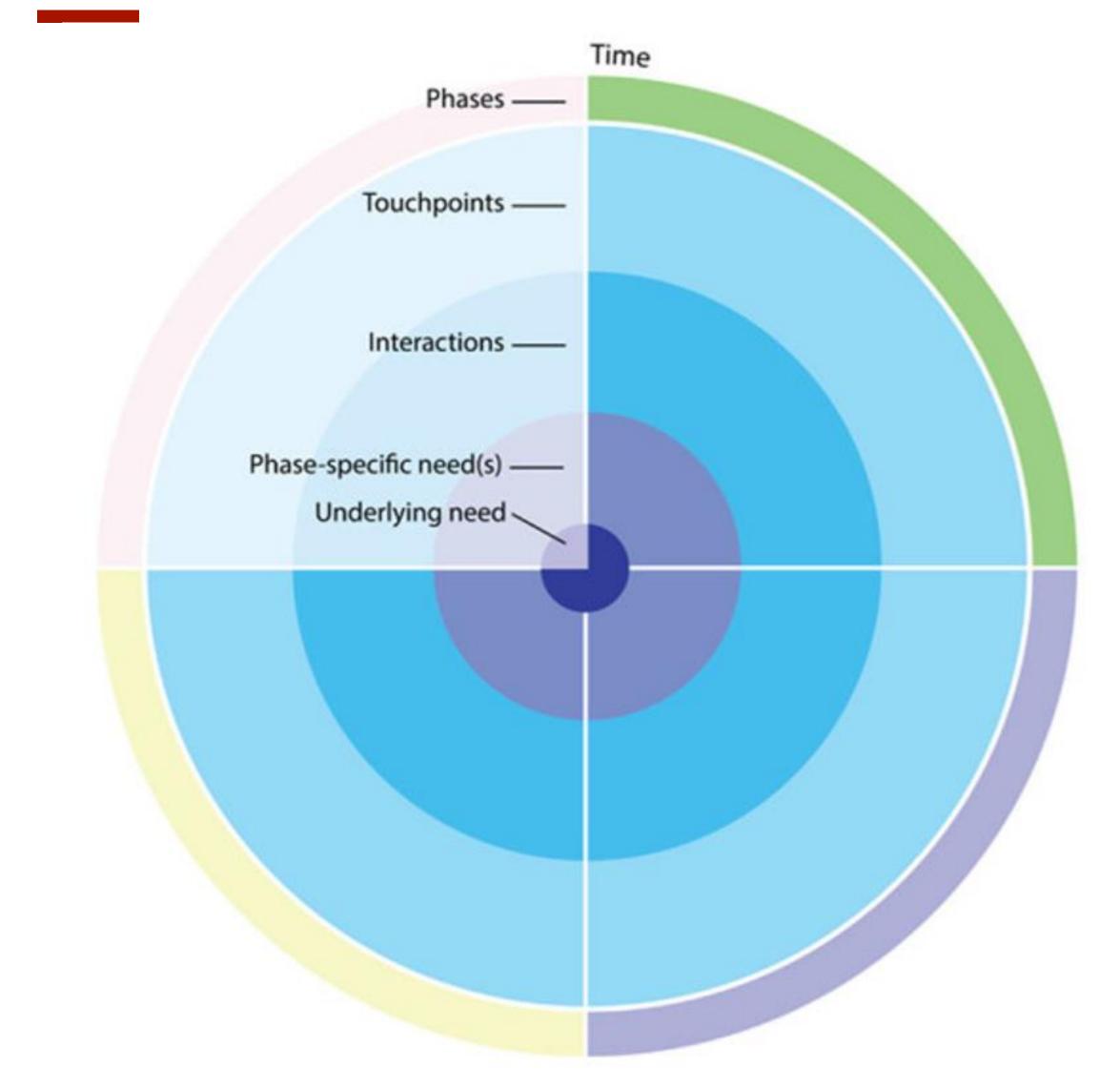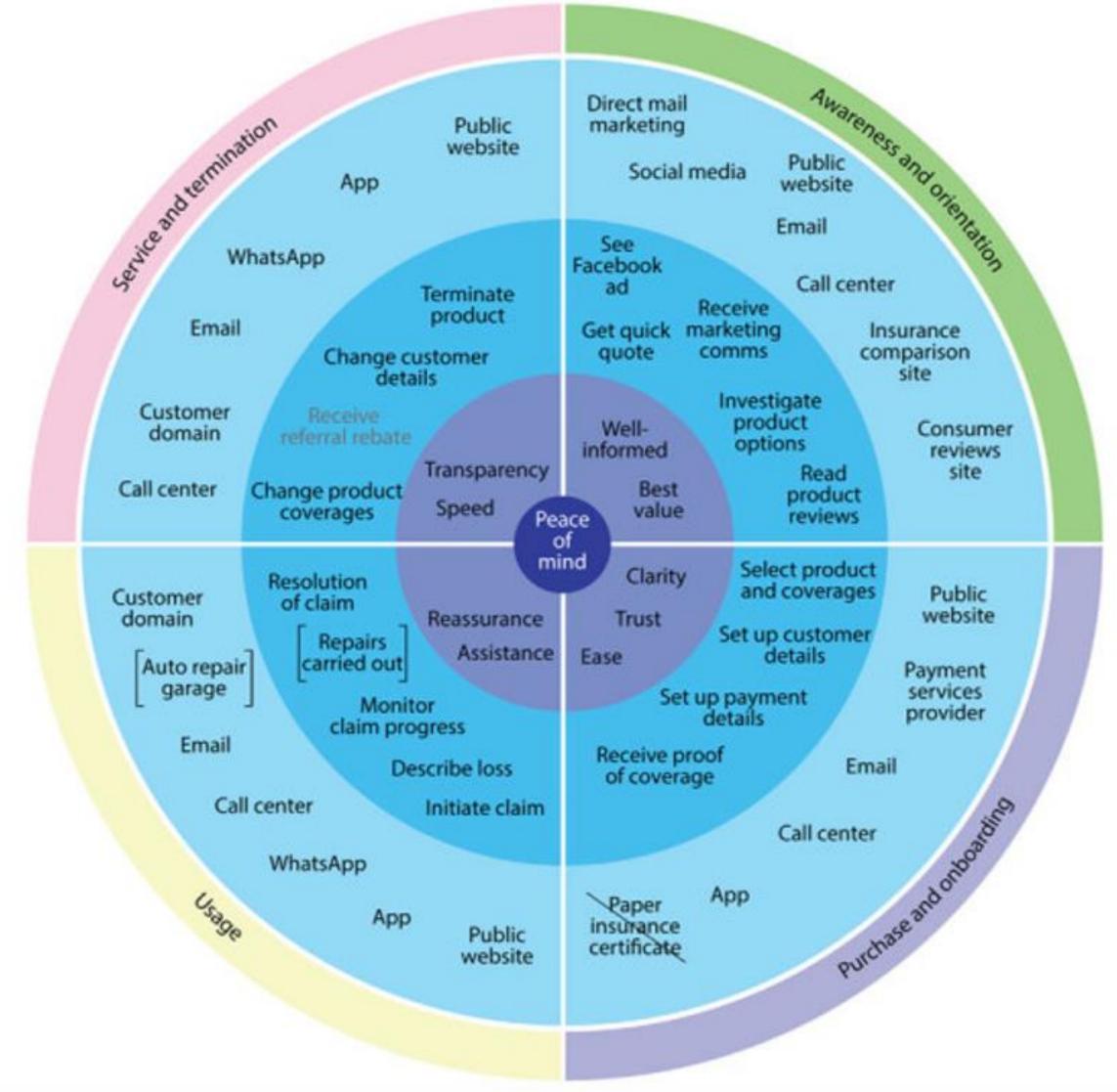

Service Ecology Map - Rehash.Org

http://srishrao.tumblr.com/post/33627931738/service-ecology-map

Service Ecologies: Examples

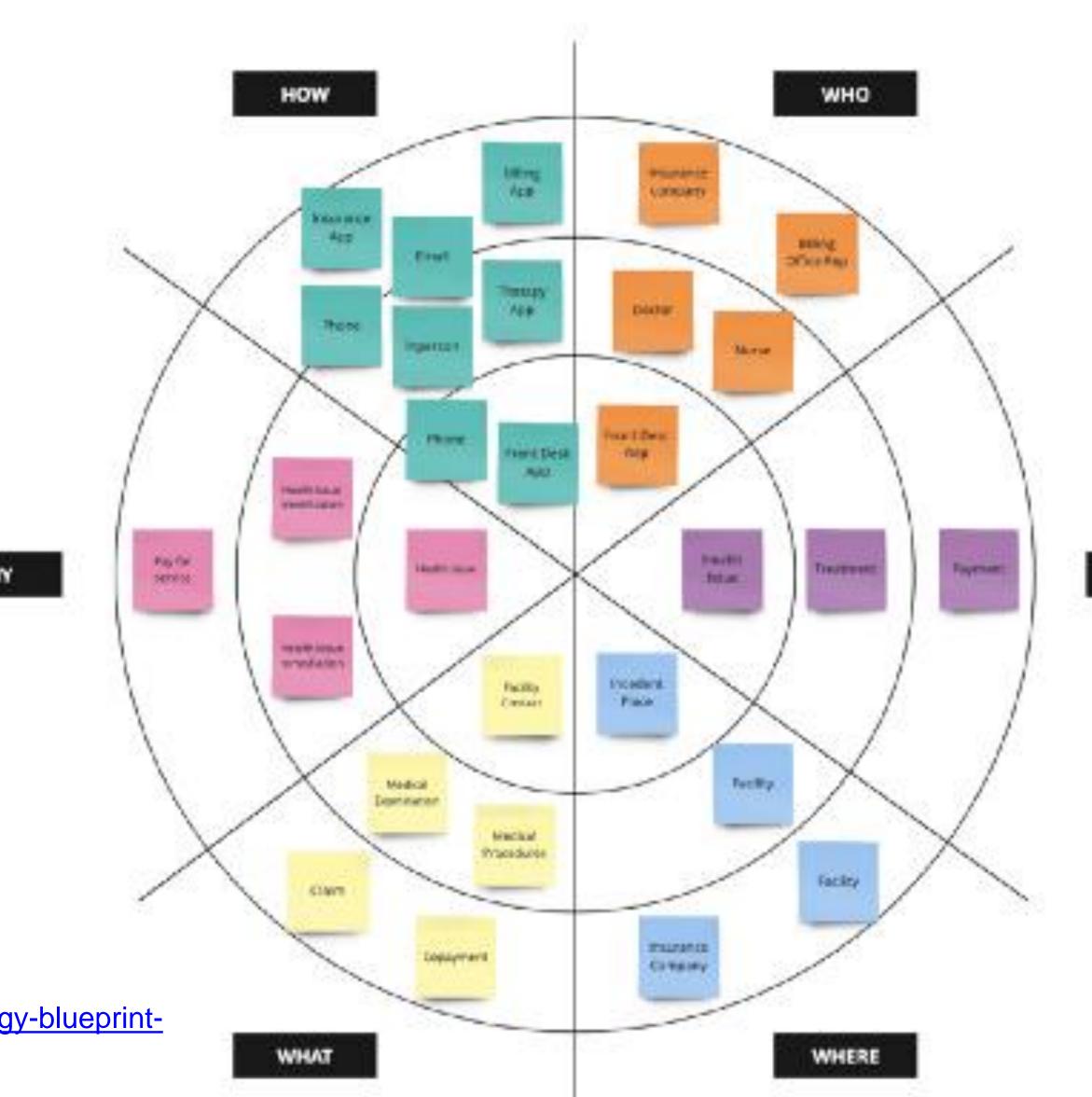# Service Ecologies: Examples

- <u>Who</u> - people (actors) who are involved at each stage

- <u>When</u> - situation of when the actor needs the service

- <u>Where</u> - context of where service is happening

- <u>What</u> - what the actor is doing or trying to accomplish

- <u>Why</u> - the actors motivations (goals)

- <u>How</u> - method of interaction (email, app, etc.)

https://medium.com/softserve-do/before-the-user-journey-rich-picture-service-ecology-blueprint-6613e5a532a0
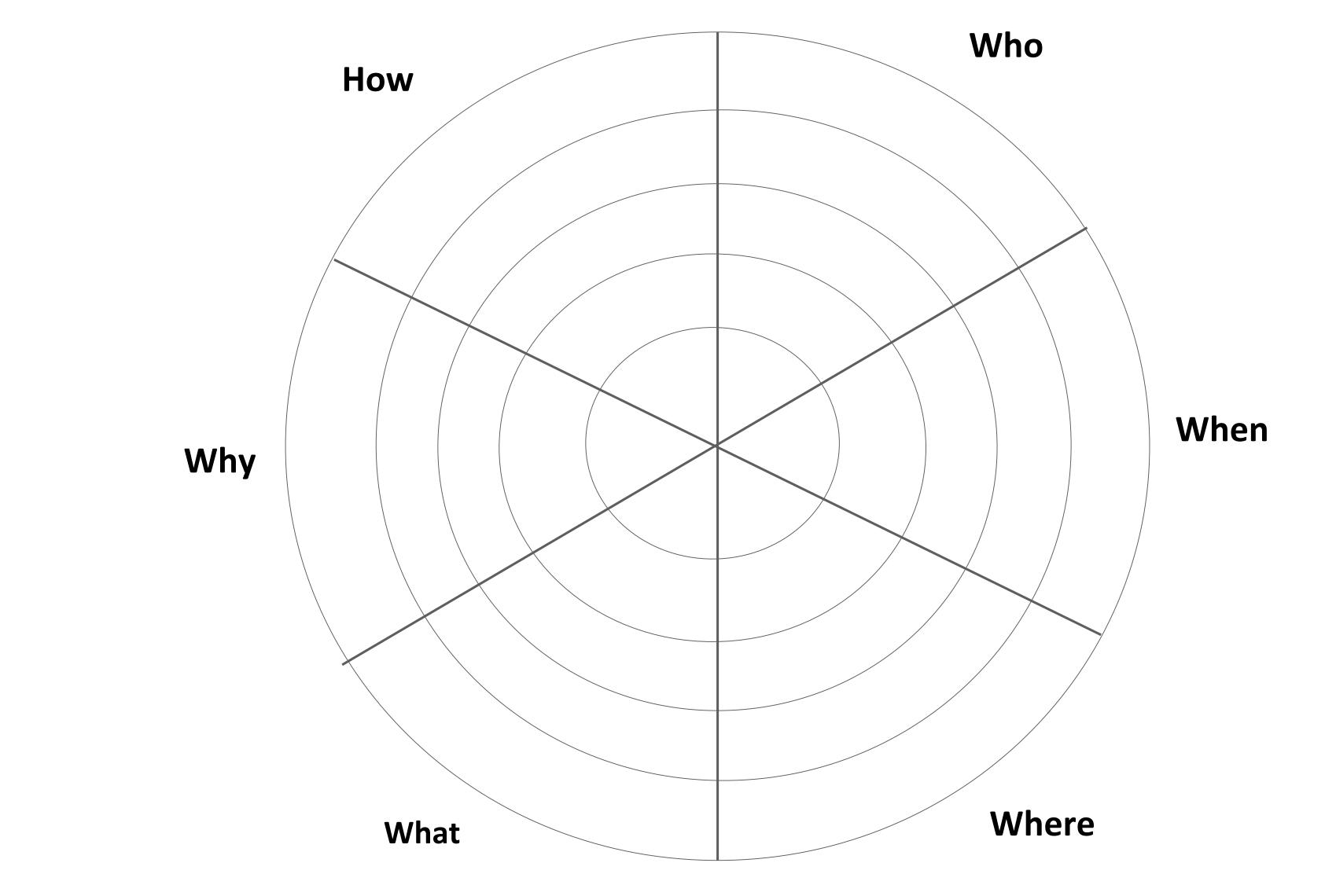
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Service Ecology Template

Service Ecologies: Your Turn

- Each person or team will create a service ecology map

- Feel free to use our template, or any of the examples as the basis for your service ecology map

- You will have 15 minutes to create a draft of the service ecology map
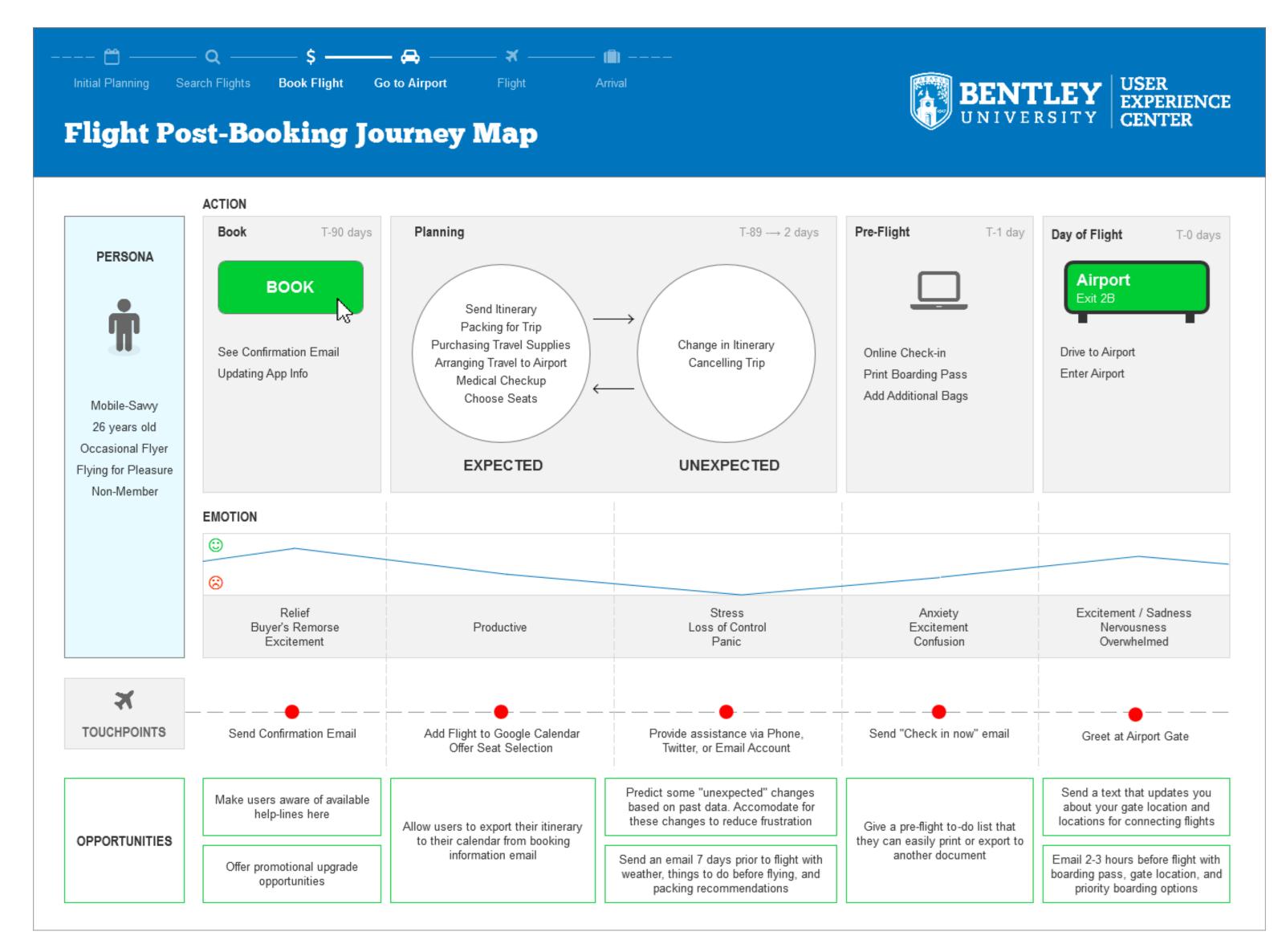
- We will discuss and share

7/ JOURNEY MAPS

Journey Maps

- Diagram of every touchpoint a customer might share with the service/ service provider

- Focuses on the technological and human aspects of the customers interaction- what are they using, who are they talking to, where is it happening?

- Capture the actions, thoughts, and emotions at every step

- Useful to build around personas. Can focus on a single, specific goal (single use of the service) or a longer relationship with the service (from initial marketing to termination)
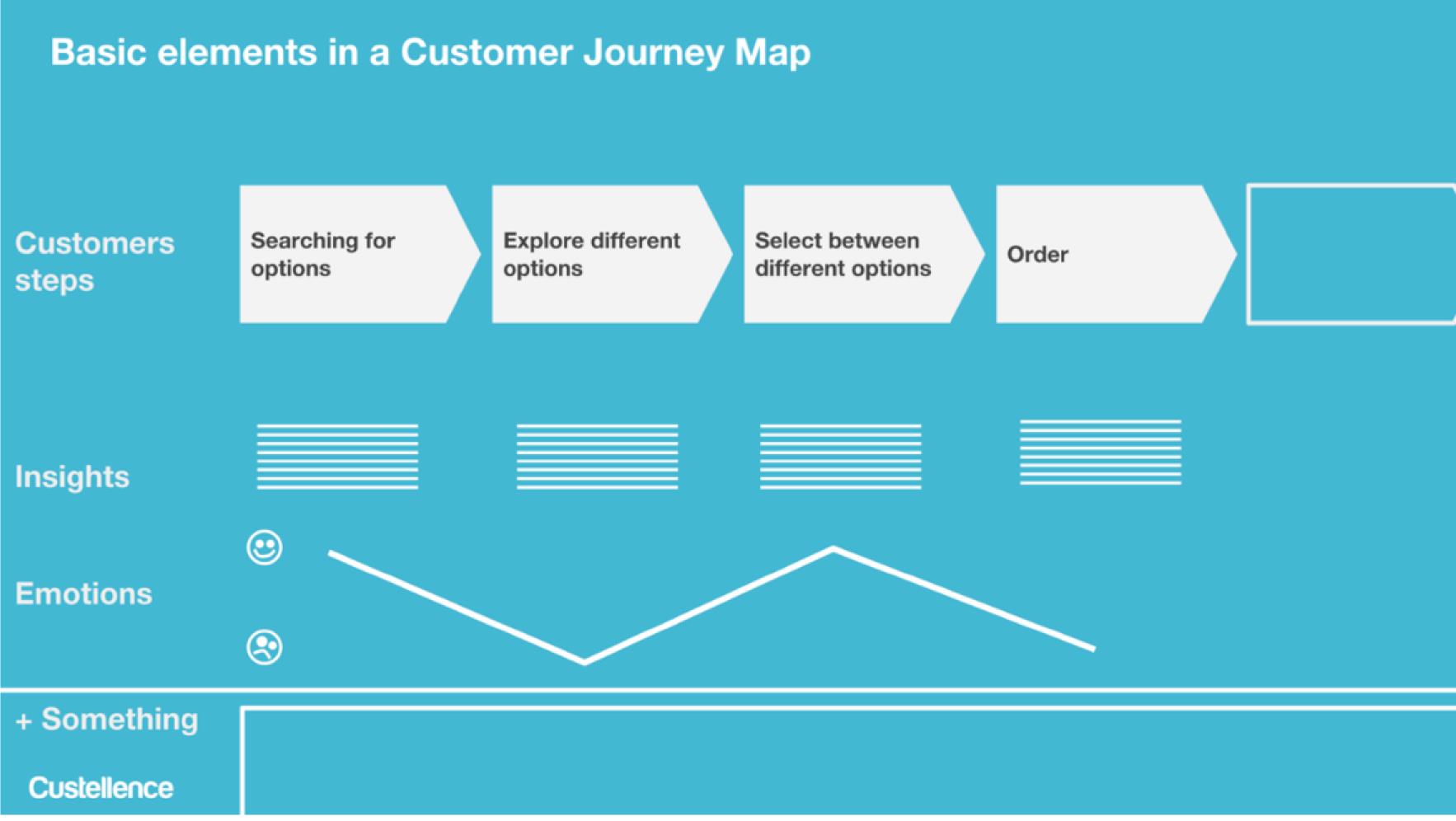
Examples: Journey Maps

Flight Post-Booking Journey Map — Bentley University User Experience Center

Examples: Journey Maps

Basic elements in a Customer Journey Map

| Customers steps | Searching for options | Explore different options | Select between different options | Order | |

Insights

Emotions

+ Something

Custellence

Examples: Journey Maps

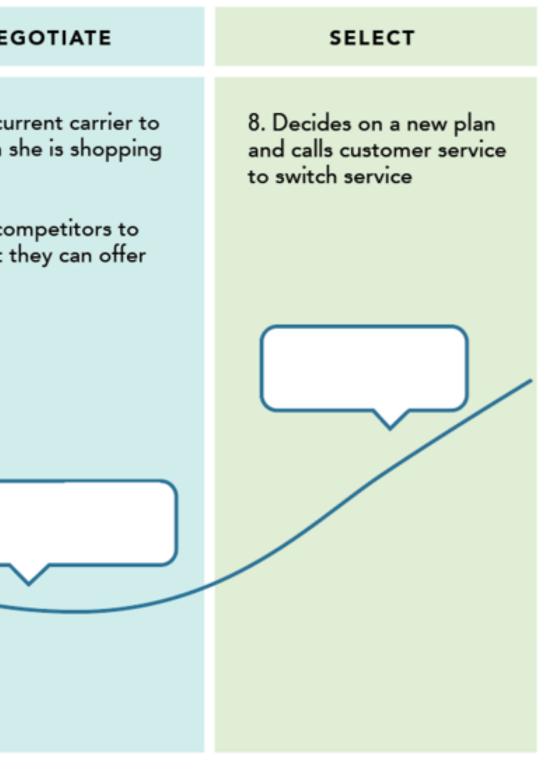**CUSTOMER JOURNEY MAP** *Example (Switching Mobile Plans)*

JAMIE

Scenario: Jamie needs to switch her current mobile plan. She wants a plan that can save her money without having to sacrifice usage limits.

EXPECTATIONS

• Clear online information
• Ability to compare plan breakdowns
• Friendly and helpful customer support

DEFINE	COMPARE	NEGOTIATE	SELECT
1. Review current plan 2. Define parameters for new plan	3. Watches commercial on TV 4. Researches companies and offers on consumer reports website 5. Uses current carrier website tool to compare options	6. Calls current carrier to tell them she is shopping around 7. Calls competitors to see what they can offer	8. Decides on a new plan and calls customer service to switch service

NNGROUP.COM **NN**/g

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Journey Map Template

| Journey Phase	1. PLANNING TO PASSPORT CONTROL													
Stages	PREPARE				TRAVEL TO		ARRIVE			CHECK-IN					SECURITY
Steps	Awareness	Planning & Booking	Anticipation &	Contact Centre (at anytime during the journey)	Chauffeur	Other	Enter & Orientate	First interaction	Final pre check-in prep	Check-in	Bag drop & special baggage	Payment counter	Landside wait	Any other?	Passport control & Security
Customer Value	CONFIDENCE						TIME								SAFETY
Emotional Response	HIGH ⁞ NEUTRAL ⁞ LOW						HIGH ⁞ NEUTRAL ⁞ LOW								
Relationship Maker															
Relationship Breakers															
Opportunities															

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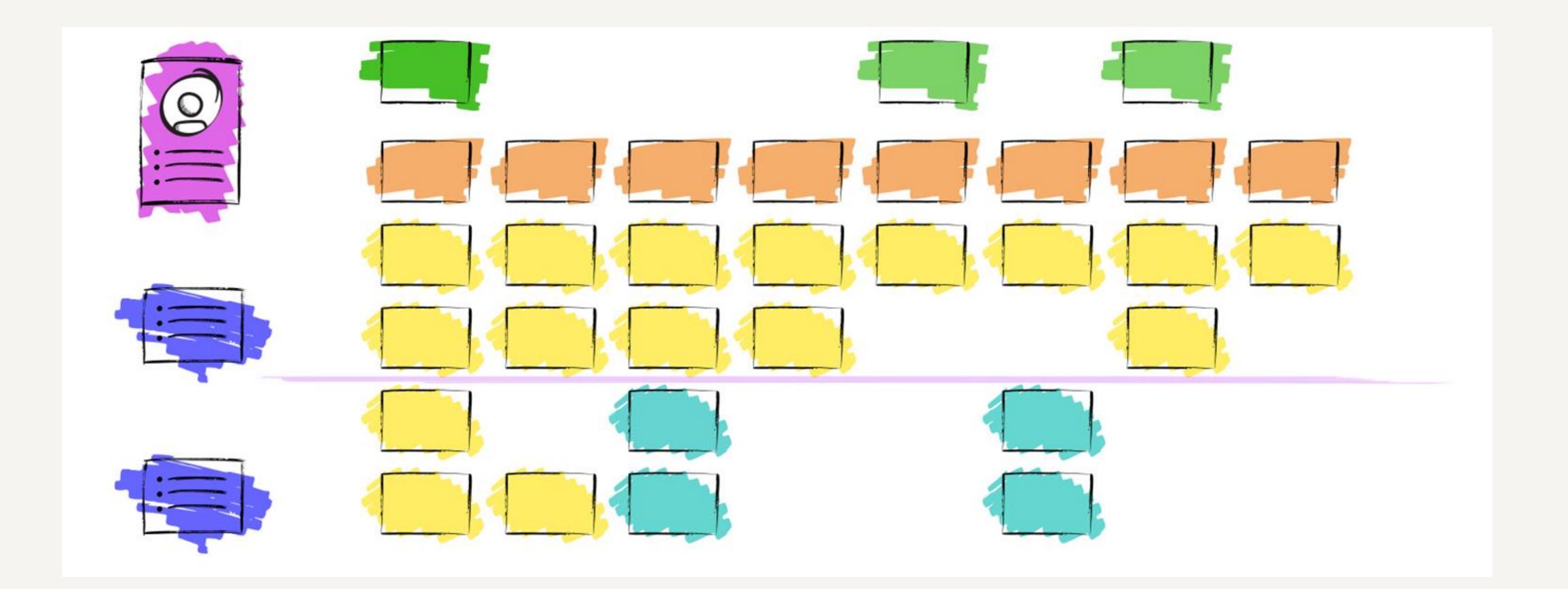
8/ **STORY MAPPING**

Driving alignment with Story mapping

Story maps give your team a **shared understanding** of what you're **attempting to build** and **why**, they spark conversations and **enable your team to have better conversations about the project throughout the development process.**
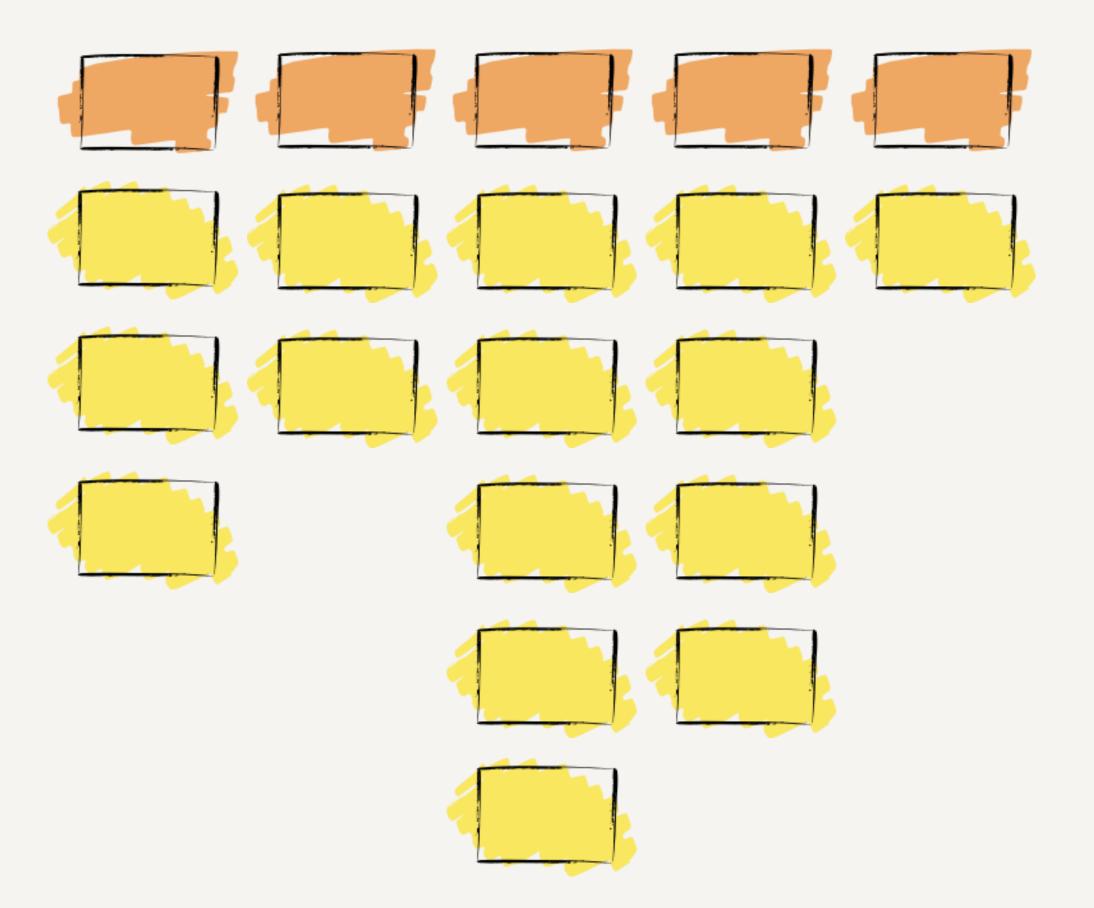
Story Mapping

Organize

Layout your stickies from left to right, from start to finish, **in the order that your primary user will perform each task.**

Group similar tasks into columns.

You can stack or remove the duplicates.

Put smaller tasks under the larger tasks. For example "wash my hair" or "clean my face" might go under "Showering".
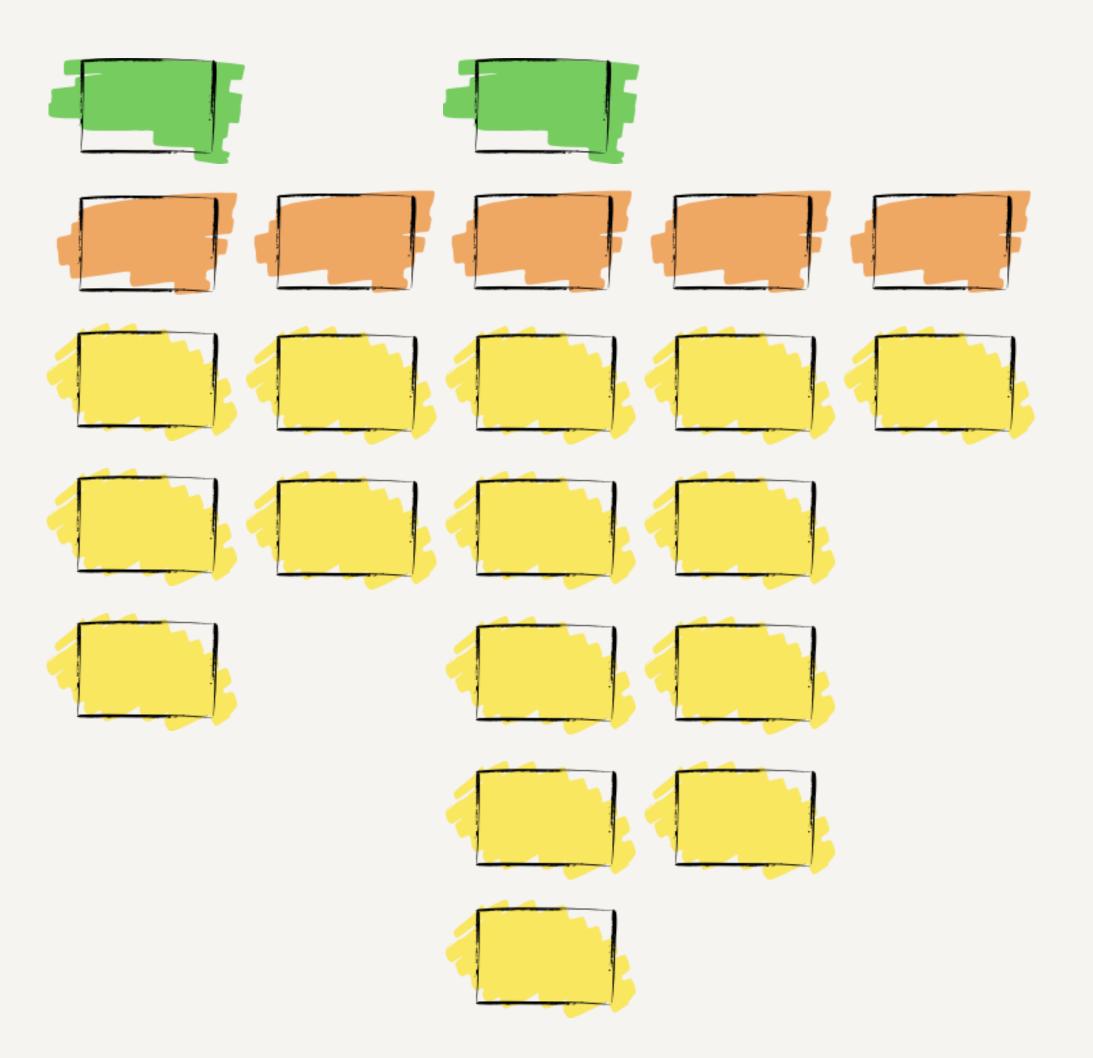
Patterns

Look at your groups of stickies and using a different coloured sticky create a **higher level label for all of your groupings**

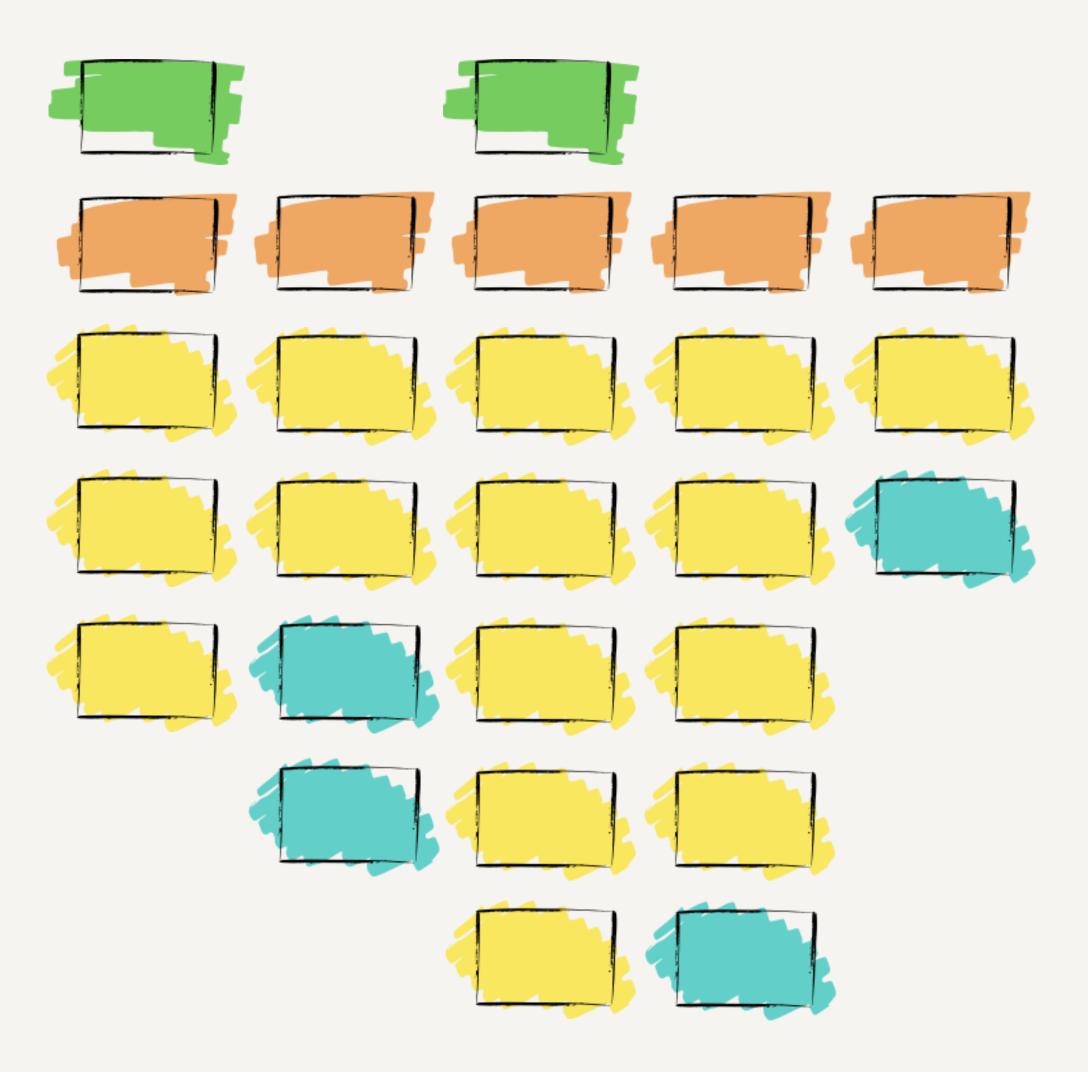You might need to invent some names for the things that don't have obvious titles.

What's Missing

Look back across the whole experience you've mapped out in front of you.

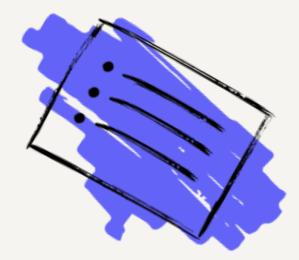Now think about **other scenarios that your primary user might interact with your solution.**
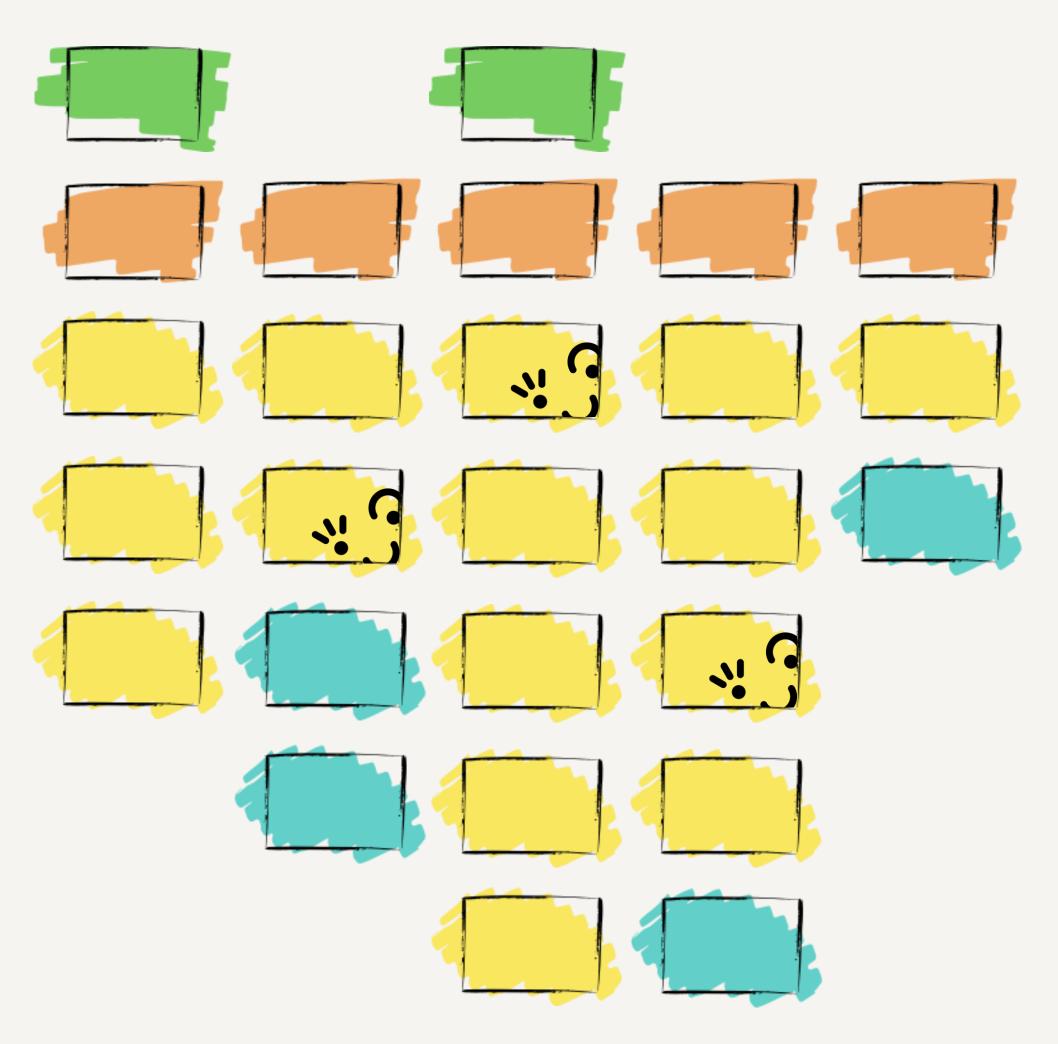
Now fill in the gaps by adding those tasks.

Add your goals

Add the goal we previously defined.
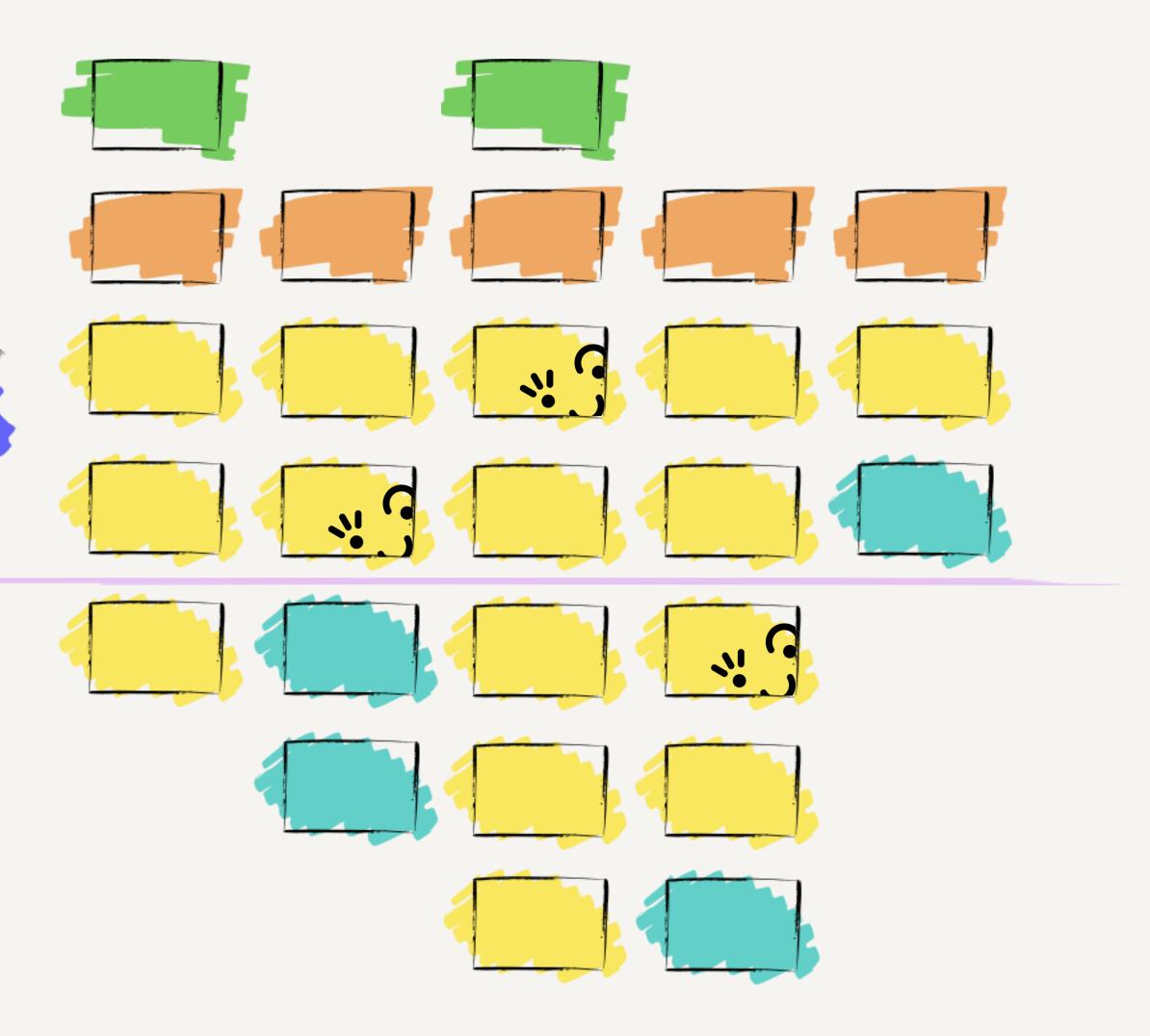
Use this to help you with the next step.

Slice the MVP

As a group, silently move tasks that you don't think are **essential to your goal to the bottom.**
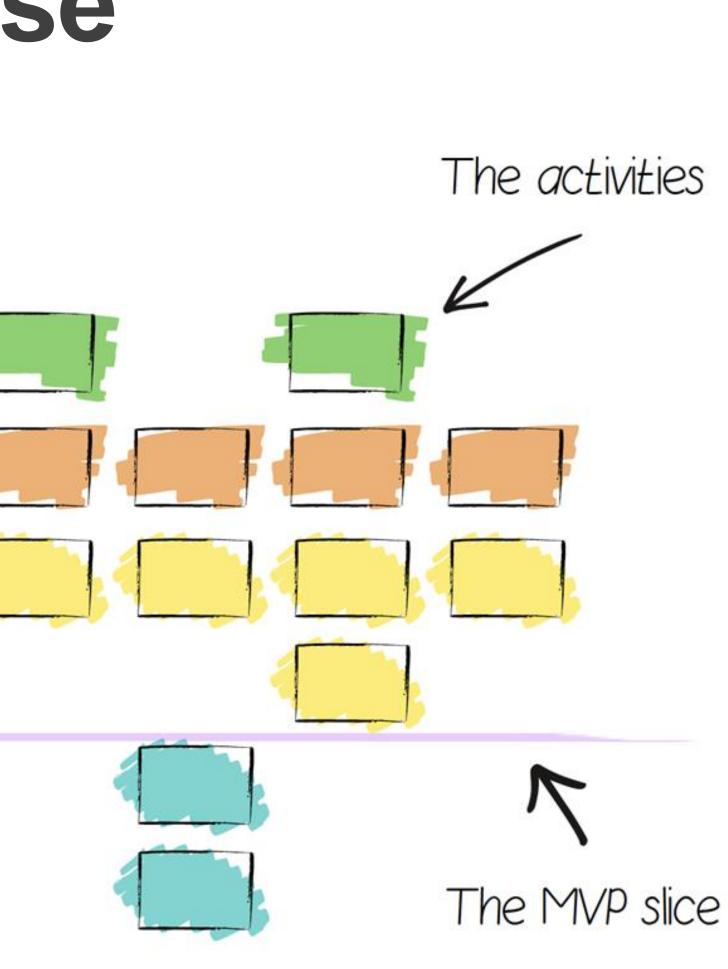
Be ruthless is it a must, could, should or a would do?

When you've finished you should only have tasks at the top of your map that are the **bare essentials for your primary user to resolve the issue you previously defined.** Now draw a line under all the essential items, **this is your MVP!**
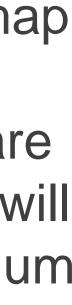
Story mapping Exercise

The user(s)

The backbone

The activities

Develop a storymap for one idea, and determine what are the features that will make your Minimum Viable Product.

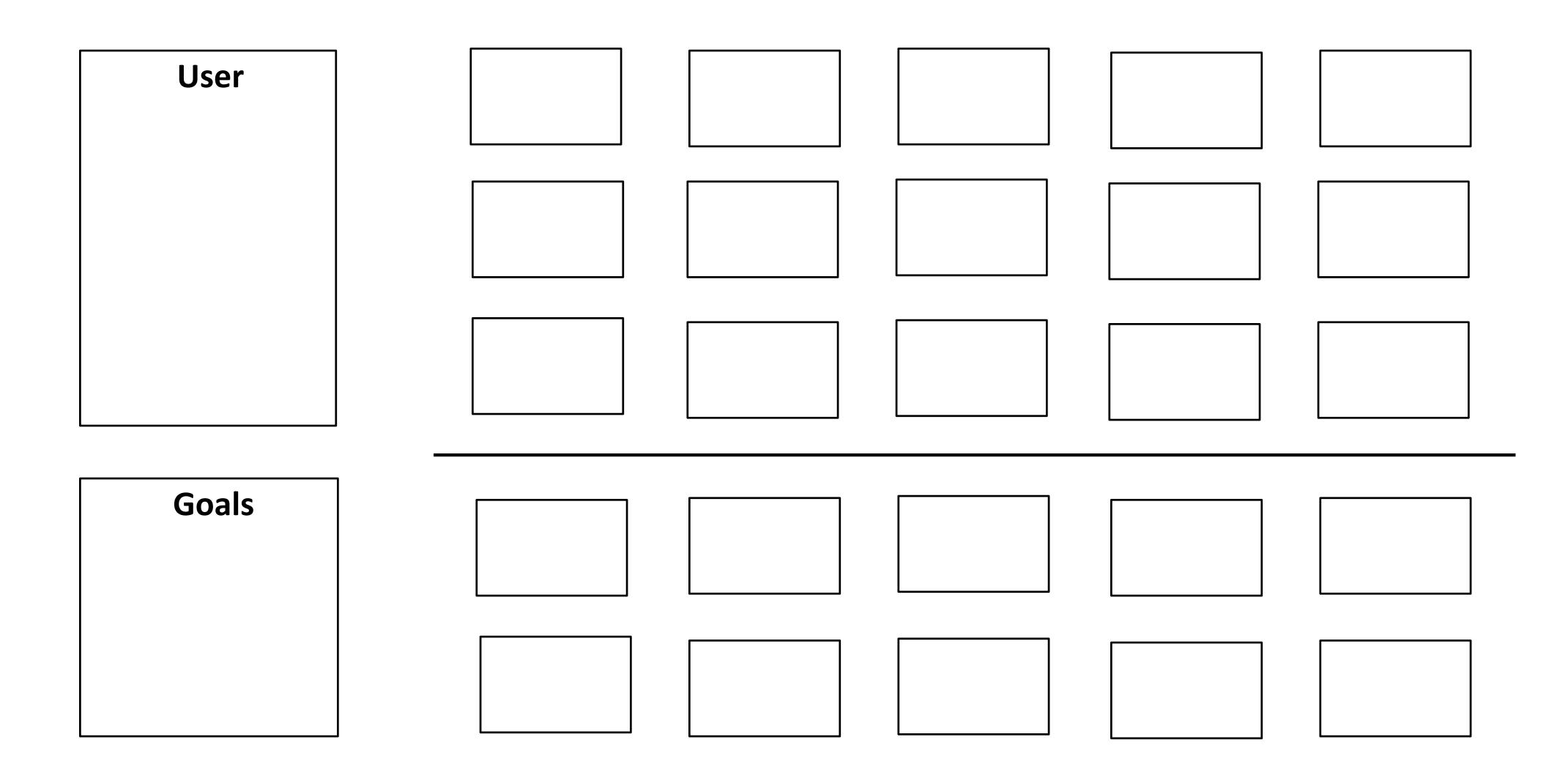Do remember to map the features to the user goals!

The MVP slice

The Goals

The tasks

The sub tasks

Story mapping - Example

Story Mapping: Template

User

Goals

Story Maps: Your Turn

- Each person or team will create a story map

- Feel free to use our template, or any of the examples as the basis for your story map

- You will have 15 minutes to create a draft of the story map

- We will discuss and share

9/ WORKING WITH LEADERSHIP

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?

MOTIVATIONS FOR PARTNERSHIPS
Optimization and economy
Reduction of risk and uncertainty
Acquisition of particular resources and activities

Key Activities

What Key Activities do our Value Propositions require?
Our Distribution Channels?
Customer Relationships?
Revenue streams?

CATERGORIES
Production
Problem Solving
Platform/Network

Key Resources

What Key Resources do our Value Propositions require?
Our Distribution Channels? Customer Relationships?
Revenue Streams?

TYPES OF RESOURCES
Physical
Intellectual (brand patents, copyrights, data)
Human
Financial

Value Propositions

What value do we deliver to the customer?
Which one of our customer's problems are we helping to solve?
What bundles of products and services are we offering to each Customer Segment?
Which customer needs are we satisfying?

CHARACTERISTICS
Newness
Performance
Customization
"Getting the Job Done"
Design
Brand/Status
Price
Cost Reduction
Risk Reduction
Accessibility
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?

EXAMPLES
Personal assistance
Dedicated Personal Assistance
Self-Service
Automated Services
Communities
Co-creation

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 PHASES
1. *Awareness*
   How do we raise awareness about our company's products and services?
2. *Evaluation*
   How do we help customers evaluate our organization's Value Proposition?
3. *Purchase*
   How do we allow customers to purchase specific products and services?
4. *Delivery*
   How do we deliver a Value Proposition to customers?
5. *After sales*
   How do we provide post-purchase customer support?

Customer Segments

For whom are we creating value?
Who are our most important customers?

Mass Market
Niche Market
Segmented
Diversified
Multi-sided Platform

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?

IS YOUR BUSINESS MORE
Cost Driven (leanest cost structure, low price value proposition, maximum automation, extensive outsourcing)
Value Driven (focused on value creation, premium value proposition)

SAMPLE CHARACTERISTICS
Fixed Costs (salaries, rents, utilities)
Variable costs
Economies of scale
Economies of scope

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?
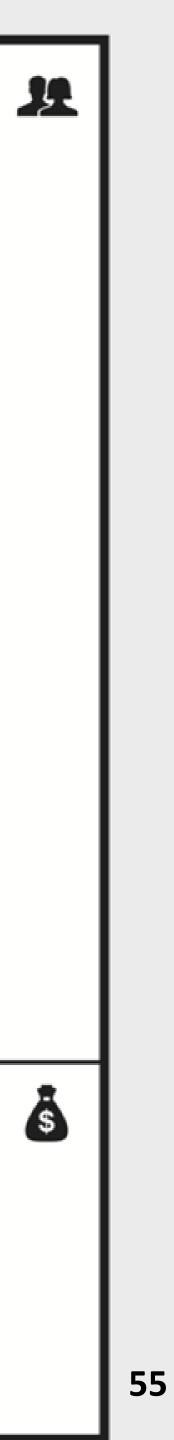
TYPES	**FIXED PRICING**	**DYNAMIC PRICING**
Asset sale	*List Price*	*Negotiation (bargaining)*
Usage fee	*Product feature dependent*	*Yield Management*
Subscription Fees	*Customer segment*	*Real-time-Market*
Lending/Renting/Leasing	*dependent*	
Licensing	*Volume dependent*	
Brokerage fees		
Advertising		

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Where to Start?

- A very clear qualitative and quantitative **understanding** of your current user experience

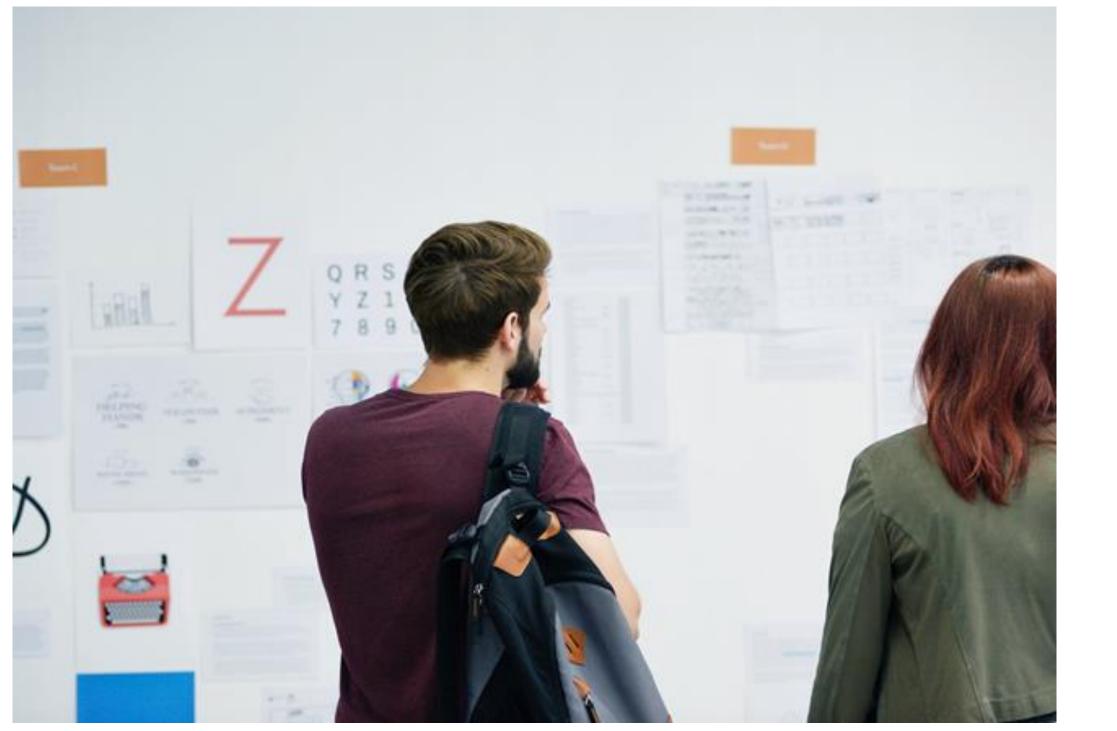- A detailed **vision** for the user experience you are trying to create

- A **business plan** that details the implementation costs and business goals

- A **UX roadmap** that lays out the specific steps to build a great user experience

- A **detailed project plan**, including staffing and schedule
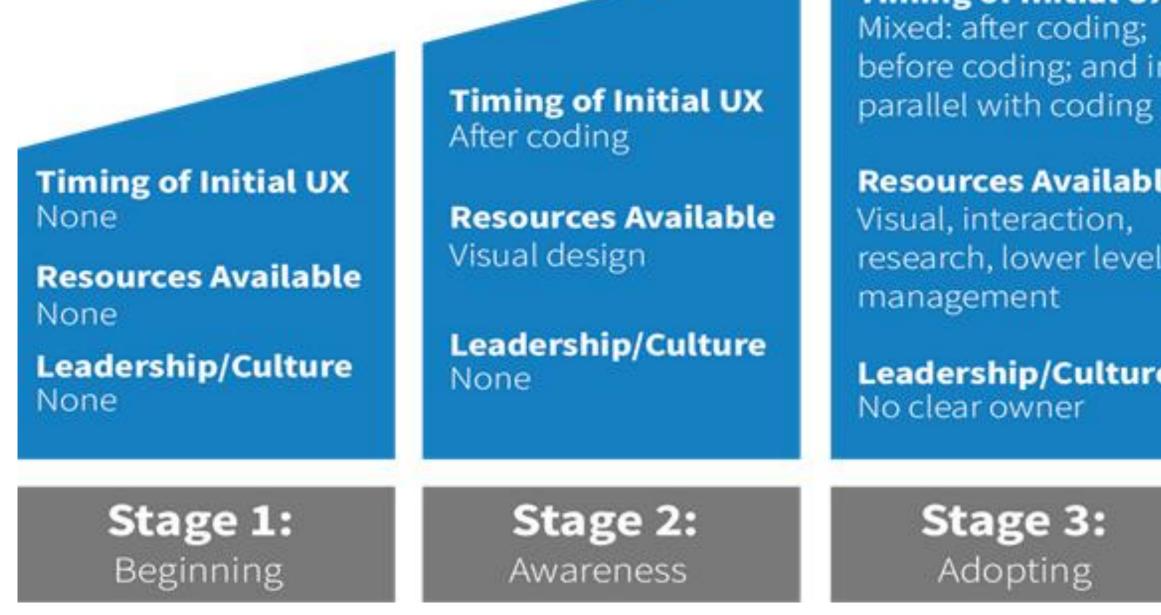
Promoting your Research

- Dissemination plan for entire organization

- Focus more on results and impact, than process

- Highlight metrics and ROI if possible

- Circle back with key stakeholders

- Always think about next steps

Organizational Maturity

Stage 1: Beginning
- **Timing of Initial UX** None
- **Resources Available** None
- **Leadership/Culture** None

Stage 2: Awareness
- **Timing of Initial UX** After coding
- **Resources Available** Visual design
- **Leadership/Culture** None

Stage 3: Adopting
- **Timing of Initial UX** Mixed: after coding; before coding; and in parallel with coding
- **Resources Available** Visual, interaction, research, lower level management
- **Leadership/Culture** No clear owner

Stage 4: Realizing
- **Timing of Initial UX** Prior to coding
- **Resources Available** Visual, interaction, research, lower and upper level
- **Leadership/Culture** Clear owner in upper management

Stage 5: Exceptional
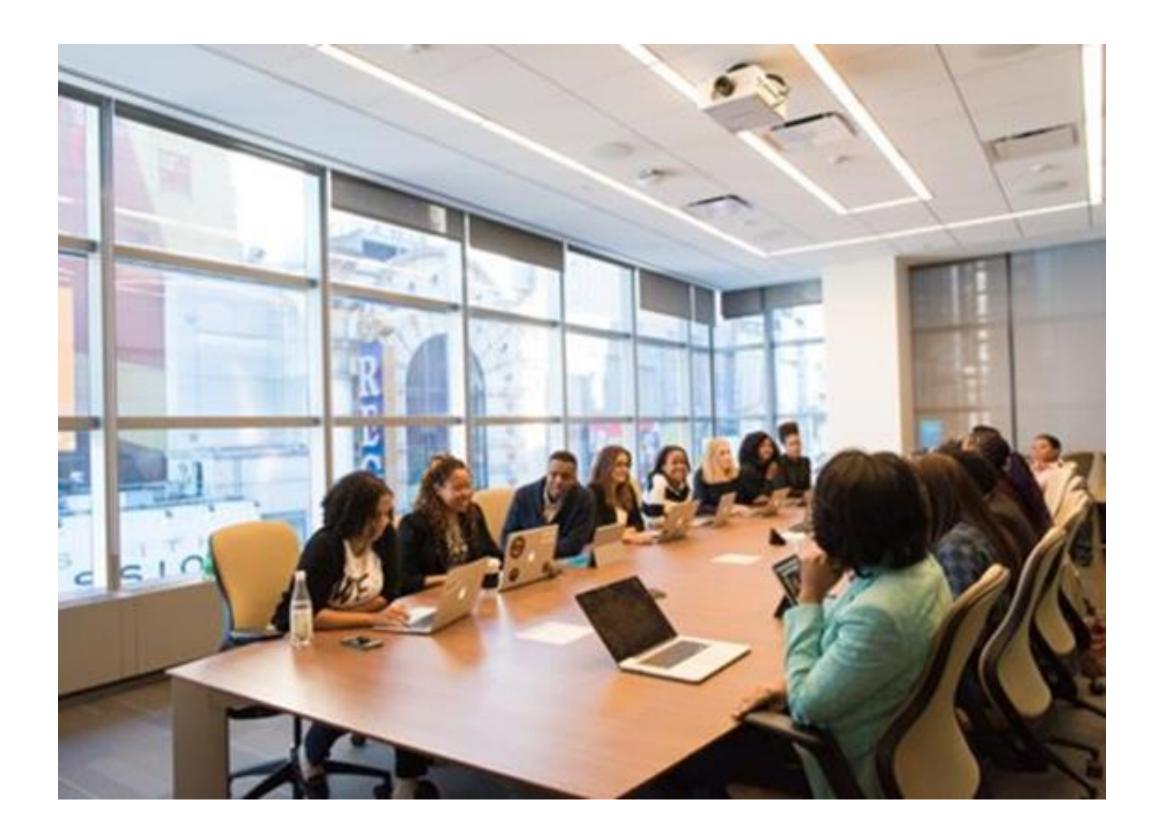- **Timing of Initial UX** As part of business and market require-ments.
- **Resources Available** Visual, interaction, research, managers, and executives
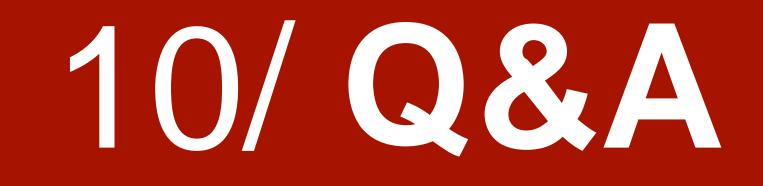- **Leadership/Culture** Clear owner and well understood and represented at executive levels

http://www.macadamian.com/learn/indicators-of-user-experience-maturity/

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Challenges in Moving up the Maturity Ladder

- Time pressure – focus on releasing products

- Limited budgets

- Does not see value – design is more visual

- No connection to ROI

- Culture not focused on end users

- Design decisions based solely on business goals

- Lack of experience / training

http://www.macadamian.com/learn/indicators-of-user-experience-maturity/

10/ **Q&A**

Thank you!

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