FORGE
SERVICE
LAB

FORGE Service Lab

Service Design Toolkit

DEFINE　　LEARN　　EXPLORE　　BUILD　　GO LIVE　　MEASURE
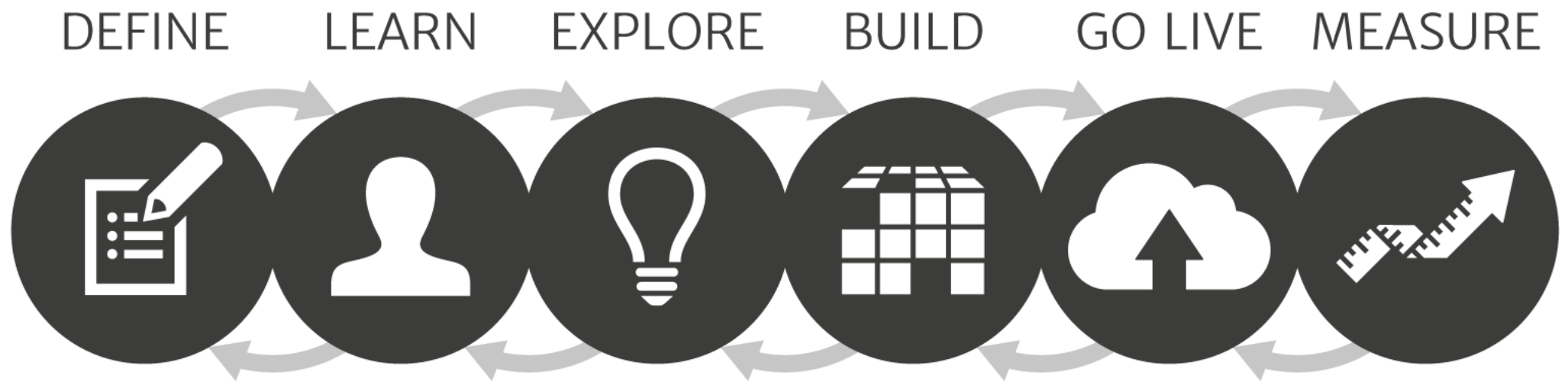
FORGE SERVICE LAB PROCESS

FORGE Service Design Toolkit

What? */What is this?*

- This is a toolkit that follows the Service Design framework of FORGE Service Lab (i.e. the *Learn* and *Explore* phases)
- It gives valuable tools for service development and opens up the theory and meaning behind them
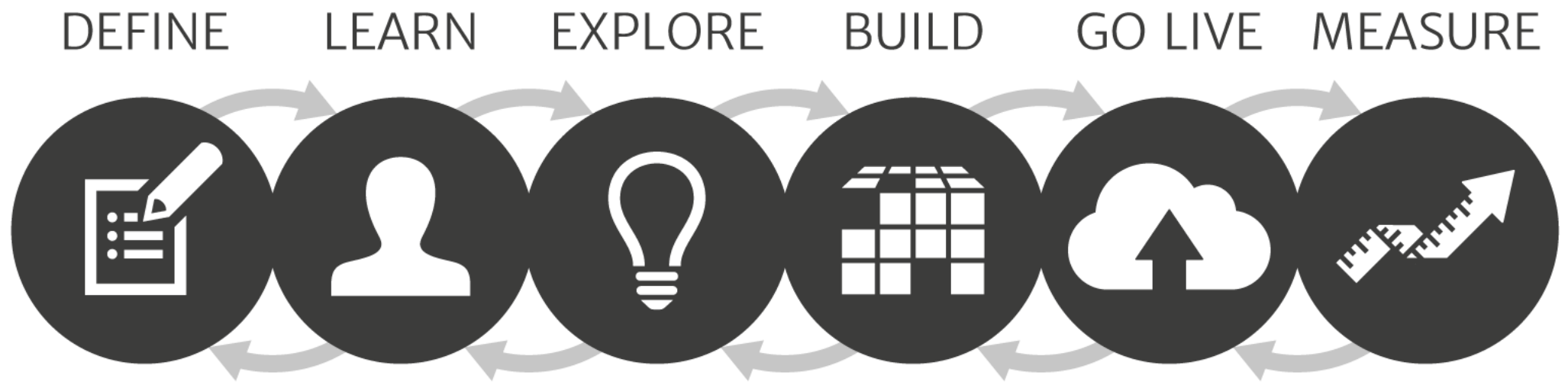
Why? */Why do we have this?*

- This toolkit helps you to get the results needed to advance to the *Build* phase (i.e. software development)
- It makes sure you have deep understanding of the customer and have created potential concepts that have risen from that understanding
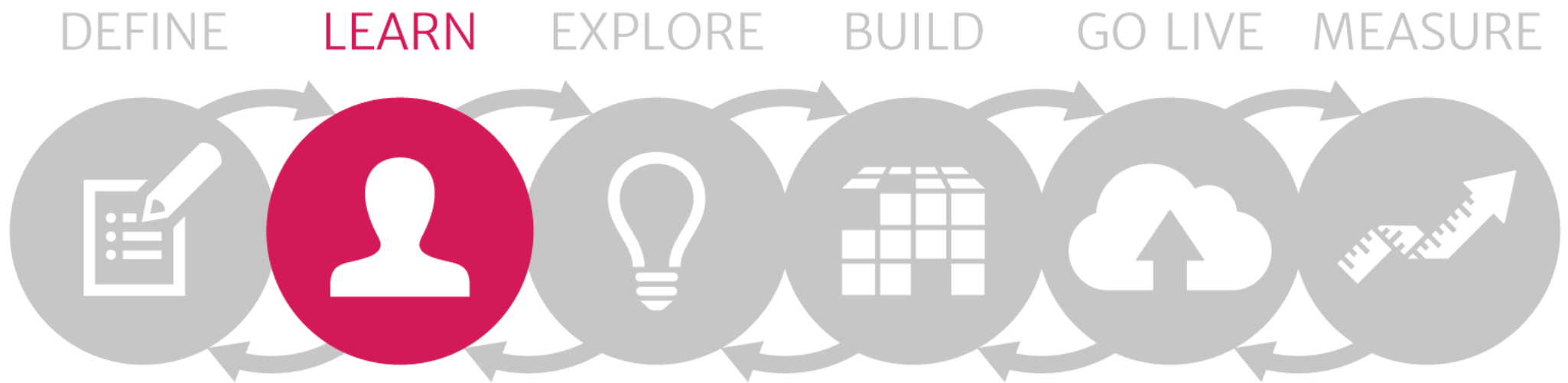
How? */How are we using this?*

- Use the most suitable tools needed to get profound results (*Outcomes*) at the end of both phases (*Learn* & *Explore*)

! *There's no need to go through every single tool − results matter and tools are here to help!*

DEFINE   LEARN   EXPLORE   BUILD   GO LIVE   MEASURE

FORGE SERVICE LAB PROCESS

DEFINE   LEARN   EXPLORE   BUILD   GO LIVE   MEASURE

FORGE SERVICE LAB PROCESS

What? /What happens in this phase?

- *Identifying* the relevant context, customers and resources
- *Understanding* how the customers live and think
- *Transcribing* the gathered information by digitizing and organizing it
- *Analyzing* the transcribed information and summarizing it
- Delivering *Outcomes* that have condensed the results of the *Learn* phase

Why? /Why are we doing this?

- To ensure that that there is all the material needed in order to create concepts that rely on concrete customer centered information

How? /How are we doing this?

- Using the tools provided to create the *Outcomes* that are needed in order to proceed to the *Explore* phase

1. IDENTIFY

What? */What happens in this step?*

- Identifying the relevant *customers*, *context* and *resources* needed to tackle the challenge defined in the *Design Brief* (created in the *Define* phase)

Why? */Why are we doing this?*

- Enables the planning of the next steps
- Helps to understand the overall context where the service is used

How? */How are we doing this?*

- *Design Brief*
- *Stakeholder Map*
- *WWWWW&H*
- *Proto Personas*
- *Benchmarking*

Customers   Context   Resources

Design Brief

What? */What is this tool?*

- Description of the design context; what are the reasons and the goals for the project
- **Created** at the end of the previous phase (*Define*) and **updated** to current information before proceeding to the *Explore* phase

Why? */Why are we using this?*

- Frame for design process that will be referred to and refined throughout the process
- Helps to review and re-focus if unsure about the current direction of the project

How? */How are we using this?*

- Fill out the *Design Brief* with your project team
- Update the information at the end of the *Learn* phase (i.e. before proceeding to *Explore*) and when necessary

LEARN \ 1. IDENTIFY \ *Design Brief*

Design Brief

2/2

Headline	What is the name of this project?
Short summary of the design context	What is the project all about and the reasons *Project was launched in order to... improving an old service, creating a new service...*
Business and customer goals	What should be achieved from the business and customer perspective? *Sales, market share, schedule, channels, problems, needs...*
Goals and responsibilities for *Learn* and *Explore phases*	What should be achieved in these phases? *Why should they be done? Who are part of this project? What are their responsibilities? How do we know if the project is successful?*
Target customers	Who are the people relevant to the design context? *Customer, user, buyer, seller...*
Key Performance Indicators (KPI)	How do we measure the results of the design process? *Amount of contacts, sales, clients, health, happiness...*
What else?	*Deadlines, budget, resources..?*

Stakeholder map

What? */What is this tool?*

- Stakeholder is someone who has something to gain or lose from the service – person or organization
- Stakeholder map is a visualization of the stakeholders related to the design context and the relationships between them
- Can also visualize
  – Inner and outer factors (laws, culture, politics...)
  – People, organizations and corporations

Why? */Why are we using this?*

- To see the big picture and understand how the stakeholders are linked to each other

How? */How are we using this?*

1. IDENTIFY all known stakeholders using *Brainstorming* techniques
2. GROUP by finding the common nominators between different stakeholders
   (using e.g. *Affinity diagram*)

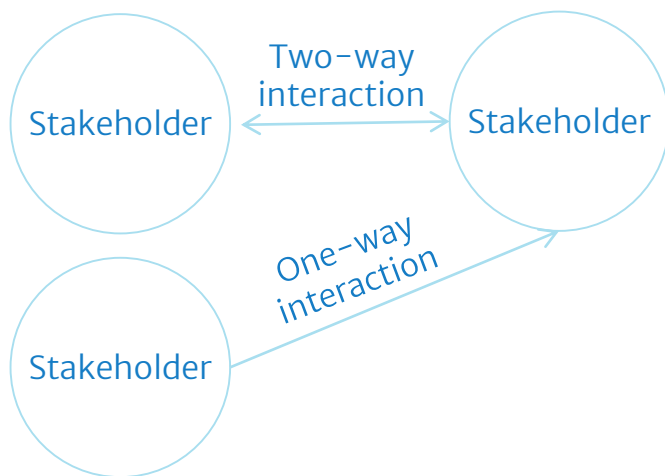   *You can also!*

   2.1 PRIORITIZE if you want to emphasize the importance between stakeholders

   2.2 LINK in order to see the relationships between the stakeholders

1. ITERATE until the structure is commonly approved
2. VISUALIZE in order to capture the common understanding

Stakeholder map

Ways to visualize – examples

Two-way interaction

Stakeholder ⟷ Stakeholder

One-way interaction

Stakeholder

Mind map

Low priority

Moderate priority

High priority

Onion diagram

- Key customer / organization
- Service context

Group 1   Group 2

Group 3
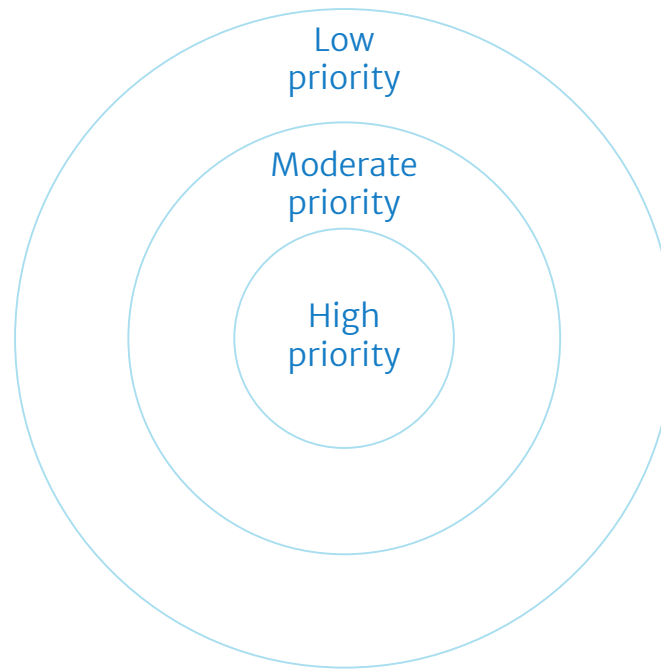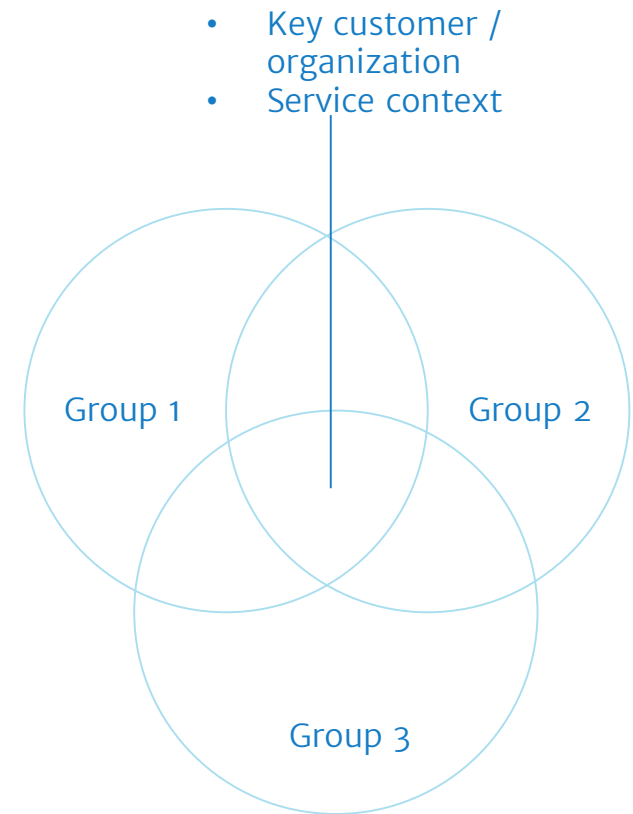
Venn diagram

! You don't have to visualize everything, only the things that matter.
Choose the visualization type that fits your purpose

WWWWW&H

What? /What is this tool?

- Deconstruction of the design challenge/context using simple questions as a framework

Why? /Why are we using this?

- Systematical way to analyze and clarify the design context
- Helps preparing for the interview(s)/ gathering of customer insight
- When done collaboratively enables the project team to achieve a common understanding

How? /How are we using this?

1. Write down the initial design challenge/context
2. Ask the *WWWWW&H questions* and answer them with your best knowledge
3. Review the answers and indicate where you need more information
4. Prioritize the information needed and validate why
5. Rewrite design challenge/context if needed

WWWWW&H

WHO?

Who are the customers/stakeholders related to the design context?
End-users, buyers, users, experts, lead-users, crucial users, influencers, administrators, distributors, potential customers, decision makers, influencers, extremes, support crew/maintenance, organizations, government...

WHAT?

What is the task/job they are trying to get done?
What are the problems/challenges faced? What current solutions are there?
For information, entertainment, transportation... Too fast, slow, complicated...

WHEN?

When are the customers active in the design context?
Daily, once a month, once in a lifetime, routine, occasional, related to certain events...

WHERE?

Where would/do customers use the service? Physical and digital locations
Inside, outside, online, at certain or different places...

WHY?

Why do the customers act the way they act? What are their needs, goals, anxieties, motivations, emotional and functional drivers?
For security, social needs, entertainment, work, hobby, status, creativity...

HOW?

How do customers go through the current available service?
How do they get what they want/need?
Customer journey; before the service, after the service, how do they know about the service...

Proto Personas

What? */What is this tool?*

- Summary of the customers based on stakeholders domain expertise and gut feeling
- Identification of who the customers are, what their needs are, and how they behave
- Created in a project stakeholder workshop

Why? */Why are we using this?*

- Communication tool between the project stakeholders
    - Gets everyone on the same page and enables the use of common language
- Helps everyone to focus on the customers point-of-view early in the project
- Various stakeholder backgrounds enables a broad initial customer insight
- Helps planning the customer research
- Helps to eliminate individual biases

! *Not final information! Will be refined later as Customer Profiles*

LEARN \ 1. IDENTIFY \ *Proto Personas*

Proto Personas

How? */How are we using this?*

1. **IDEATE** all possible personas in a workshop
   - Aim for 3 or more personas per person
   - Based on personal experiences (e.g. think of people met at work!)
   - Using *Proto Persona –template*
2. Introduce created personas to others
   - Feedback and adjustments on the fly
3. **RANK** each persona based on different traits
   - Together choose *five spectrums*
     - that differentiate between the personas and are also relevant to the design context (e.g. personality type, influence in the organization, education…)
     - Draw these spectrums e.g. on whiteboard

- Rank the personas on these spectrums
  - Go through all the personas one by one
  - Place personas (names) at their places on the spectrums
    - » Use the *Voting Cards* method (scale 1–5) to agree on the place on the spectrum

4. **VISUALIZE** ~3 personas as a result
   - Merge similar personas
   - Prioritize the rest and choose three three most important personas
   - Make Proto Persona cards
   - Validate and iterate with further research into *Customer Profiles*

! *Can – and will – take multiple workshop sessions to go through all steps*

Proto Personas

IDEATE
Proto persona
-template

Biography and picture
- *Janet (name for identification!)*
- *Athletic*
- *Tech-freak*
- *Lone wolf*

Behaviours and beliefs
- *Not active in social media (as a reader or contributor)*
- *Perfectionist traits*
- *High effiency in work and private life*

Demographics
- *25-35*
- *Female*
- *College grad. MBA*
- *Work: middle management – "white collar job"*

Needs & Goals
- *Very private person*
- *Has clear goals in business life*
- *Looks for a steady family life*

! *Hand-drawn and simple WITHOUT the spectrums*

Proto Personas

	LOW				HIGH
RANK	1	2	3	4	5
Spectrum 1 (e.g. education)			Persona 1 (Janet)		
Spectrum 2 (e.g. motivation)				Persona 1 (Janet)	
Spectrum 3 (e.g. tech skills)					Persona 1 (Janet)
Spectrum 4 (e.g. fitness)				Persona 1 (Janet)	
Spectrum 5 (e.g. social influence)		Persona 1 (Janet)			

VISUALIZE

JANET
*the Lonely and Athletic Tech–freak*

25–35
Female
College grad. MBA
Work: middle management –
"white collar job"

Behaviours and beliefs
- Not active in social media (as a reader or contributor)
- Perfectionist traits
- High effiency in work and private life

Needs & Goals
- Very private person
- Has clear goals in business life
- Looks for a steady family life

education
motivation
tech skills
fitness
social influence
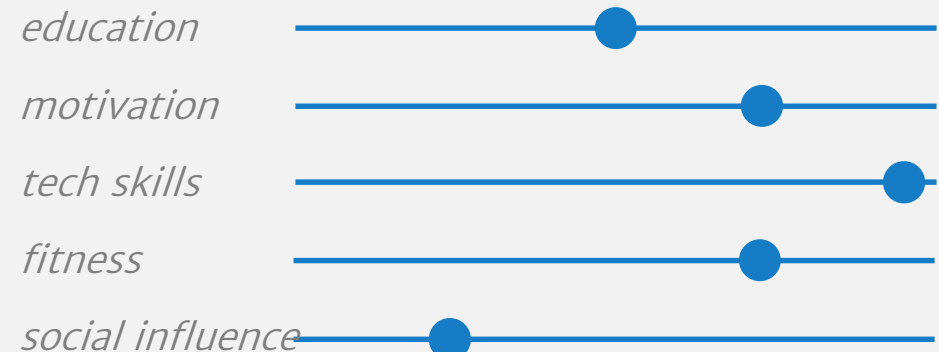
!   *Reviewed, combined and visualized WITH the spectrums*

Benchmarking

What? */What is this tool?*

- Reflective analysis of competitors and similar industries' methods of operation

Why? */Why are we using this?*

- Understand the service context
- Utilize good ideas and practices
- Avoid common pitfalls and mistakes
- Find the less competed areas
- Use methods from an entirely different field
- Know how to stand out from the others

How? */How are we using this?*

- Interview industry experts if possible
- Find information from web and literature
- Use the services yourself for practical insight
- Trend scouting, competitive service analysis, historical analysis

LEARN \ 1. IDENTIFY \ *Design Brief*

2. UNDERSTAND

What? /What happens in this step?

- Understanding how the customers live and think; what are the needs and goals the service could help to achieve?

Why? /Why are we doing this?

- The possibility of designing a successful service is higher when it's made to fulfill actual customer needs
- To know the customers motivations, context and triggers in the design context
- To create a desirable, useful, usable and pleasant service for the customer

How? /How are we doing this?

- Applying different methods of gathering information in order to get insightful, relevant and innovative customer insight
  - *Ask & Listen*
  - *Watch & Learn*
  - *Try & Create*

Ask & Listen   Watch & Learn   Try & Create
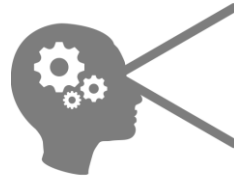
2. **UNDERSTAND**

ASK & LISTEN	WATCH & LEARN	TRY & CREATE
Interview	*Fly on the Wall*	*Collage*
Focus / Unfocus Group	*Contextual Inquiry*	*Service Safari*
Questionnaires	*Five Whys*	*Draw the Experience*
Expert Interviews	*Personal Inventory*	*Design Probes*

QUALITATIVE   *QUANTITATIVE*

Interview

What? /What is this tool?

- Face to face discussion with one or more persons, with predetermined structure and questions

Why? /Why are we using this?

- Useful in finding out the overall tasks, needs and preferences of the customer
- Get information about customers goals, reasons, priorities, values and preferences

How? /How are we using this?

- Ask open-ended questions
  - "Yes" and "No" answers are banned

- Don't make leading questions
  - x *"Is X better than Y?"*
  - ✓ *"What do you think about X and Y?"*
- Questions should be about experience not assumptions
  - x *"Would this be useful?"*
  - ✓ *"Would this be useful in your work?"*
- One subject per question
  - x *"Would this be useful before or after the service?"*
  - ✓ *"Would this be useful before the service? What about after?"*
- Don't disagree with your customers opinions – ask "Why?" and reveal the reasons!
- Be interested about your customer!
  - In verbal and body language
- If alone, use a recorder!

Ask these

- What is the problem/task you are facing? Why do you care about solving/performing it?
- What is the process you use to solve the problem?
- What alternatives do you consider when going trough this process?
- Why do you select the solution you select?
- What do you like about the solution?
- What don't you like?
- What frustrates you when you are trying to solve this problem?
- What other people are involved in this process? What is the nature of your interaction with these people?

Listen to these

- Statements of need
  - *"I want…" "I need…"*
- Attitudes
  - *"I don't usually try…" "I love this…"*
- Frustrations
  - *"I hate when…" "the worst part is…"*
- Barriers
  - *"I would, but…"*
- Statements of ideals
  - *"If only…" "I wish…"*
- Descriptions of desired attributes
  - *"This should have…" "I would add…"*
- Relative values
  - *"I would give up X to get Y…" "I care more about…"*

Focus / Unfocus Group

What? /What is this tool?

- Facilitated discussion among a small group around a specific idea, issue or a theme
- **Focus group** typically has people with similar backgrounds, in order to recognize the similarities within a target group
- **Unfocus group** is very diverse: ranging from experts of the subject to people that are completely oblivious to the service context
- Can be arranged in different ways; from a typical conversation based session to a more creative and stimulating workshop

Why? /Why are we using this?

- To learn the customers perspective. Get their insights, views and opinions
- Can be used in different stages of the project e.g. in gathering customer insight, generating and evaluating ideas and/or concepts

How? /How are we using this?

1. Choose your topic, target group and questions
2. Determine equipment needed
3. Reserve a time and location
4. Select and contact your participants
5. Provide incentives and refreshments
6. Prepare and moderate the session
7. Analyze the results

LEARN \ 2. UNDERSTAND\ *Focus / Unfocus Group*

Questionnaires

What? /What is this tool?

- Collecting a large number of quantitative information from people in a relatively short period of time
- Reveals the explicit and known needs (opposed to tacit and hidden needs)

Why? /Why are we using this?

- Results are often quick to analyze and visualize if closed ended questions are used
- Can reveal information that can be studied further with qualitative methods

How? /How are we using this?

1. Determine the information you want, from whom and what to use it for
2. Take your target group into account in designing the questionnaire (language, time, knowledge, skills...)
3. Choose the right questions and question types (closed, multiple-choice, open)
4. Collect the information in relevant ways (digital or physical)
5. Analyze the results

Expert Interviews

What? /What is this tool?

- Interviewing experts and specialists related to the design context

Why? /Why are we using this?

- Gain deep understanding and insight related to the design context
- Experts can reveal common pitfalls and insights that arise from concrete experience

How? /How are we using this?

- Using a formal structure
  - applying methods in *Interview* and *Contextual Inquiry*
- Using a more informal structure
  - Prepare your conversation with questions around the design context and discuss over a cup of coffee!

Fly on the Wall

What? /What is this tool?

- Form of observation without interfering, intruding or influencing the behavior of the customer(s)
- Performed in a place that's relevant to the design context

Why? /Why are we using this?

- To see how people really behave in activities related to the design context
- To see how services and systems work in action – e.g. roles and structures within a process
- Reveals surprising design opportunities in customers routines

Fly on the Wall

How? */How are we using this?*

1. Planning

- What to observe, how to observe, is permission needed, how much time, how to dress up...
- It's helpful to stop by at the place of observation beforehand (if possible) in order to make a realistic plan

2. Accessing

- If not observing on a public space, introduce yourself and (your agenda) to the person who can give you the permission

3. Observing

- Observe what's typical and what's not, to the relevant task
- Record using relevant tools (e.g. pen and paper, video camera, recorder)

4. Analyzing

- Interpret the results of the observation
- Compare results from different observation sessions

Fly on the Wall

What to observe?

- What are the goals the customers are trying to achieve?
- What are the stages in the observed service/task?
- Are these goals part of a bigger plan?
- What *Touchpoints* (people, processes, environments, objects) are related to the task?

- How different tasks and results are connected between other peoples tasks?
- What problem situations there are and how are they overcome?
- What kind of variation there is in the task. Perhaps influenced by different people and places?
- Check also: Contextual Inquiry*What to observe*

Contextual Inquiry

What? */What is this tool?*

- Observe your customer during the task at hand using the master/apprentice model
  - = *Customer is the master who teaches you by doing the work and talking about it while working*

How? */How are we using this?*

- *Contextual Inquiry steps*
- *What to observe?*

Why? */Why are we using this?*

- Useful in studying the natural use of processes, work and services: Not just what people say but what they actually do!

Contextual Inquiry steps

1. **Conventional Interview (15min)**
   - Introduce yourself and your focus, get permissions to record, ask an overview of the upcoming task
   - Don't ask about issues yet. Observe them later.

2. **Transition (30s)**
   - Explain that customer will do his work while you watch, you will interrupt whenever you see something interesting, and the customer can tell you to wait if it's a bad time to be interrupted.

3. **Contextual interview (hours)**
   - Customer does his work.
   - Observe, interpret, ask questions, be curious, follow, take notes.

4. **Wrap-Up (15min)**
   - Summarize to the customer what you have learned (from your notes).
   - Customer can correct and elaborate on your understanding until you agree on the outcome.

Contextual Inquiry

What to observe?

1. **Space**: the physical place or places
2. **Actor**: the people involved
3. **Activity**: a set of related acts people do
4. **Object**: the physical things that are present
5. **Act**: single actions that people do
6. **Event**: a set of related activities that people carry out
7. **Time**: the sequencing that takes place over time
8. **Goal**: the things people are trying to accomplish
9. **Feeling**: the emotions felt and expressed

+ Inconsistencies: differences on between what people say and do
+ Workarounds created
+ Structure of the task
+ Boredom, frustration, confessions...

Five Whys

What? /What is this tool?

- Analysis method used to dig deep in to the root cause of the problem

Why? /Why are we using this?

- Identify the root cause of the problem via causality
- Solving the root problem helps to solve the problems caused by it

> Why A happened?

> Because of B.

> Why B happened?

> Because of C.

> Why C ...

How? /How are we using this?

1. Write down the problem you seek answer to
2. Ask "Why" this problem happens
3. Write the answer below the problem
4. If the question didn't solve the root cause, repeat steps 2. and 3. until goal met
5. Repeat with different people in order to find consistent results – different people have different reasons and causes for the same problem!

! *More or less then five "Whys" can be needed to achieve the goal – five is a good rule of thumb*

Personal Inventory

What? */What is this tool?*

- Identification of the objects customers find of value in their lives

Why? */Why are we using this?*

- Reveal the activities and values in peoples lives through the objects they own

How? */How are we using this?*

- Ask your customers to document (photographs, video) the objects they use in their personal life (or other context that is relevant to the study)

- Can be used also during an interview e.g. "Could you show me what objects you carry in your pockets?" And asking reasons why they value (i.e. carry around) these objects

Collage

What? */What is this tool?*

- Creative communication around a selected theme using different visual material as a tool
  (often used in a workshop session)

Why? */Why are we using this?*

- The visual material will help to accelerate peoples communication around the selected theme
  (i.e. the design context)
- Reveals explicit and hidden thoughts, needs, ideals and experiences of the participant

How? */How are we using this?*

1. Define the theme that should be dealt with the participants
2. Organize the workshop
3. Have some warm-up/ice-breaker activities prior the actual assignment
4. Present the theme/subject to the participants
5. Provide the participants with visual materials (e.g. magazines, crayons, photographs, glue) and large papers they can fill with this material
6. Participants will present the results in a group conversation
7. Analyze the results

Service Safari

What? */What is this tool?*

- Learning about services by testing them as a customer

Why? */Why are we using this?*

- By experiencing the services we can relate to the customer (empathize)
- Studying different services helps to unveil their pros and cons. This experience driven information can be used in the design process

How? */How are we using this?*

1. Choose services that fit to your design context
2. Decide what to observe
   - *Customer journey*, *Touchpoints*, value for customer...
     e.g. ideas from Contextual Inquiry\What to observe
3. You can also use "Empathy tools" (e.g. earplugs to simulate bad hearing) if that's relevant to the design context
4. Record the experience (notes, pictures, audio, video)
5. Compare and analyze the results

! *Service can be different depending on location, weekday, time of day – so test the service accordingly!*

Draw the Experience

What? /What is this tool?

- Customers draw the experience related to the design context using drawings and diagrams

Why? /Why are we using this?

- Reveal how customers perceive the service – what they visualize as highly important, or what they didn't visualize at all

How? /How are we using this?

1. Decide and write down the theme what you want the participants to draw
   - e.g. "My typical day" "Where my food comes from" "Hospital waiting room"
2. Ask them to visualize the theme using pen and paper
3. Participants present the visualization and you can ask supporting questions
4. Compare visualizations and analyze the results

- Can be done in workshops or on *one-on-one* sessions

Design Probes

What? */What is this tool?*

- Way of gathering data from peoples lives by giving them "probes"
- Probes are a small set of materials that can include e.g. camera, map, diary, forms
- Also known as Cultural probes

Why? */Why are we using this?*

- Gather insights on personal lives, thoughts and feelings
- Probes work as inspirational tools that stimulate imagination and help people to express themselves

How? */How are we using this?*

1. Create a probe that fits your research needs e.g.:
   - **Camera**
     » Documenting predefined things from the user perspective
   - **Diary**
     » Insight on habits, routines, moods and thoughts
     » Can be a book or a card – empty or pre-filled
     » Highs, lows and hopes
2. Choose your participants and execute the research
   - Study ~6 persons for ~1 week
3. Analyze the results
4. One-on-One conversation with the participant

LEARN \ 2. UNDERSTAND\ *Design Probes*

3. **TRANSCRIBE**

What? /What happens in this step?

- *Digitizing* the information to a more practical form (for post-processing)
- *Organizing* the information: e.g. in observations, challenges, needs and quotes
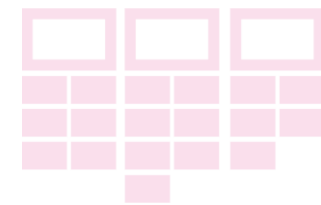
Why? /Why are we doing this?

- Visualizing the results in different ways creates tangible material that will be used in later steps and phases

How? /How are we doing this?

- *Digitizing*
- *Flow Model*
- *Empathy Map*
- *Customer Journey*

Digitize   *Organize*

Digitizing

What? */What is this tool?*

- Digitizing the information gathered in the *Understand* step

Why? */Why are we using this?*

- Digital form is often more practical to post-process
- Preserve and share the gathered information in digital form with your project team and to stakeholders

How? */How are we using this?*

- Plan and execute the digitizing according to your available resources
  - Photograph or scan posters and drawings
  - Manually written information to digital form
  - Transcribe audio recordings to text

Flow Model

What? /What is this tool?

- Visualizing the interaction between customer and other forces related in the observed design context

Why? /Why are we using this?

- Understand the interactions in the design context
- Helps in finding points of improvement and reveals insights
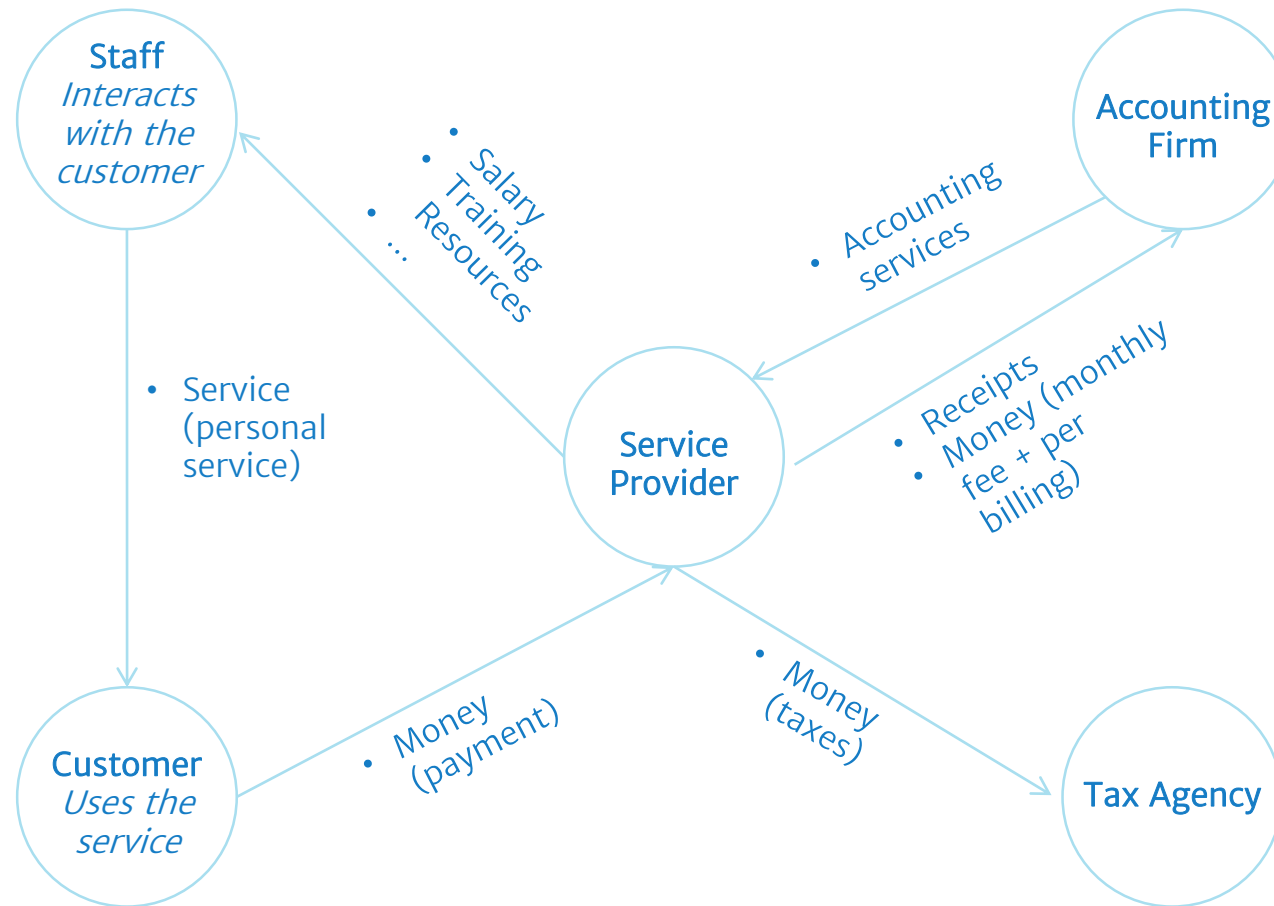
How? /How are we using this?

- Create a flow model utilizing these components:
  - Individuals
  - Responsibilities
  - Groups
  - Flow
  - Artifacts
  - Communications topic / action
  - Places
  - Breakdowns

! You can use sticky notes as a tool when designing the flow chart and iterate as you create

Example

Empathy Map

What? /What is this tool?

- "Big picture" of customer insight built using the gathered customer related observations
- Developed by XPLANE

Why? /Why are we using this?

- Summarize the scattered information of the customer in to a one picture
- Great way of finding insights related to the customer emotions in the design context
- Creates information that can be used in creating *Customer Profiles*

Empathy Map

How? */How are we using this?*

- Categorize and visualize your findings on a large plank paper as follows:

  ! Try the Affinity Diagram as tool

What does the customer

- See?
  - Surroundings, friends, visual influences by market...
- Hear?
  - Friends and relatives, co-workers and boss, media...
- Think and feel?
  - What are the customers worries and dreams, what is important...
- Say and do?
  - Attitudes, opinions, conflicts between say & do

What are customers

- Pains?
  - Biggest frustrations, obstacles, feared risks...
- Gains?
  - Goals in life, how is success measured...

THINK AND FEEL?

SEE?   HEAR?

SAY AND DO?

PAINS?   GAINS?
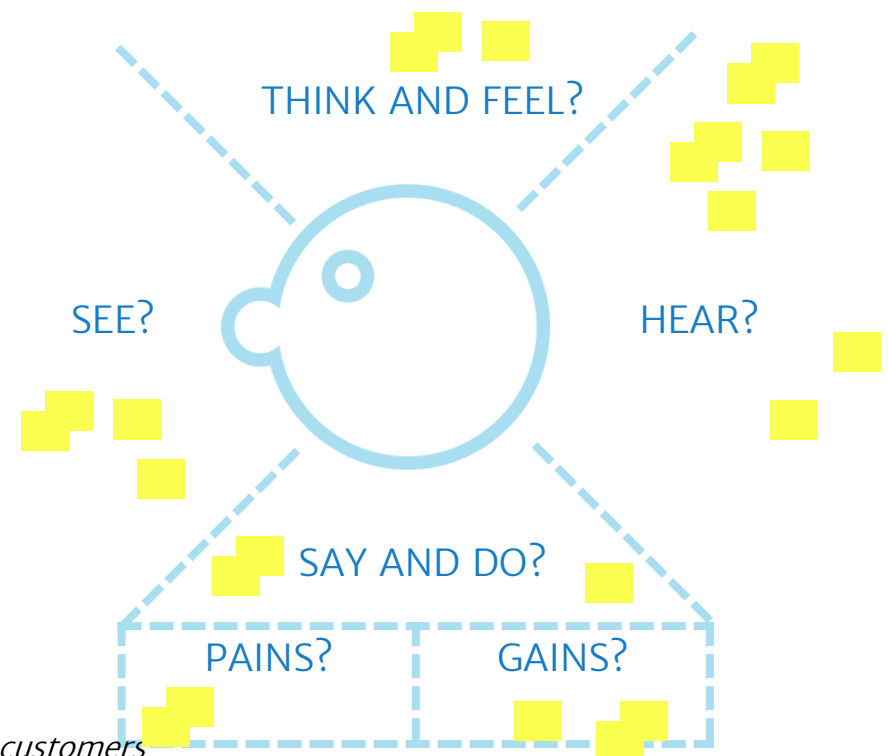
! Create as many Empathy Maps as you need to represent your different customers

4. **ANALYZE**

What? */What happens in this step?*

- *Studying* the transcribed information and *revealing* the Customer Insights
- *Discovering* and *categorizing* the Jobs-to-be-Done
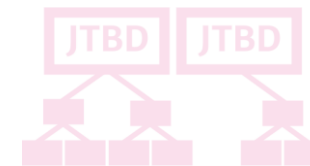- *Summarizing* the Customer Profiles

Why? */Why are we doing this?*

- By going through the transcribed material, the real customer needs and motivations can be discovered
- These analyzed findings will create the basis for the Ideation step

How? */How are we doing this?*

- Affinity Diagram
- Customer Insights
- Jobs-To-Be-Done
- Job Stories
- Customer Profile

Study & Reveal

Discover & Categorize

Summarize

Affinity Diagram

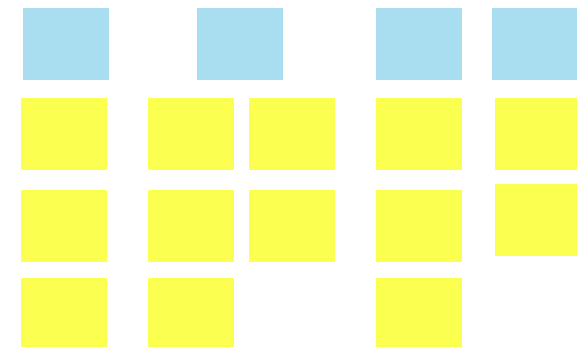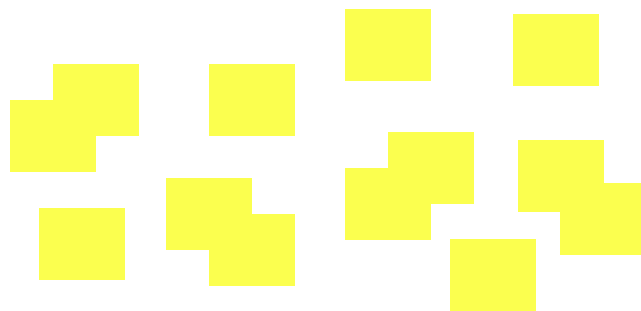## What? */What is this tool?*

- Process of categorizing (and prioritizing) data
  - e.g. ideas, concepts, findings, needs, problems, insights...

Why? */Why are we using this?*

- Efficient way to find patterns, differences, and relationships
- Finding the underlying themes and bigger insights instead of individual needs

How? */How are we using this?*

1. Gather all findings
   - 1 finding per 1 sticky note (text and/or drawings)
2. Sort the findings in to groups
   - By patterns, similarities, themes...
3. See if some larger groups be divided, or smaller ones combined
4. Create titles for each group that describes the contents
5. Prioritize the groups (if necessary)

Customer Insights

What? /What is this tool?

- Studying the transcribed and analyzed data (needs, pains, gains, observations…) to reveal Customer Insights
- Customer Insights are summarized revelations of customer behavior, needs, desires, beliefs and experiences in the design context
- New, unexpected and potentially revolutionary information about the customers in the design context

Why? /Why are we using this?

- Revealing customer insights will help to satisfy the latent needs of the customer and create innovative solutions
- Can lead to *Jobs-To-Be-Done*

How? /How are we using this?

1. Using *Affinity Diagram*, study the results of *Transcribed* and *Analyzed* data and keep your eye on:
   - Contradictions
   - Strange behaviors
   - Inconsistencies

   Be a detective! Find clues and ask yourself "*Why?*" when you find strange behavior
2. Choose five most interesting and potential notes as "key insights"
3. Find related notes for each of the five key insights
4. Summarize the key insight groups as Customer Insight -statements
   - "Customers do X not because of Y, but Z!"
   - "Customers use X in order to get Y faster"
   - "X is the essence of the service"

LEARN \ 4. ANALYZE\ *Customer Insights*

Jobs-To-Be-Done

What? /What is this tool?

- Jobs-To-Be-Done (JTBD) is the higher purpose and goal of customer behavior in the design context. Not the way to achieve the purpose but the end result
- Theory of JTBD needs to be learned in order to create meaningful *Job Stories*
- Customers have need for jobs and "hire" product or service (solutions) to get the job done

  e.g.
  - **Jobs-to-be-done:**
    To have a clean house
  - **Customer can hire these solutions:**
    Vacuum cleaner, mop, maid, cleaning service, self-cleaning materials… (Competitors for the Job)

Why? /Why are we using this?

- Products and services change, but jobs remain
  - Think of the different ways people have solved the Job "satisfy your hunger" through ages!
- JTBD defines the real underlying needs of the customer and enables generating new innovative ways of addressing the job

LEARN \ 4. ANALYZE\ *Jobs-To-Be-Done*

Jobs-To-Be-Done

JTBD - Aspects

- Jobs have *Functional* and *Emotional* aspects
- Emotional aspects are divided to *Personal* and *Social*

- Customers weigh off the hirable products and services (solutions) according these "Performance criteria"
- Great solutions take into account all aspects of the Job

JTBD: "To have a clean house"

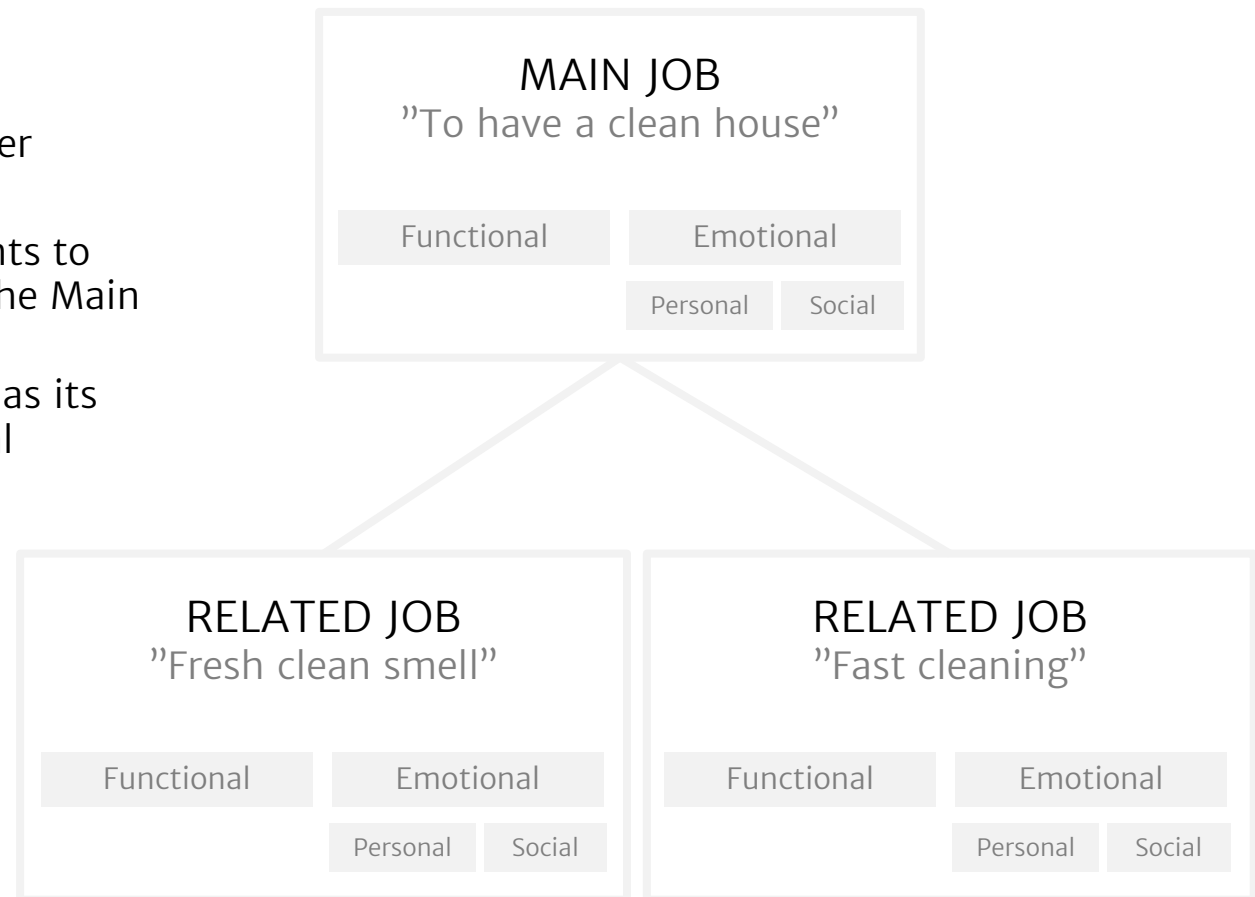| FUNCTIONAL JOBS objective	EMOTIONAL JOBS subjective	
	Personal Jobs "how I feel"	Social Jobs "how I believe I'm perceived when using the solution"
• Get rid of dust from the floor • And from the shelves • Fingermarks off windows …	• Feel in control of my environment • No allergies	• Family enjoys our clean house • I can invite friends for cocktail

Jobs-To-Be-Done

JTBD – Hierarchy

- Jobs can be prioritized as
  - *Main Jobs*
    - » The goal of the customer
  - *Related Jobs*
    - » What the customer wants to achieve in addition to the Main Job
  - Every Main and Related Job has its own functional and emotional aspects

! *Use Affinity Diagram as a tool when prioritizing*

MAIN JOB
"To have a clean house"

Functional   Emotional

Personal   Social

RELATED JOB
"Fresh clean smell"

Functional   Emotional

Personal   Social

RELATED JOB
"Fast cleaning"

Functional   Emotional

Personal   Social

Jobs-To-Be-Done

How? /How are we using this?

- Find Jobs-To-Be-Done
  - Using gathered *Customer Insights*
  - That cover all *JTBD Aspects*
    » Functional and Emotional (Personal & Social)
- Prioritize Jobs according to *JTBD Hierarchy*
- Create *Job Stories*
  - That define and describe the JTBD
  - Using the given structure
    » Context, Motivation, Outcome

- Define criteria for evaluating the solutions (i.e. different products and services that do the Job)
  - Maximize motivation (Gain)
  - Minimize anxiety (Pain)
  - Cover all aspects (functional, personal, social)
  - Take constraints in to account (time, budget, skills, access)
- *Benchmark* current solutions (competitors) for the Job

Job Stories

What? */What is this tool?*

- Creation of statements that define the high-level *JTBDs* from the customer perspective

Why? */Why are we using this?*

- Helps in *Ideation* step, when ideating solutions for specific Jobs, and also when designing specific features to the solution (implementation)
- Can be used as a part of *Customer Profiles*

How? */How are we using this?*

- Choose the most insightful, underserved and relevant JTBDs
  - These will lead in to unforeseen value creating solutions!
- Create sentences using the structure:
  - "When…"   = Situation
  - "I want to"   = Motivation
  - "…so I can"   = Expected Outcome
- Refine and add context to all elements of the structure
- Create as many as are needed to fulfill the customers need for Jobs

Situation	Motivation	Expected Outcome
When _____,	I want to _____,	so I can _____.
"When I'm making a spring cleaning and in a hurry,	*I want to clean my house fast but thoroughly,*	*So I can enjoy the rest of my vacation in peace"*

Refining Job Stories

- Situation is the background for the JTBD; When and where did it happen? What was the larger goal?

- Adding more context to the Situation refines it and makes easier to ideate solutions!

	Job Story	Solution
GENERAL	1. When I'm hungry…	1. Restaurant
	2. When I'm hungry and in a rush…	2. Fast-food restaurant
REFINED	3. When I'm hungry, in a rush and moving by car…	3. Drive-through restaurant

Customer Profile

What? */What is this tool?*

- Archetypes based on true findings (from *Understand* step) of customers motivation, behavior, context and anxieties
- Improved and evolved versions of *Proto Personas*

Why? */Why are we using this?*

- Stimulate and validate generated ideas and concepts
- Helps to focus on the customer perspective in *Ideation* and *Evaluation*

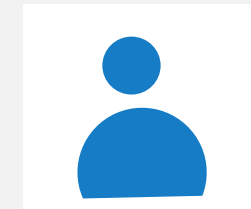## **How?** */How are we using this?*

Using these guidelines:

- Focus on goals, needs, pains and gains – not on demographics!
  - Design solutions based on needs, not on demographics
- Prioritize or score according to the relevance for each of the JTBD
  - e.g. specific customer may need 60% of the "fast job", 30% of the "quality job" and 10% of the "social sharing job"
- Describe with a story
  - Using Job Stories as a guide
  - Cohesive stories – leave no assumptions
- Create as many as there are needed (max. 6 so they are easy to remember!)

Customer Profile

Customer Profile – example

- • Demographics: Name, Age, Occupation
  - – Helps to remember the customer and is easier to refer to later on
- • Story
  - – Based on true customer insights and using *Job Stories* as a basis
- • Goals
  - – What is this customer trying to get done? (*JTBDs*)
- • Gains
  - – The benefits (wants, needs) this customer expects, desires or would be surprised by (latent needs)
- • Pains
  - – Negative emotions (fears, anxieties, obstacles, risks, frustrations) this customer experiences in the design context

NAME AGE
Occupation

STORY

GOALS
1.
2.
3.

☺ GAINS   ☹ PAINS

OUTCOMES
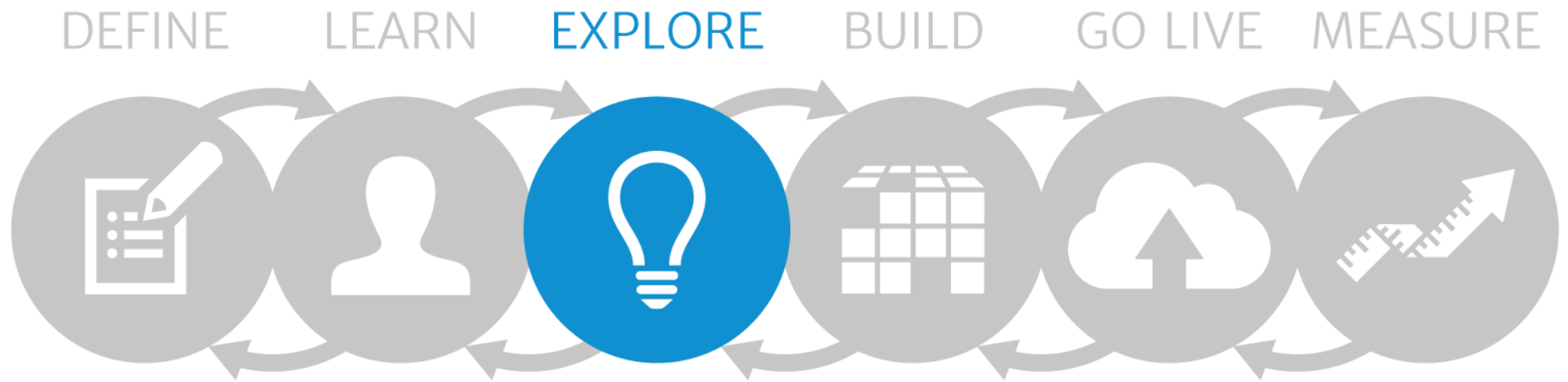
What? /What happens in this step?

- *Outcomes* are the results that should be ready before proceeding to the *Explore*-phase

Why? /Why are we using this?

- Ensuring that there is all the material needed in order to create concepts that rely on concrete customer centered information

How? /How are we doing this?

- *Jobs-To-Be-Done*
- *Customer Profile*
- *Updated Design Brief* (updated based on the results of the *Learn* phase!)

DEFINE   LEARN   **EXPLORE**   BUILD   GO LIVE   MEASURE

FORGE SERVICE LAB
PROCESS

EXPLORE

What? /What happens in this phase?

- Creating *ideas* and *concepts* related to the service context using the results of the *Learn* phase
- *Evaluating* and eliminating the generated ideas and concepts
- *Processing outcomes* that are familiar to the FORGE Software Development Team
- Delivering *Outcomes* for the *Build*-phase

Why? /Why are we doing this?

- To ensure that that there is all the material needed in order to create customer centered services

How? /How are we doing this?

- Using the tools provided to create the *Outcomes* that are needed in order to proceed to the *Build* phase

What? /What happens in this step?

- Using the results of the *Learn* phase in creating design context related ideas in *workshops* and with *FORGE Development*
- Using lateral thinking and aiming for quantity over quality

Why? /Why are we using this?

- This step will create actual testable ideas that will be the basis of the *Service Concept*

How? /How are we using this?

- *Brainstorming*
- *Bodystorming*
- *Powers of Ten*

- *Lotus Blossom*
- *Voting Cards*
- *Visualizations*

Multidisciplinary workshops

» Variety of people creates variety in ideas – more ideas to build open!

FORGE Service Design Development professionals

» Some methods might need professionals for execution (e.g. complex visualizations)

Workshops

FORGE Development

Brainstorming

What? */What is this tool?*

- Generation of ideas in a critique free group situation using a facilitator driven structure

Why? */Why are we using this?*

- Effective way of generating large number of ideas in a short period of time

BRAINSTORMING RULES

- ✓ *Quantity over quality*
- ✓ *Optimistic mindset – no judgment!*
- ✓ *Encourage, listen and support wild ideas*
- ✓ *Build on the ideas of others*
- ✓ *Be visual*
- ✓ *One conversation at a time*

How? */How are we using this?*

There are many types of brainstorming, though some basic rules apply:

1. Facilitator sets up a space and a time
2. Clear objective for the session
   - Write the topic where everyone can see it (e.g. on a white board)
   - Make sure everyone understands it
3. Critique free environment
   - Go through *Brainstorming Rules*
4. Generating ideas
   - Unstructured = anyone can speak up at any given time (no interrupting)
   - Structured = ideas shared in order (passing a turn is allowed if no ideas)
5. All ideas will be recorded (e.g. on sticky notes)
6. Wrap-up
   - Combine similar ideas and decide together what will be the next step

Bodystorming

What? /What is this tool?

- Combination of ideation, acting and prototyping – very physical method of ideation

Why? /Why are we using this?

- Using physical experiences creates empathy to the customer (i.e. helps thinking from the customers perspective)
- Experiencing the situation creates emotions that customer might feel in the design context
- Can also be used as a way of *Prototyping* when testing potential *Service Concepts*

How? /How are we using this?

- Set up the context or experience the ideation revolves around (e.g. hotel reception, gym...) by using available materials (e.g. cardboards, chairs...) and/or going to a relevant area
  - Refer to *Touchpoints* to know what components need to be experienced
- Define roles for group members (customer, staff...) and act out the service scenarios
- Can be documented by taking photos or filming for further analyzing

Powers of Ten

What? */What is this tool?*

- Method of stretching the ideation by varying the magnitude of different components in the design context

Why? */Why are we using this?*

- Helpful stimulator when ideation is hard to start or needs more energy and fuel to go on
- Great tool for facilitators when *Brainstorming*

How? */How are we using this?*

- Increase and decrease different components in your design context e.g.
  - Time
    - » *What if the service could only take 1 minute?*
    - » *What if it should last a whole day?*
  - Size
    - » *What if it had to be bigger than a house?*
    - » *...smaller than a smartphone?*
  - Money
    - » *What if it had to cost 1 million to implement?*
    - » *...under 1 euro...?*

Lotus Blossom

What? */What is this tool?*

- Generating ideas in smaller elements using a tool as a help
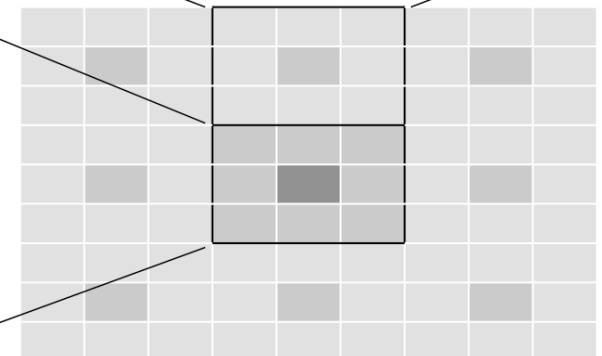
Why? */Why are we using this?*

- Breaking bigger issues down to more manageable elements makes ideation easier

ROUND 2: Solutions

Solution	Solution	Solution
Solution	Element	Solution
Solution	Solution	Solution

ROUND 1: Elements

Element	Element	Element
Element	Theme	Element
Element	Element	Element

Lotus Blossom

How? */How are we using this?*

- Frame the theme of the ideation on a sticky note
  - e.g. JTBD, Job Story, design challenge, customer need...

- **ROUND 1: Elements**
  - Think what are all the elements this chosen theme consists of?
    (e.g. Contexts, people, feelings, touchpoints...)
    - » 10min of individual ideation per participant
    - » One idea per one sticky note
  - Present your ideas to others
  - Choose 8 most important themes

- **ROUND 2: Solutions**
  - Generate solutions for each of the chosen themes
    - » 10min of individual ideation per participant
    - » One idea per one sticky note
  - Present your ideas to others
  - Combine similar ideas together
  - Repeat ideation using old ideas as a basis/inspiration
    - » Don't stop at 8 solutions per element – aim for 100 solutions!
      (also if you run out of ideas you can just move on)

EXPLORE\ 1. IDEATE\ *Lotus Blossom*

Voting Cards

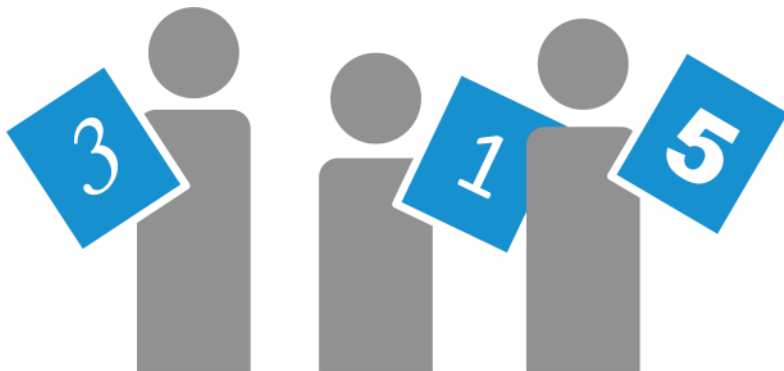## **What?** */What is this tool?*

- Way of consensus-based voting

Why? */Why are we using this?*

- Express everyone's opinion in an efficient way, without the influence of others

How? */How are we using this?*

1. Every participant is given cards marked from 1-5
2. Facilitator asks participants to vote on a subject
3. Everyone lifts their cards simultaneously
4. Votes are then discussed until consensus is reached
   - Discussions will take longer when high difference between voting results
5. Steps 2-4 are repeated until no more voting is required
- You can use Voting Cards in different steps and with different tools
  e.g.
  - Prioritizing
  - Evaluating
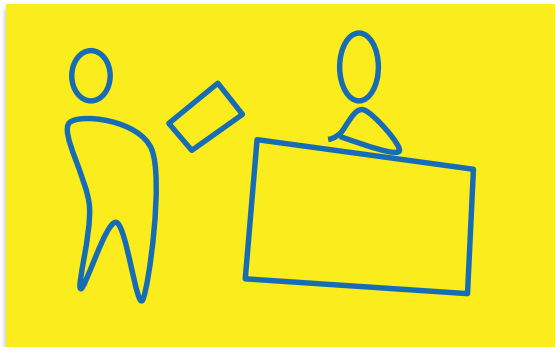 - Ranking *Proto Personas'* spectrums

Visualizations

What? */What is this tool?*

- Transforming ideas, thoughts and verbal information in to visual form

Why? */Why are we using this?*

- Images are a great way of condensing information
- Words can be limiting – "*a picture is a worth a thousand words*"

Thumbnail sketch

How? */How are we using this?*

- Use small simple drawings ("*thumbnail sketches*") in fast-paced creative sessions to explain/support your message
- Visualize the intangible (process', ideas, concepts...) when talking to customers or stakeholders
- Visualizations can explain complex structures and systems in a relatively simple way
- Professionals can create highly realistic visualizations of systems, objects and spaces which are efficient in bringing concepts in to reality

2. EVALUATE

## What? /What happens in this step?

- Evaluation (and elimination) of the generated *ideas* in different ways (e.g. testing with customers and expert evaluation)
- Same tools will be used to evaluate the *Service Concepts* (after step 3.: *Concept*)

Why? /Why are we doing this?

- To ensure that the most potential ideas will be used in the creation of the *Service Concept* – and that the most potential *Service Concept* will be delivered to the *Build* phase

How? /How are we doing this?

- *Prototyping*
- *Feedback Capture Grid*
- *Concept Selection Matrix*
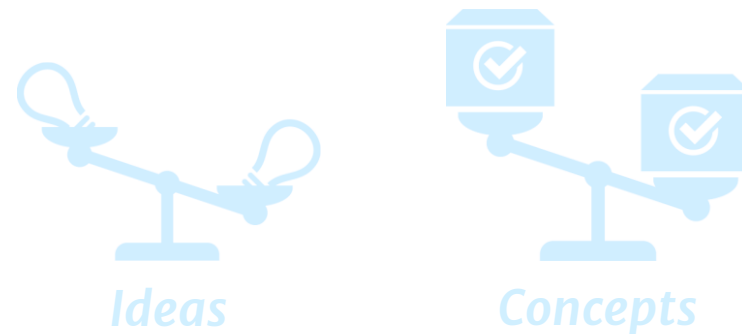
Ideas   Concepts

Prototyping

## What? /What is this tool?

- Making tangible representations of ideas and/or concepts

Why? /Why are we using this?

- Enables testing solutions with your customers
- It's easier to understand and give feedback to prototypes than written descriptions, or abstract ideas
- Usually a customer criticizes a rough prototype more openly than a more polished one – and you get more valuable information!
- On rough prototype customers won't focus on the small insignificant details, but the prototype as a whole
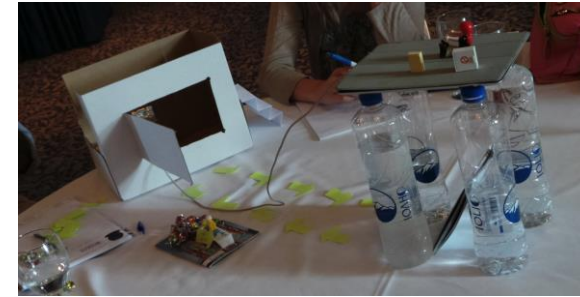
Rapid prototyping ©Juha Tuulaniemi
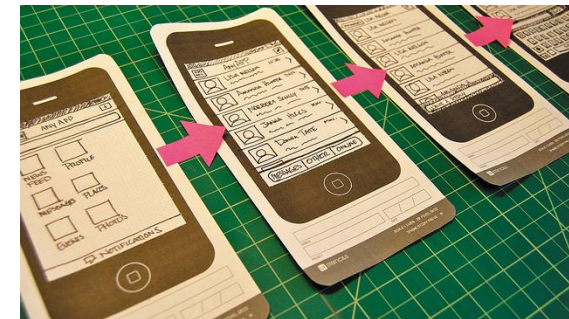
Paper prototype ©Rosenfeld Media
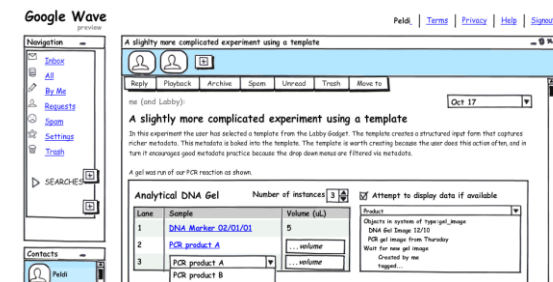
Wireframe ©Cameron Neylon

Prototyping

Planning the prototyping

- Reasons for prototyping
  - What do you want to learn? To whom the prototype is targeted?
- Scope of the prototype
  - Do you want to test the solution as a whole or a specific area of it?
- Testing and methods
  - Where does the testing take place? What testing methods to use?
- Schedule
  - Depending on the size of prototyping it requires time and money to create (including the actual testing and analyzing the results). Make sure to get the right amount of profit from the investment.

! *In **Rapid Prototyping**, don't plan – just use anything that is available at the moment*

How? */How are we using this?*

Making it tangible:

- Visualizations
  - Sketches, wireframes, storyboards…
- Constructed models
  - Paper, cardboard, foam, tape, everyday objects…
- Digital
  - e.g. use full screen PowerPoint with hyperlinks for prototyping interactive software

EXPLORE\ 2. EVALUATE\ *Prototyping*

Prototyping

Stages of prototyping

Visuality (vertical axis) / **Functionality** (horizontal axis)

- "Production ready" prototype
- Interactive digital prototype
- Paper wireframes
- Paper prototypes
- Interactive wireframes
- GUI mockups
- Rapid prototyping
- Sketches
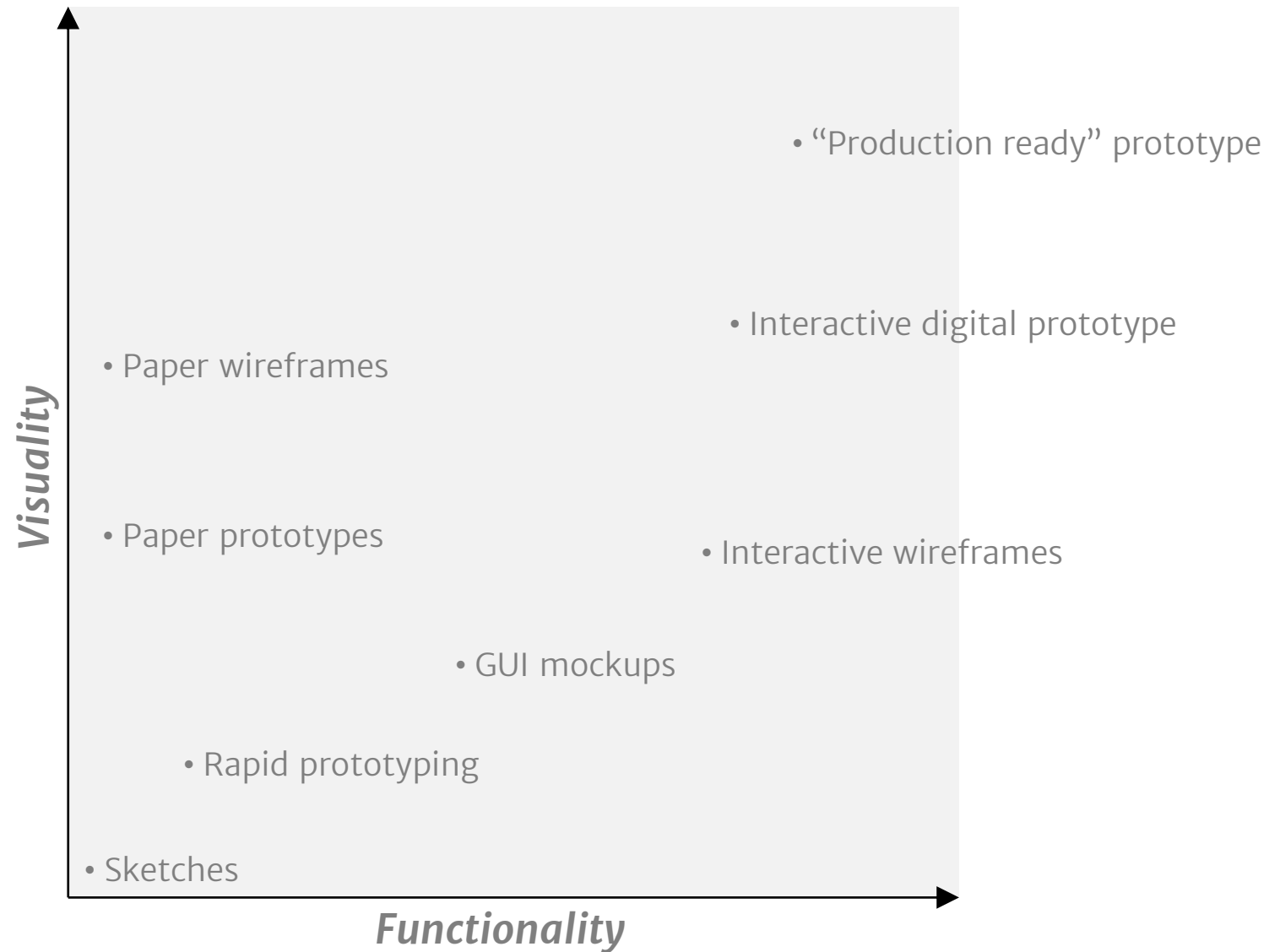
Feedback Capture Grid

What? /What is this tool?

- Analysis of feedback, questions and ideas that have arised from testing of prototypes
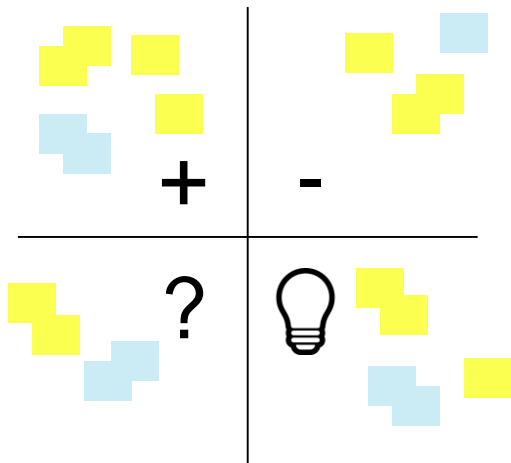
Why? /Why are we using this?

- Systematical way of going through feedback and helps to decide how to carry on with the project

How? /How are we using this?

1. Divide a large plank paper into four quadrants
2. Label these quadrants:
   - **+** What was liked
   - **-** Criticism
   - **?** Questions that came up
   - 💡 Ideas that came up
3. Fill
   - While and after the testing of the prototype
   - From the customer perspective and from your teams perspective

   ! Use different colored sticky notes to differentiate the perspectives

Concept Selection Matrix

What? /What is this tool?

- Evaluation of solutions (ideas or concepts) using a spreadsheet and selected metrics

Why? /Why are we using this?

- Analytical way of evaluating between multiple options (ideas or concepts)
- Ensuring that the key findings of the _Learn_ phase are present in the concepts

WEIGHTED CONCEPT SELECTION MATRIX

- _Give a %-value to each of the criteria so that the sum of all criteria equal to 100%_
- _Multiply the evaluated score (1–5) according to the weight_
  - _weight% x evaluated score = Concept score_

How? /How are we using this?

1. Choose the concepts to evaluate
2. Select the evaluation criteria (max. 10)
   - Make use of _Design Brief_ and the criteria defined in _JTBD_
3. Evaluate how each concepts match the criteria
   - + better to respect the criteria
   - – worse to respect the criteria
   - 0 equal to respect the criteria

   - _! You can use Voting Cards as a tool!_

4. Calculate total scores – highest one matches the criteria best

Concept Selection Matrix

Regular

CRITERIA	CONCEPT A	CONCEPT B	CONCEPT C
CRITERIA 1	1	−1	1
CRITERIA 2	0	0	1
CRITERIA 3	0	0	0
CRITERIA 4	−1	0	−1
CRITERIA 5	1	0	0
CRITERIA 6	0	−1	1
TOTAL SCORE	1	−2	**2**

Concept Selection Matrix

Weighted

CRITERIA	WEIGHT	CONCEPT A	CONCEPT B	CONCEPT C
CRITERIA 1	25%	2	4	5
CRITERIA 2	20%	3	4	1
CRITERIA 3	10%	4	3	3
CRITERIA 4	20%	1	5	4
CRITERIA 5	20%	3	2	3
CRITERIA 6	5%	2	3	4
TOTAL SCORE	100%	2,4	3,65	3,35

3. CONCEPT

What? /What happens in this step?

- Evaluated ideas will be *refined* and *combined* in order to create several *Service Concepts*, which are possible solutions to customers needs
- After this step, these *Service Concepts* will be *Evaluated* using the methods from the previous step

Why? /Why are we doing this?

- A well visualized *Service Concept* (generated from the evaluated ideas) will be easier to evaluate and process into viable solutions
- Having multiple concepts helps gather a variety of insights from testing

How? /How are we doing this?

- *Storyboard*
- *Visualizations*
- *GUI Mockups*
- *Customer Journey*
- *Service Blueprint*
- *Service Concept*

Storyboard

What? /What is this tool?

- Visual description of the interaction between the service and the customer(s)

Why? /Why are we using this?

- Easy to read and understand by variety of people, which helps in conveying the idea of the *Service Concept*
- Can be used in variety of scales from few simple sketches to realistic visualizations – depending on the context it is created for
- One way of *prototyping* (making ideas and process' tangible)

Storyboard © Rob Enslin

Storyboard

How? /How are we using this?

1. What are the key points in your idea/concept you want to tell in your storyboard?

2. What's the story and message?
   - Places, actors and emotions in the story

3. What is the structure/timeline?
   - You can utilize your *Customer Journey* and *Service Touchpoints*

4. Sketch your storyboard
   - Images and short descriptions (captions) that complement each other and convey the essence of the idea/concept

5. Create the final storyboard
   - Use photographs, drawings or other *visualizations* effectively

!   Study the language of comics and movies

GUI Mockups

What? /What is this tool?

- Visualization of Graphical User Interface (GUI) in user perspective
  - GUI is the visual elements (windows, icons, menus) of a digital product/service that are used to operate it (e.g. smart phones' GUI is operated by pushing icons with a finger)

Why? /Why are we using this?
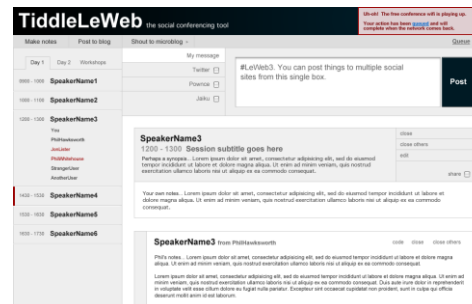
- Great way of *prototyping* digital services

Simple © hobvias sudoneighm

Complex © Phil Hawksworth

How? /How are we using this?

GUI mockup methods range from **simple** to **complex** – depending on the objective:

- **Simple**: *Sketches*
  easy to use, less features and interactivity
  - Pen and paper –sketches
  - Printable templates
  - Powerpoint

- **Complex**: *GUI Mockup software*
  learning required, more features and interactivity
  - Balmsamiq (free trial)
  - POP App (free, limited features)
  - Ninja Mock (free for personal use)
  - Pencil Project (free)

Customer Journey

What? /What is this tool?

- Visualization of the service process from the customers perspective

Why? /Why are we using this?

- Understand the big picture – how the service is constructed
- Demonstrate how individual parts of the service work – and how they could be developed further

How? /How are we using this?

- You can use Customer Journey to visualize
    - the **current service process** customer goes through
      (based on the *Understand* step)

      &
    - a **new service concept** from the customer perspective
      (based on the *Ideate* and/or *Concept* steps)
- Use *Visualizations* – actual photographs or drawings!
- The design context determines what elements the Customer Journey consists of, but some basic key elements are often applied
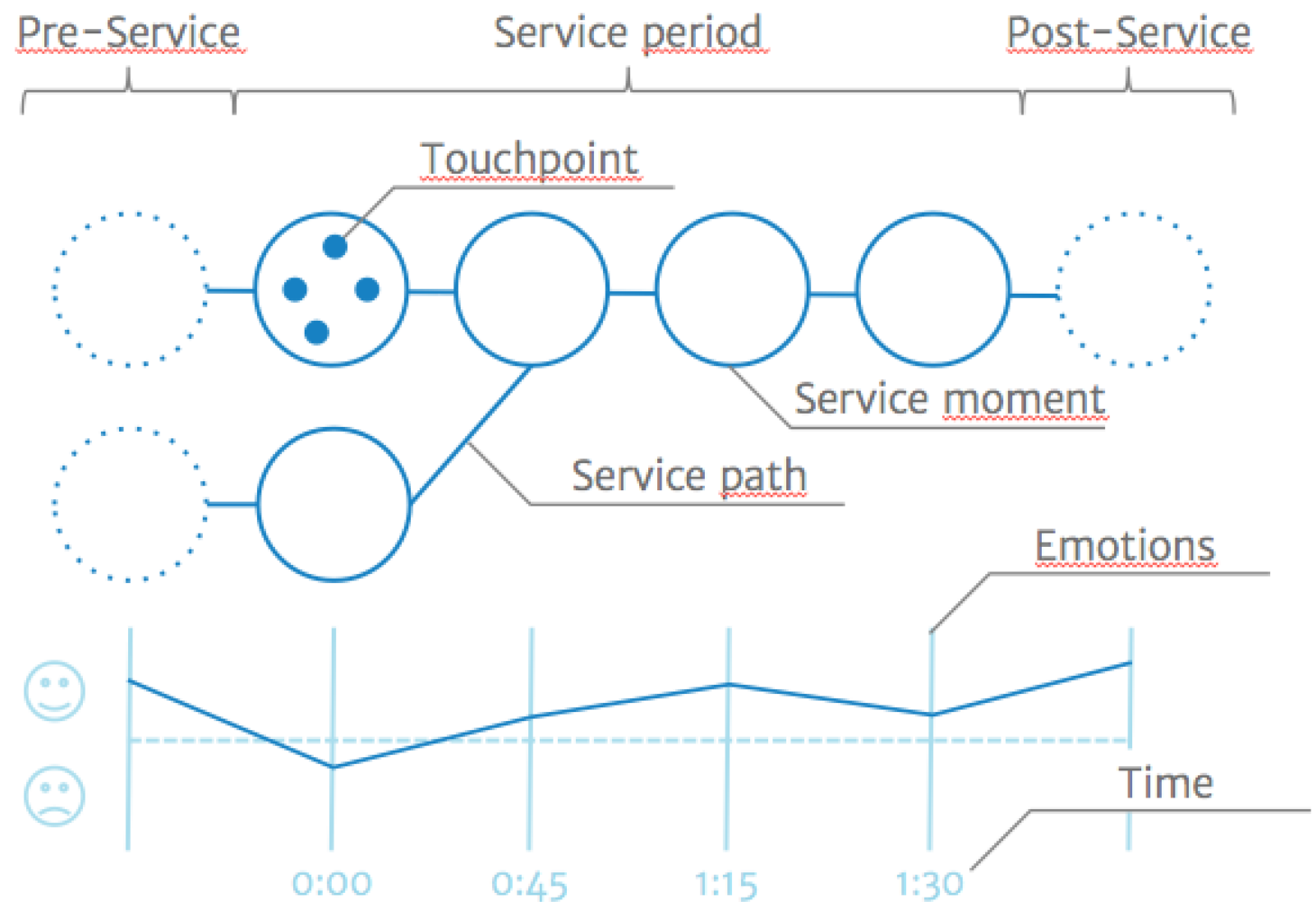
Customer Journey

Key elements 1/2

- *Pre-service period*
  - How the customer perceives the service, and what *expectations* there are, before the actual service period? (Advertising, past experiences, idea…)
- *Service Period*
  - How the customer *experiences* the service? (using a web store, eating at a restaurant, flying to New York…)
- *Post-service period*
  - Is the customer *satisfied*? Were the expectations met? Does the customer get more or less than expected? What actions are taken after the service? (feedback, customer-relationship…)
- *Service moment*
  - Stages/phases that the service consists of (finding the service, reservation, check-in…)

- *Touchpoints*
  - Elements present in the service moments that customer interacts with
    » Environments, Objects, Processes and People (staff, website, tools…)
- *Service path*
  - Order of service moments customer goes through when using the service
    » can vary depending on the customer e.g. different path for every *Customer Profile*
- *Time*
  - Duration of the service moments
- *Emotions*
  - What kind of positive or negative emotions customer has during the journey

Customer Journey

Key elements 2/2

Service Blueprint

What? /What is this tool?

- Process model that shows the components the service consists of and the relationships between them
- In addition to customer perspective (presented in *Customer Journey*) it shows also the "backstage" processes that are needed to maintain the service

Why? /Why are we using this?

- Powerful way to visualize and understand the service in order to maintain and improve it
- Essential when designing the implementation of a service

How? /How are we using this?

1. Visualize the *Customer Actions* (*Customer Journey* can be used as a basis)
2. Visualize the *Employee Actions* – *Frontstage* and *Backstage*
3. Visualize the *Support Processes* and link them to the *Employee Actions*
4. Add the *Physical Evidences*

- You may need several Service Blueprints for different customers
- The design context determines what elements the Service Blueprint consists of, but some basic key elements are often applied
  - You can also apply the Key Elements of Customer Journey!

Service Blueprint

Key elements 1/2

- *Physical Evidence*
  - Tangibles that are needed in delivering the service
    (e.g. desk, room, paper, computer...)
- *Customer Actions*
  - The steps customer performs in using the service
    (i.e. *Service Moments*)
- *Employee Actions*
  - Divides in to two parts:
    - » Steps and processes that are **visible** to the customer
    - » Steps and processes that are **invisible** to the customer
- *Support Processes*
  - The internal services that support in delivering the actual service
    (accounting, logistics, staffs break-room...)

- *Line of interaction*
  - Where the direct interactions between the customer and the service happen
    (using a website, staff greets at the reception...)
- *Line of visibility*
  - Separates the visible and invisible service processes
- *Frontstage*
  - Where the customer comes in contact with the service
- *Backstage*
  - How the service is constructed and maintained inside the organization

Service Blueprint

Key elements 2/2
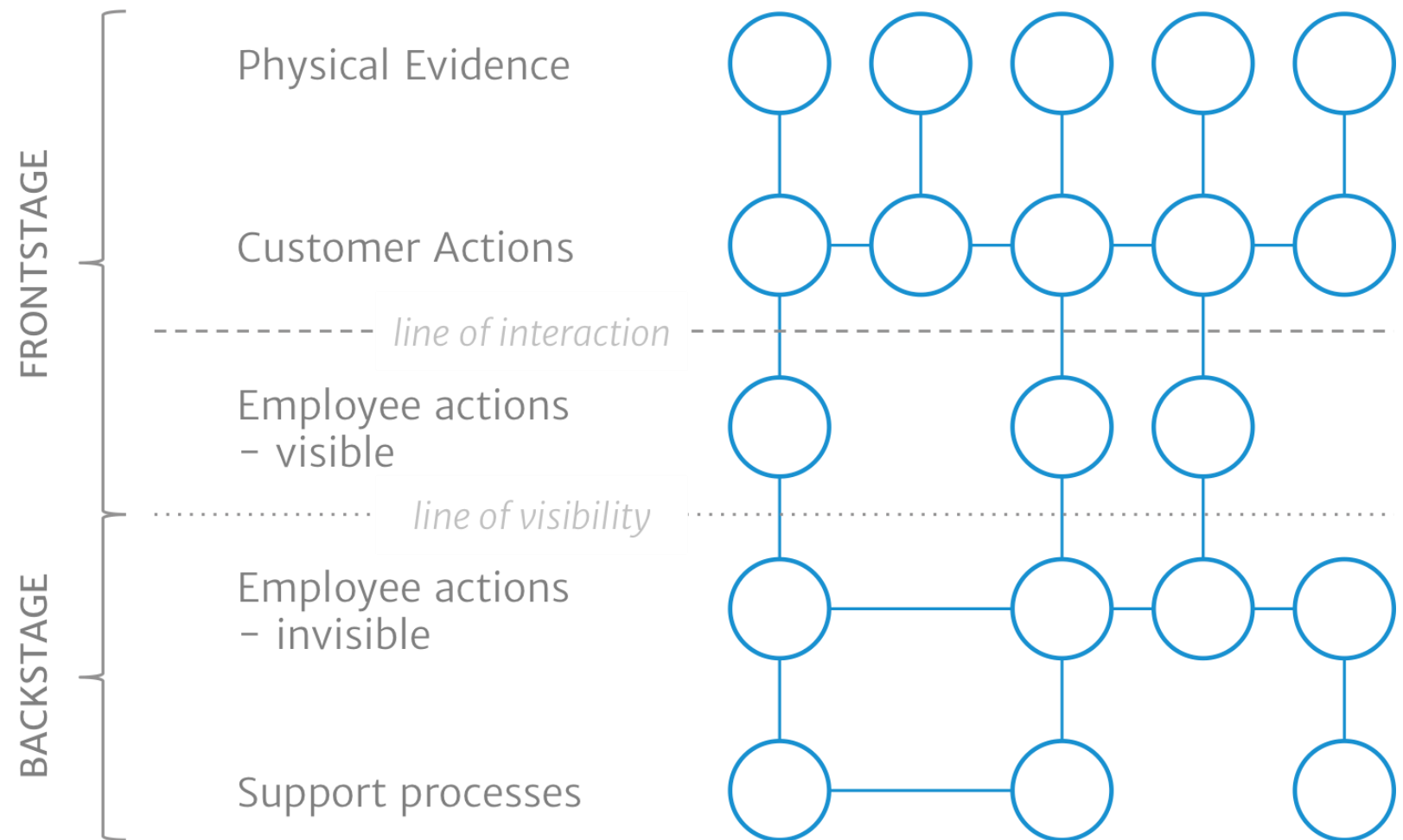
Service Concept

What? /What is this tool?

- Creation of an understandable description of the designed Service Concept
- Service Concept is a possible solution to the needs of the customer in the design context

Why? /Why are we using this?

- Service Concept will be the summary of all the work done in *Learn* and *Explore*
- Can be referred to during following phases in order to confirm that the essence of the concept hasn't been lost in further development
- Excellent communication tool for stakeholders

How? /How are we using this?

- Can be a multipage presentation, one poster, a video… any format that is best suitable for the project at hand
- Can include all, more or some of the below:
    - *Storyboard*
    - *Customer Journey*
    - *Service Blueprint*
    - *GUI mockup*
    - *Visualizations*
    - *Prototypes*

- Has less amount and detailed information before the *evaluation* (e.g Service Concept poster) and more information (e.g. Service Concept presentation) before the *Build* phase

Service Concept

Service Concept – example of contents

You can answer these questions in visual and text form

1. The Need
    – What was the Design Brief?
    – What is the design context?
    – What is the Job-to-be-Done?
    – What problem does the concept solve?
    – What are the current solutions for the problem?

Service Concept poster

2. The Solution
    – What is the service process like?
    – How does it appear to the customer?
    – Who are the customers?
    – Why is it better than others solutions?

Service Concept presentation

4. PROCESS

What? /What happens in this step?

- *Generating* outcomes that are familiar to the FORGE Software Development Team using the final *Service Concept* as a basis

Why? /Why are we doing this?

- This will enable a smooth transition from the service design phases (*Learn* & *Explore*) to agile software development (*Build*, *Go live* & *Measure*)

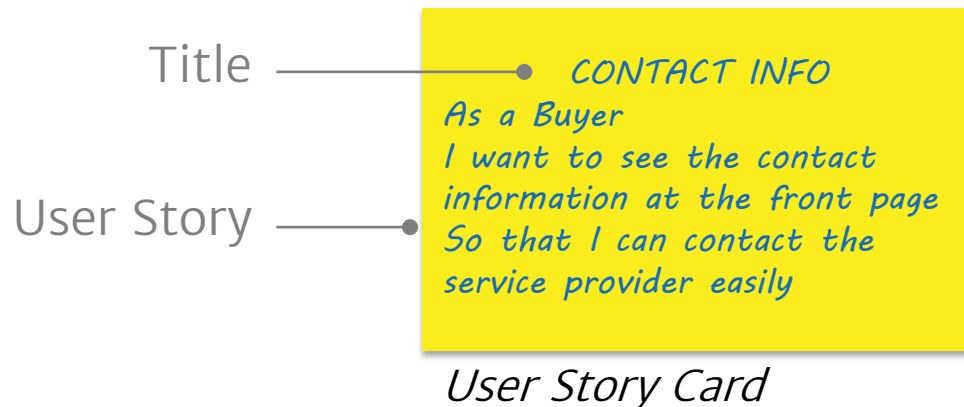## How? /How are we doing this?

- *User Stories*

User Stories

What? */What is this tool?*

- Creation of individual User Stories to the *product backlog* (i.e. part of agile software development methods used from the *Build* phase onwards)

Why? */Why are we using this?*

- User Story is a way of giving the software development team concrete tasks to perform for the implementation of the *Service Concept*

Title ——————

User Story ——————

> CONTACT INFO
> As a Buyer
> I want to see the contact information at the front page
> So that I can contact the service provider easily

User Story Card

How? */How are we using this?*

Create *User Story Cards* using this structure:

- Title
  - Summarizes the content of the card
- User Story
  - "*As a…*
    - » The person using the service (actor)
  - *I want*
    - » What the user needs the service for (narrative)
  - *…So that I*"
    - » Why the user needs it (goal)

! *Decide the format (digital/physical) of User Story Cards with the FORGE Software Development Team*

OUTCOMES

What? */What happens in this step?*

- *Outcomes* are the results that should be ready before proceeding to the *Build*-phase

Why? */Why are we doing this?*

- Ensuring that there is all the material needed in order to create the digital services that rely on the *Service Concept*

How? */How are we doing this?*

- *User Stories*
- *Service Concept*

    Includes e.g.:
    - *Storyboards*
    - *GUI Mockups*
    - ...etc.

LEARN MORE

What? */What happens in this phase?*

- Getting to some of the many sources that were used in the creation of this toolkit
- Sources are in English (and some in Finnish)

Why? */Why are we doing this?*

- Use the sources for finding more in-depth information about specific subjects

How? */How are we doing this?*

- Sources are in the same order as the phases, steps and tools presented in this toolkit
- Click on the links or grab the physical copies
- Use Google and your local library to find out more information!

! *New tools and methods arise everyday – use them to learn more and explore new possibilities!*

LEARN

– *Identify*

- Design Brief
  - [How To Write An Effective Design Brief](#) *cleardesignuk.com*
  - [User research briefs](#) *gov.uk*
  - Muodon palapeli (Ilkka Kettunen 2010)
- Stakeholder Map
  - [Stakeholder mapping – Marketing theories](#) *professionalacademy.com*
  - [Actors Map](#) *servicedesigntools.org*
  - [Service Ecology](#) *servicedesignmaster.com*
- WWWW&H
  - [A Five-Step Process For Conducting User Research](#) *smashingmagazine.com*
  - [Five Ws and H](#) *mycoted.com*
  - Delft Design Guide (2010)
- Proto Personas
  - [Using Proto-Personas for Executive Alignment](#) *uxmag.com*
  - [How to make Proto-Personas and get everyone on the same page](#) *dtelepathy.com*
  - [Remixing The Power of Ad-Hoc Personas](#) *thingsontop.com*
- Benchmarking
  - [Service Design – Practical access to an evolving field](#) (Stefan Moritz 2005)
  - Palvelumuotoilu (Juha Tuulaniemi 2011)

– *Understand*

- Interview
  - [The Bootcamp Bootleg](#) *dschool.stanford.edu 2010*
  - [Innosight. Customer Solutions Using Jobs To Be Done](#) *youtube.com*
  - Käyttäjä tuotekehityksessä: Tieto, tutkimus, menetelmät (Sampsa Hyysalo 2009)
- Focus / Unfocus Group
  - [Guidelines for Conducting a Focus Group](#) *assessment.aas.duke.edu*
  - [Method Cards for IDEO](#) *ideo.com 2002*
  - Käyttäjä tuotekehityksessä: Tieto, tutkimus, menetelmät (Sampsa Hyysalo 2009)
- Questionnaires
  - Käyttäjä tuotekehityksessä: Tieto, tutkimus, menetelmät (Sampsa Hyysalo 2009)
  - [Method Cards for IDEO](#) *ideo.com 2002*
- Expert Interviews
  - Käyttäjä tuotekehityksessä: Tieto, tutkimus, menetelmät (Sampsa Hyysalo 2009)
- Fly on the Wall
  - [Method Cards for IDEO](#) *ideo.com 2002*
- Contextual Inquiry
  - Contextual Design: Defining Customer-Centered Systems. (Beyer, H. & Holtzblatt, K. 1998)
  - Participant Observation. New York: Holt, Rinehart & Winston (Spradley, James P. 1980)

- Five Whys
  - [Why Why Why](#) *mycoted.com*
  - [Method Cards for IDEO](#) *ideo.com 2002*
- Personal Inventory
  - [Method Cards for IDEO](#) *ideo.com 2002*
- Collage
  - Delft Design Guide (2010)
  - [Method Cards for IDEO](#) *ideo.com 2002*
- Service Safari
  - [Service Safari](#) *liveworkstudio.com*
- Draw the Experience
  - [Method Cards for IDEO](#) *ideo.com 2002*
- Design Probes
  - [Design Probes](#) (Tuuli Mattelmäki 2006)
  - [Method Cards for IDEO](#) *ideo.com 2002*

- *Transcribe*
  - Digitizing
  - Flow Model
    - Contextual Design: Defining Customer-Centered Systems. (Beyer, H. & Holtzblatt, K. 1998)
  - Empathy Map
    - [The Bootcamp Bootleg](#) *dschool.stanford.edu 2010*
    - Business Model Generation (Osterwalder A. & Pigneur Y. 2010)

- *Analyze*
  - Affinity Diagram
    - [Affinity Diagram](#) *servicedesigntools.org*
    - [Method Cards for IDEO](#) *ideo.com 2002*
    - [Human-Centered Design Toolkit](#) *ideo.com 2009*
  - Customer Insights
    - [Human-Centered Design Toolkit](#) *ideo.com 2009*
    - Business Model Generation (Osterwalder A. & Pigneur Y. 2010)
  - Jobs-To-Be-Done
    - [The Job-To-Be-Done Theory for Designers](#) *pebbleroad.com*
    - [What Customers Want from Your Products](#) *hbswk.hbs.edu*
    - [Innovators toolkit – Jobs to be done](#) *innovatorstoolkit.com*
    - [Jobs-to-be-done, a goal-driven solution framework](#) *slideshare.net*
    - [Designing Features Using Job Stories](#) *medium.com*
    - [5 Tips For Writing A Job Story](#) *alanklement.blogspot.fi*
    - Innovator's Solution: Creating and Sustaining Successful Growth (Clayton M. Christensen & Michael E. Raynor 2003)
  - Customer Profile
    - [A New Framework for Customer Segmentation](#) *hbr.org*
    - [Personas and Jobs To Be Done](#) *medium.com*
    - [Job stories are great, but personas aren't dead](#) *elezea.com*
    - [Getting from research to personas: harnessing the power of data](#) *cooper.com*
    - [Replacing Personas With Characters](#) *medium.com*

EXPLORE

– *Ideate*

- Brainstorming
  - [Brainstroming](#) *mycoted.com*
- Bodystorming
  - [Method Cards for IDEO](#) *ideo.com 2002*
  - [The Bootcamp Bootleg](#) *dschool.stanford.edu 2010*
- Powers of Ten
  - [The Bootcamp Bootleg](#) *dschool.stanford.edu 2010*
- Lotus Blossom
  - [Lotus Blossom](#) *creatingminds.org*
- Voting Cards
  - [Planning Poker](#) *wikipedia,org*
- Visualizations
  - "Design Drawing", Delft Design Guide (2010)

– *Evaluate*

- Prototyping
  - [Integrating Prototyping Into Your Design Process](#) *boxesandarrows.com*
  - [Integrating Prototyping Into Your Projects](#) *michaelgaigg.com*
  - [Concerning Fidelity in Design](#) *uxbooth.com*
  - [The Bootcamp Bootleg](#) *dschool.stanford.edu 2010*
  - [Method Cards for IDEO](#) *ideo.com 2002*
  - Paper Prototyping: The Fast and Easy Way to Design and Refine User Interfaces (Carolyn Snyder 2003)
  - Delft Design Guide (2010)
  - Käyttäjä tuotekehityksessä: Tieto, tutkimus, menetelmät (Sampsa Hyysalo 2009)

- Feedback Capture Grid
  - [The Bootcamp Bootleg](#) *dschool.stanford.edu 2010*
- Concept Selection Matrix
  - [How To Use The Pugh Matrix](#) *decision-making-confidence.com*
  - Delft Design Guide (2010)

– *Concept*

- Storyboard
  - "Scenarios", [Method Cards for IDEO](#) *ideo.com 2002*
  - Delft Design Guide (2010)
- GUI Mockups
  - Paper Prototyping: The Fast and Easy Way to Design and Refine User Interfaces (Carolyn Snyder 2003)
- Customer Journey
  - "Journey Map", [The Bootcamp Bootleg](#) *dschool.stanford.edu 2010*
  - Palvelumuotoilu (Juha Tuulaniemi 2011)
- Service Blueprint
  - Palvelumuotoilu (Juha Tuulaniemi 2011)
- Service Concept
  - Palvelumuotoilu (Juha Tuulaniemi 2011)

– *Process*

- User Stories
  - [Writing User Stories](#) *gov.uk*

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