

## service insights & experimentation

This Tool-Kit Was Developed by Service Insights and Experimentation Division, Client Experience Branch, Immigration Refugee and Citizenship Canada

**WELCOME  
TO YOUR DESIGN  
CHALLENGE**

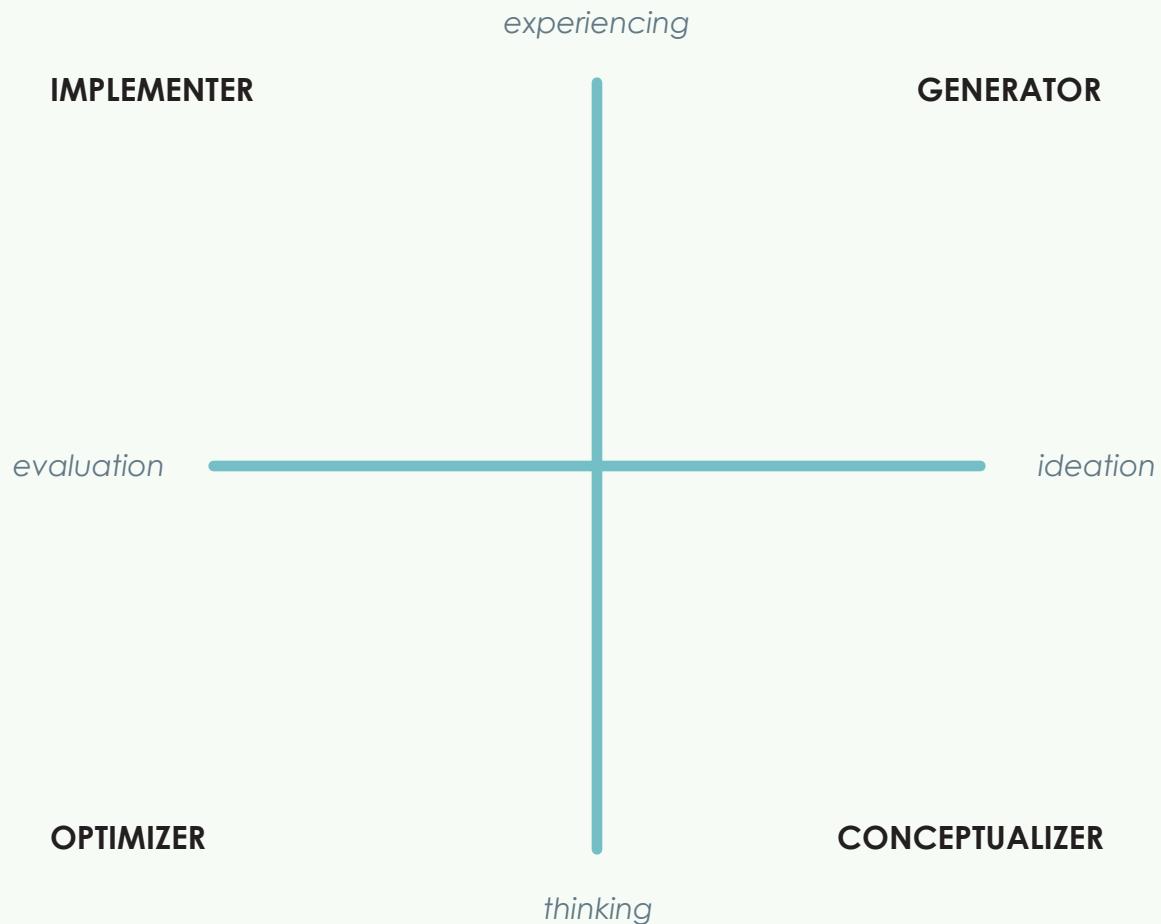
*The intention of this guide is to walk you through the service design process and provide a framework that you can follow throughout the design challenge.*

**WHAT IS YOUR  
PREFERRED  
APPROACH  
TO PROBLEM  
SOLVING?**

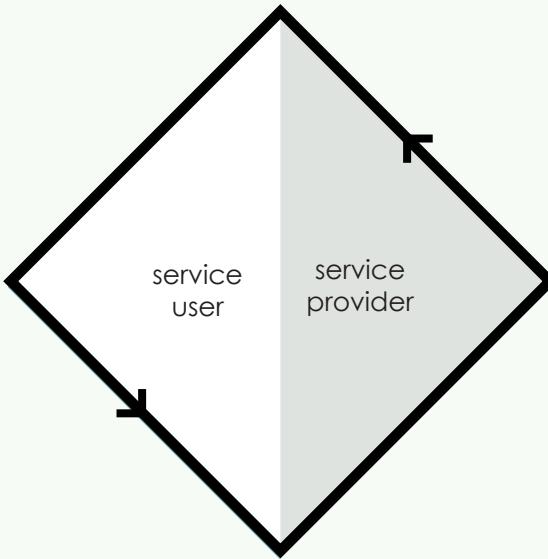
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*Draw your Basadur profile and note down which quadrant is your strongest orientation. What does this say about your strengths and weaknesses?*

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# WHY SERVICE DESIGN?



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Service design organizes people, infrastructure, and communication to improve relationships between service providers and people.

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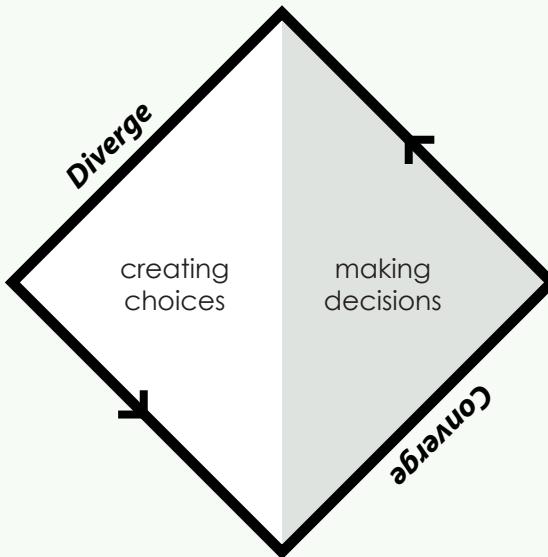
#### **OPERATIONAL NEEDS**

Technology-centred  
Standardization  
Efficiency  
Evidence

#### **DESIGN NEEDS**

Human-centred  
Variation  
Experience  
Narratives

**CREATING  
CHOICES BEFORE  
MAKING  
DECISIONS**



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Divergence and convergence are modes of thinking, used as part of a creative process to define and solve problems.

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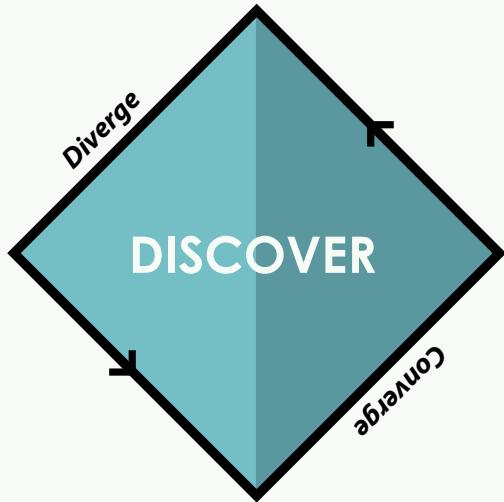
### **DIVERGENCE IS ABOUT CREATING CHOICES.**

Use your creativity  
Defer judgement  
Quantity  
Express your ideas freely  
Create without constraints

### **CONVERGENCE IS ABOUT MAKING DECISIONS.**

Use logical thinking  
Introduce critical judgement  
Quality  
Evaluate ideas against criteria  
Turn ideas into reality

# A DYNAMIC PROCESS.



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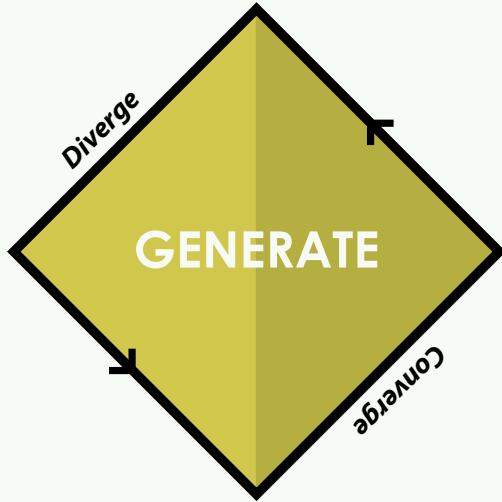
*What difficulties do people face and what do they need?*

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**KEY GOALS**  
Context and insight

**KEY ACTIVITIES**  
Personas  
Journey maps  
Pain points

**KEY OUTCOME**  
How might we questions



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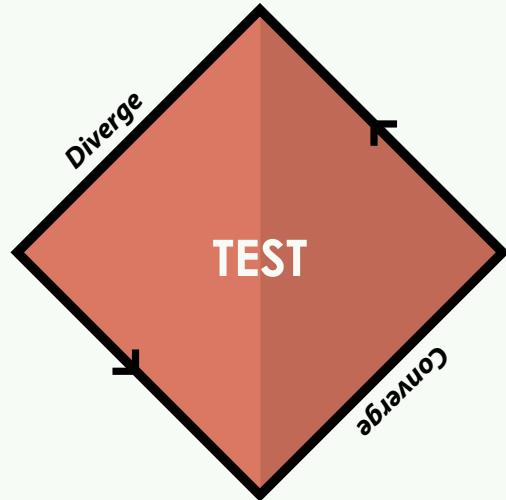
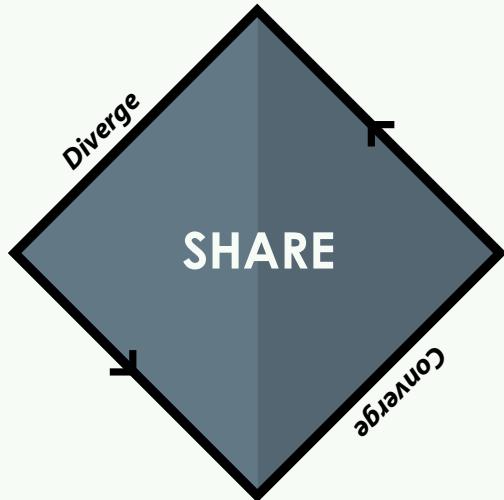
*How can you make their experience better?*

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**KEY GOALS**  
Ideas and prototypes

**KEY ACTIVITIES**  
Ideation  
Rapid prototyping  
Service blueprints

**KEY OUTCOME**  
Service pitches



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How do you communicate your improvements?

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**KEY GOALS**  
Engagement and culture

**KEY ACTIVITIES**  
Storyboards  
Videos  
Placemats

**KEY OUTCOME**  
Visualization

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How can you tell if the change you made helped?

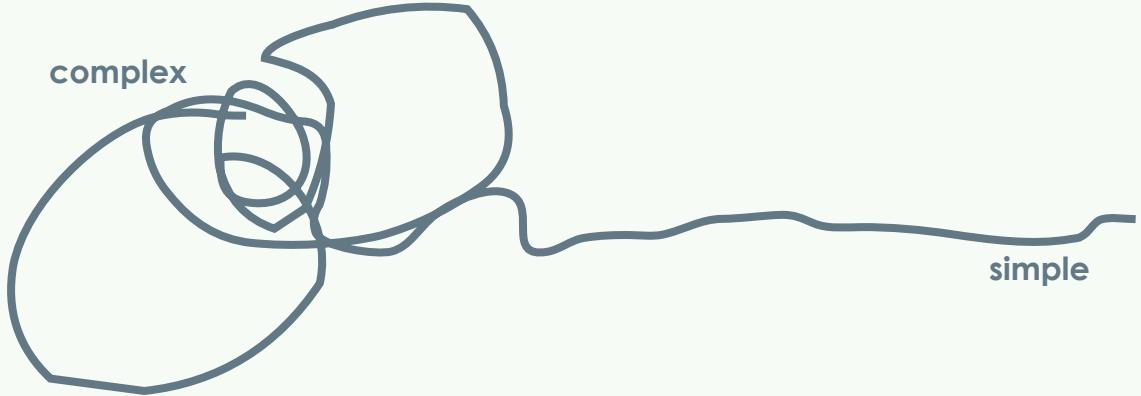
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**KEY GOALS**  
Results and metrics

**KEY ACTIVITIES**  
Randomized control trials (RCTs)  
A/B testing  
Guerrilla usability testing

**KEY OUTCOME**  
Impact measurement

**TRUST THE  
PROCESS EVEN  
WHEN IT FEELS  
UNCOMFORTABLE**



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*Wicked problems have a high level of ambiguity, confusing and contradictory information, and often involve users and decision-makers with conflicting values and interests.*

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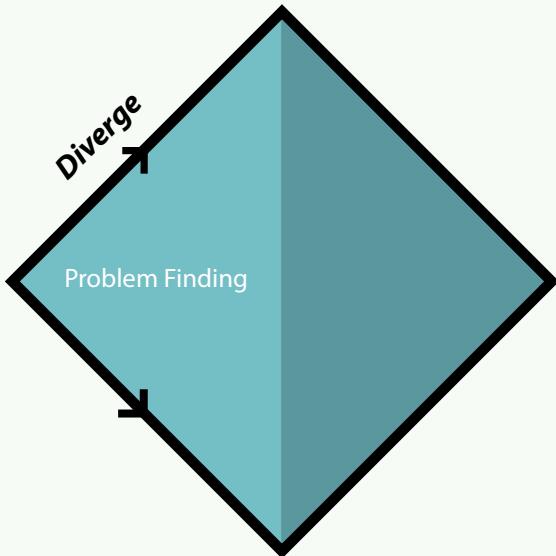
# DISCOVER

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*“If I’d asked my customers what they wanted,  
they’d have said a faster horse.”*

- Henry Ford

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What difficulties do people face and what do they need?

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#### **PROBLEM FINDING**

Gain a clear understanding of the situation from the perspective of current and potential users.

Deferring judgement  
Listening  
Observing  
Engaging

DIVERGENCE IS ABOUT  
CREATING CHOICES.



# SECONDARY RESEARCH

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# SECONDARY RESEARCH

*Understand what has already been said and done*



## CONSIDERATIONS

### TIME

2 weeks-1 month

### TYPE

Problem finding

### BENEFITS

Learn best practices

Understand past mistakes

## INSTRUCTIONS

- 01** Once you know your scope or line of inquiry, it's time to start learning about its broader context. You can learn quickly by exploring the most recent news and publications in the field. Search through newspapers, magazines, or academic journals to get a sense of what knowledge already exists on the topic. Don't limit yourself to print media; documentaries and radio journalism can also be a great source of information.
- 02** Try to find literature specifically on service delivery related to your topic. What worked? What didn't? Are there any ideas that feel similar to what we might be able to design? Any solutions that have inspired you to make one of your own?
- 03** Because interviews can be highly subjective, use your secondary research to get the facts and figures you'll need to understand the context of your challenge.

## TIPS & TRICKS

Try to find recent examples of innovation or experimentation. They could be technological, behavioral or cultural in nature. Understanding the cutting edge of the sector will help you ask great questions and imagine what's possible.



# INTERVIEWS

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# INTERVIEWS

*Listen to experiences*



## CONSIDERATIONS

### TIME

60-90 minutes

### TYPE

Problem finding

### BENEFITS

Capture powerful quotes  
Explore personal nuances

## INSTRUCTIONS

- 01 To identify your sample, establish the scope of what you would like to investigate and what resources are available. Consider where, when and how to conduct the interview.
- 02 Communicate the purpose of the study to potential participants, inform them of any risks associated and seek their verbal consent before starting the interview.
- 03 Use structured, easy questions to answer and work your way into more open and personal inquiries. Use probes to follow up such as "How so?" or "Can you tell me more?" This will help you gain a deeper understanding.
- 04 Listen carefully to your participants and record what you hear in detail. Be sure to capture powerful quotes and record them between quotation marks. Working in teams of two - one to interview, one to take notes and observe - is recommended.

## TIPS & TRICKS

Fact-based and behavioural questions do not constitute public opinion research and can give you more meaningful input. For example, don't use: "How was your experience?" Instead you should use, "Did you find everything you were looking for?" Ask them about their experiences, not their opinions on public policy.



# OBSERVATIONS

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# OBSERVATIONS



*Capture behaviours and environmental context*

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## CONSIDERATIONS

### TIME

60-90 minutes

### TYPE

Problem finding

### BENEFITS

Create research artifacts  
Observe service directly

## INSTRUCTIONS

- 01 Organize site visits relevant to the topic being researched.  
Where can you observe how people use the services? Are there related sites that can give you additional insight?  
Consider peak times to maximize your observations.
- 02 Have a framework to document what you see. One example is the ATONE method - actors, touchpoints (also known as interactions), offerings, needs and experiences.
- 03 Document what you see. Combine mediums to document your observations when possible. Take photographs, sketch scenarios, draw the service flow and write notes.

## TIPS & TRICKS

Context can change behaviours and actions. For example, when conducting site visits, consider both peak and low periods. You should conduct site visits over a time span that allows you to observe various conditions to see how behaviours may or may not change as a result.



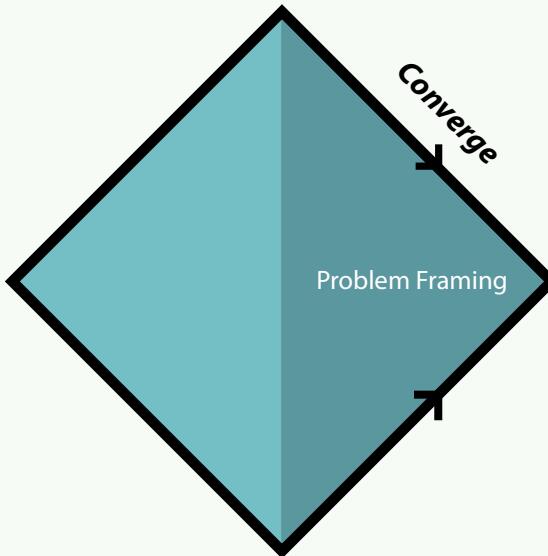
# DISCOVER

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*“The real voyage of discovery consists not in seeking new landscapes but in having new eyes.”*

- Marcel Proust

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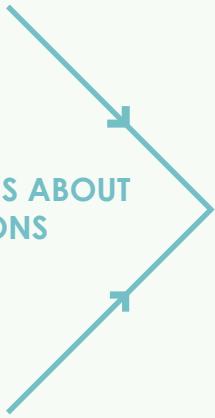


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What difficulties do people face and what do they need?

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CONVERGENCE IS ABOUT  
MAKING DECISIONS



#### **PROBLEM FRAMING**

Make sense of everything that you've heard and identify opportunities for design.

Introducing judgement  
Analyzing  
Synthesizing  
Reflecting

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# AFFINITY MAP

# AFFINITY MAP



*Find patterns and themes in your data*

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## CONSIDERATIONS

### TIME

1-2 days

### TYPE

Problem framing

### BENEFITS

Create themes

Get the big picture

## INSTRUCTIONS

- 01 Record as many observations or notes from your research as you can on individual post-it notes. Be sure to write clearly and legibly so that your colleagues can read them.
- 02 Use a large, blank wall to put up all the individual post-it notes. Consider using large format paper in case you would like to take the affinity map down or move it.
- 03 Interpret the notes and consider the underlying significance of each. Notes that share a similar intent, problem or issue - or that share an affinity - can then be clustered together. From this, a story will begin to emerge of the people who use our services and the nature of their problems.
- 04 Be sure to take pictures to record the progress along the way, should you ever want to revisit.

## TIPS & TRICKS

As you look for commonalities and repetition to identify overarching themes, also be sure to look for anomalies. They may be rare errors, but they could also point to problems that are particularly detrimental to a specific type of user.



## PERSONA A

Age: 33

F

Occ: Tim Horton's  
◆◆◆◆

## JUSTINE

SINGLE MOTHER

3 CHILDREN, 1 SPECIAL NEEDS

AUSTRALIAN

NO COMPUTER ACCESS

dyslexic

SPONSORED BY CANADIAN EX

MOTIVATION. Wants to be Canadian like her children  
FOR  
CIT .

"I am working night shifts, don't have  
the resources (time+money) to go through  
processes"

### BEHAVIOUR SCALES:



### PAIN POINTS:

- LACK OF SUPPORT
- COST OF PROCESS
- IN FLEXIBLE DATES
- UNCLEAR PROCESS LEADS TO UNCERTAINTY

### METAPHOR:

# PERSONAS

# PERSONAS



*Identify user archetypes and build characters to represent them*

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## CONSIDERATIONS

### TIME

1-2 days

### TYPE

Problem framing

### BENEFITS

Identify user archetypes

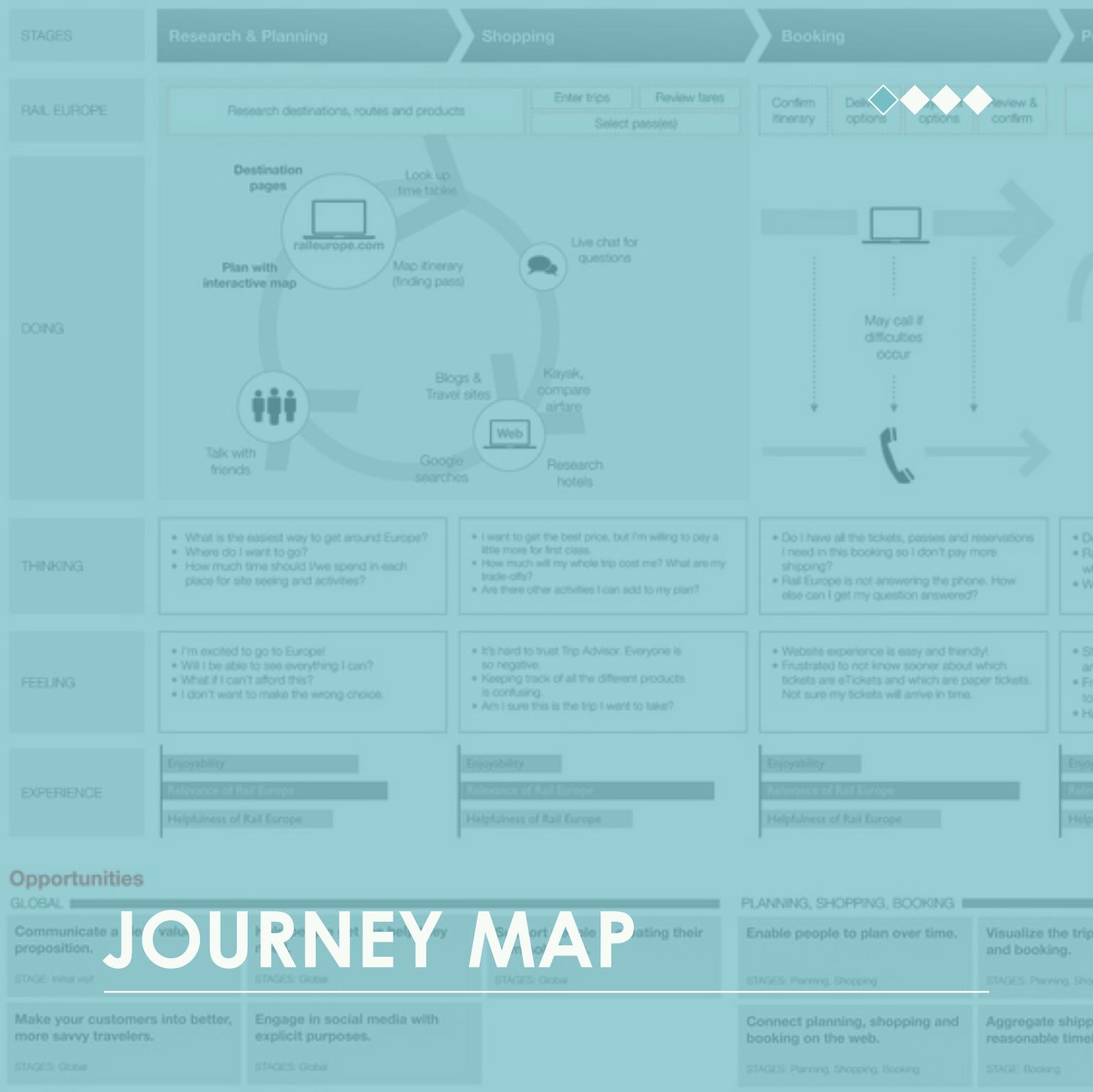
Explore nuances

## INSTRUCTIONS

- 01** This activity seeks to group people by behavioural patterns. This helps you to resist the urge to assume users are a monolith or segment users defined only by rigid biographical identifiers like age and gender.
- 02** First, find out what's driving people's behaviour. What is moving people to behave in certain ways? Use the data to help you identify common behavioural patterns.
- 03** Create three to five character archetypes - or personas - based on these behavioural patterns. Give each persona a name, a short biography, and provide a narrative that explains their life situation, goals and behaviours.

## TIPS & TRICKS

Base your personas on real people you've heard from during your interviews and use quotes to highlight their experiences and frustrations. Consider both extreme and mainstream users. What works for extreme users often works for the mainstream as well.



# JOURNEY MAP



*Visualize the experiences people have when interacting with our services*

## CONSIDERATIONS

### TIME

1-2 days

### TYPE

Problem framing

### BENEFITS

See the user's full experience  
Identify high and low points

## INSTRUCTIONS

- 01 Pick a persona whose journey you'd like to bring to life. Find a large, blank wall to place your map. Establish the various stages that persona would go through. Be sure to consider the entire process from beginning to end.
- 02 For each stage, lay out all of the persona's actions. Consider all the touch points the persona would use at each phase, such as reaching out to friends and family, contacting the call centre or checking the website.
- 03 Below the row for the persona's actions, lay out the persona's thoughts and feelings for each stage in discrete rows. Be as honest as possible. Include both moments of indecision and confusion, as well as delight and closure.

## TIPS & TRICKS

Once you have most of the information you'd like to map in place, step back and take in the big picture. What do you see? At which points does your persona get stuck? Where are they most content? This will help spur thinking on which areas need the most improvement in the next phase when you are generating ideas.



HOW MIGHT WE?

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# HOW MIGHT WE?



*Turn the problems you've identified into opportunities for design*

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## CONSIDERATIONS

**TIME**

0.5 day

**TYPE**

Problem framing

**BENEFITS**

Make opportunities

Turn towards new ideas

## INSTRUCTIONS

- 01** Look through the insights you've developed in the other problem framing exercises. See if any can be transformed by reframing them as questions. Add "How might we" at the beginning. Build as many as you can!
- 02** Look at your How Might We questions and see if they lend themselves to a wide range of solutions. If they don't, try to rephrase them into a broader question.
- 03** Be sure not to make your How Might We questions too broad. It is a tricky balancing act: the objective is to make them broad enough to allow for adventurous ideas, but also specific enough that you know where to start your brainstorming.

## TIPS & TRICKS

Stand in front of the posters and wall spaces that you've created products from the other problem framing exercises. Read through them and see if you can pull out a specific feeling that users are looking for or lacking. Is there a specific place or time that the feeling happens? Try to turn it into a How Might We question.



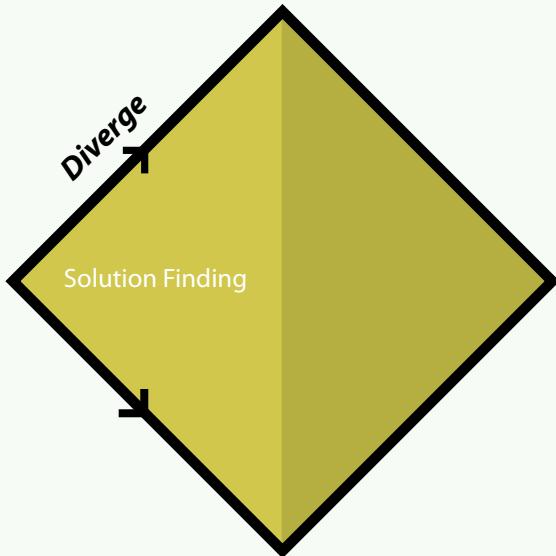
# GENERATE

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*“The best way to have a good idea is to have lots of ideas.”*

- Linus Pauling

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How can you make their experience better?

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#### **SOLUTION FINDING**

Consider all the possible solutions without shooting down ideas that 'don't make sense' and without introducing constraints.

Deferring constraints  
Ideating  
Conceptualizing

**DIVERGENCE IS ABOUT  
CREATING CHOICES.**



# ANALOGY CARDS

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# ANALOGY CARDS



*Use analogy cards to jolt you into thinking differently and get inspired*

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## CONSIDERATIONS

### TIME

1 day

### TYPE

Solution finding

### BENEFITS

Consider different scenarios  
Spark inspiration

## INSTRUCTIONS

- 01 First, pick a persona that the team developed in the discover phase. Second, pick a part of that persona's journey map. Third, pick a How Might We question.
- 02 Once you've chosen these three elements, pick an analogy card. These cards will detail either scenarios, analogies, or future states. Finally, generate ideas that fit the combination of the three elements you've chosen and the analogy card you've picked.
- 03 Once you've generate a number of ideas for the combination, start the process over again!

## TIPS & TRICKS

Don't worry about making your ideas perfect or working out every detail, the name of the game at this stage is quantity of ideas, not quality.



# MANDAL ART



*Build dozens of solutions for each theme you've identified*

## CONSIDERATIONS

### TIME

1 day

### TYPE

Solution finding

### BENEFITS

Connect solutions to themes

Stay organized

## INSTRUCTIONS

- 01 Pick a theme from your analysis that is ripe for generating solutions. Write the theme in the middle of a piece of poster paper.
- 02 Think about eight concepts or aspects of the theme that can be the basis to cluster specific solutions. Don't worry about making all the concepts the same type, pick whatever best suits the theme. Write down the eight concepts in a clockwise pattern around your theme.
- 03 For each concept, develop about eight solutions that would improve the user's experience. Cluster your solutions near the concept. Step back and you should see a circular pattern with the theme in the centre surrounded by concepts and solutions on the periphery.

## TIPS & TRICKS

Once you're done, step back from your mandal art. Do you notice any patterns? Are there any solutions that stand out as exceptional? Are there any synergies that you can make between two or more solutions?

英吉利 美好  
EGLIN

# PRINCIPLES TO OPPORTUNITIES



廿二  
年  
己未  
歲  
夏  
月  
日

# PRINCIPLES TO OPPORTUNITIES



*Explore opportunities and gain insights before generating ideas*

## CONSIDERATIONS

### TIME

1 day

### TYPE

Solution finding

### BENEFITS

Identify opportunities

Structure your ideas

## INSTRUCTIONS

- 01 Create a table to explore opportunities. In the first column, list all the insights that were found in the research and analysis phase. In the second column, write the corresponding design principle for every insight. Design principles are the core principles that underpin the themes you've found. For example: "People want reassurance throughout the process."
- 02 In the next three columns, establish the individual, system and strategic opportunities that each design principle presents. Be sure to think them through in that order so as to build towards to the big picture.
- 03 View all the opportunities together and gain insights. Are there ways to build the individual, system and strategic opportunities together? Do any opportunities stand out?

## TIPS & TRICKS

Here's an example if you're having trouble getting started. If during the research phase you found that people generally don't read instructions (your insight), then the corresponding design principle could be: "Make the process so intuitive so people don't need instructions."



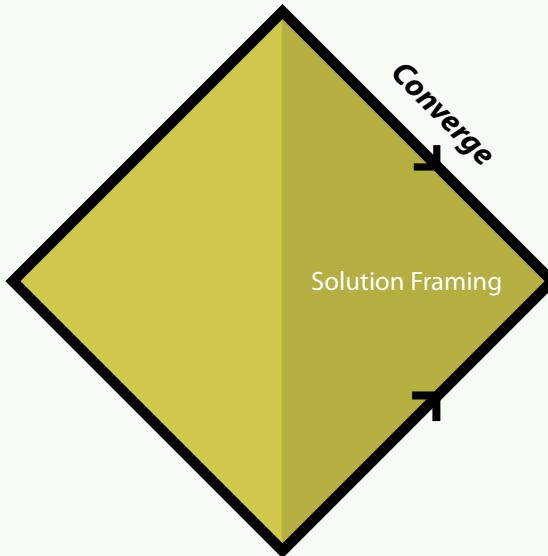
# GENERATE

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*“The ability to simplify means to eliminate the unnecessary so that the necessary may speak.”*

- Hans Hofmann

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How can you make their experience better?

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CONVERGENCE IS ABOUT  
MAKING DECISIONS

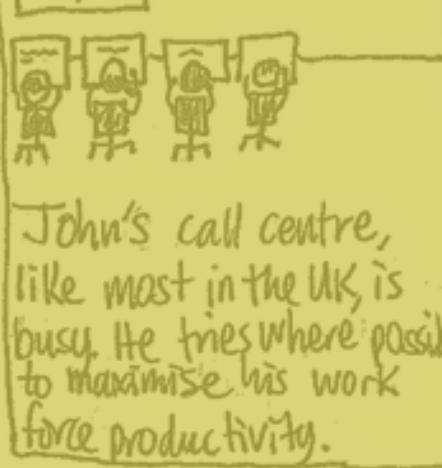
#### SOLUTION FRAMING

Analyze your options, draw connections between ideas and consider how real world constraints interplay with your solutions.

Introducing constraints  
Prototyping  
Optimizing

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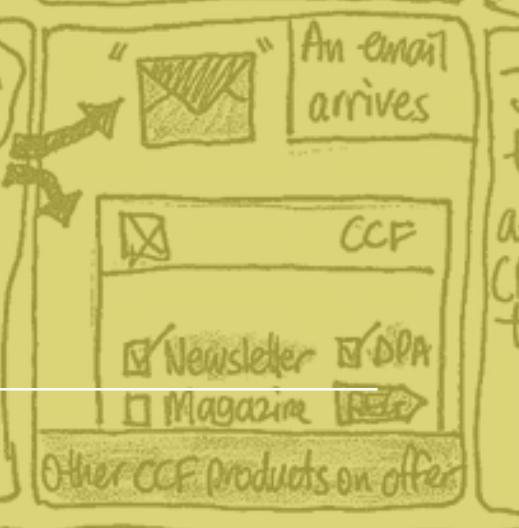
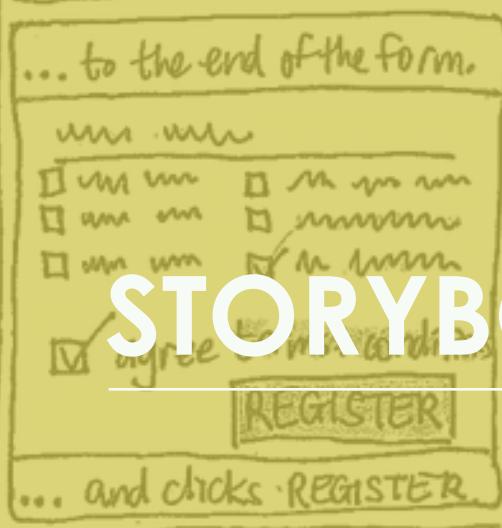
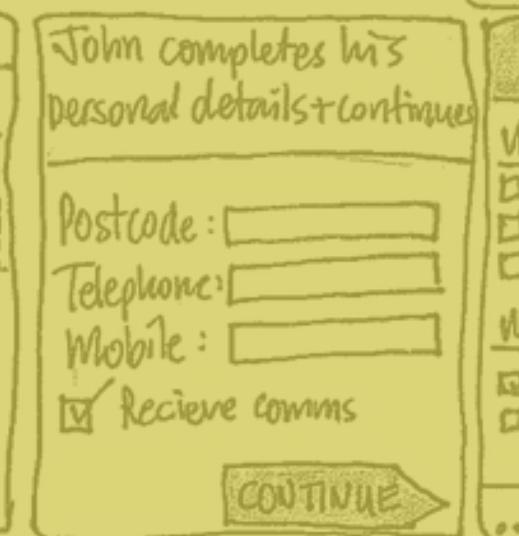
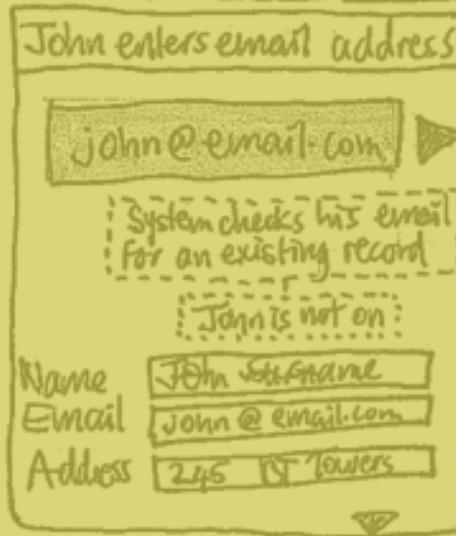
Customer Services manager at BT. John relies on online resources for up-to-date information to help him manage his team and day-to-day activities...



John's call centre, like most in the UK, is busy. He tries where possible to maximise his work force productivity.



John launches Google.com



# STORYBOARD

# STORYBOARD



*Visualize your concept from start to finish*

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## CONSIDERATIONS

### TIME

1 day

### TYPE

Solution framing

### BENEFITS

Tell a story

Capture emotions

## INSTRUCTIONS

- 01 Determine what part of your idea you want to storyboard.
- 02 Quickly draw how your idea works. Use a series of comic book-style frames or make your own. This will help you spotlight key moments and build a narrative. Try to keep your drawing time to 30-45 minutes so you can quickly get feedback and adapt.
- 03 Don't worry about your drawing abilities. It's more important that it helps you fully think through your concept than create something that looks beautiful.
- 04 Once you're done, act out the storyboard to your team for feedback and adapt accordingly.

## TIPS & TRICKS

You don't have to storyboard the entire user experience. Instead, just tell a component of the story. This will be more succinct and more compelling than trying to capture every little detail.

Edit Search Table  
TEXT



A	B	C
0123	23	
1000	555	

Test  
TEXT

# PUGH MATRIX



# PUGH MATRIX



*Evaluate the solutions and find your home-runs*

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## CONSIDERATIONS

### TIME

Half day

### TYPE

Solution framing

### BENEFITS

Prioritize your ideas

Evaluate evenly and fairly

## INSTRUCTIONS

**01** Identify and clearly define criteria for success. Use these criteria to evaluate your team's ideas (ex. value to clients). These criteria should fall under three broad categories: desirability to users, operational/technical feasibility and bureaucratic/political viability.

**02** To build your matrix, first stack your criteria vertically for your row headers. Then place your ideas horizontally to define your column headers. Now evaluate each idea against the criteria! If the idea rates highly on a criteria (say, cost effectiveness), assign a positive value (ex. +2); if it negatively affects a criteria, assign a negative value (ex. -2).

**03** As not all criteria carry the same importance, you may wish to weigh some criteria more heavily than others. Factor in the weighting, then add up the points for each idea.

## TIPS & TRICKS

Remember to define your criteria in positive terms. For example, "risk to program integrity" should be renamed "support to program integrity". This will ensure that all positive values (+1, +2) will count towards the idea, while negative values (-1,-2) will count against the idea.



# RAPID PROTOTYPES

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# RAPID PROTOTYPES



*Make your idea tangible and test it with people*

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## CONSIDERATIONS

### TIME

1 day

### TYPE

Solution framing

### BENEFITS

Make it tangible

Test it with clients

## INSTRUCTIONS

- 01 Once you've determined what to prototype, it's time to build it! You can make any number of prototypes: storyboards, role playing, models, mock-ups. The goal here is to make something tangible that conveys the idea you want to test.
- 02 Now take your prototype out and test it with people who would use it. Give it to them to use and ask them what they make of it. Make sure to get feedback.
- 03 Here is where you integrate feedback and iterate. Once you've quickly built another prototype, you'll do it all over again until it's just right.
- 04 Remember: your first idea is not the best idea. Think of people's feedback not as critical, but as crucial to moving this forward.

## TIPS & TRICKS

No need to make it perfect, just make it good enough to get the idea across. Not only does this ensure you are able to build quickly, but it also helps you not become too attached to an idea that might not be ideal.