pdr.

HMRC
Service design in a policy environment; a guidebook.


SMART Appraisal Process –
Draft V0.1
Application
Submission
Request outstanding
materials from client
Request External Financial
Appraisal
External
Financial Appraisal
Required?
External Financial
Appraisal
External Financial
Appraisal Report

Service design in a policy environment; a guidebook.

PDR, the International Centre for Design and Research, has been working with HMRC to build a unique programme that will focus on building expertise in service design within a policy environment.

The training will be structured around three workshops that will focus on different aspects of service design and how it relates to policy design. The intended outcomes are new knowledge, experience and skills, and how these apply to your own service's development.

This guidebook supports the training sessions, providing copies, examples and instructions for use of all of the tools covered.

Through a mixture of presentations, case studies and workshop activities the course will:

- Build on your existing knowledge of user-centred design,
- Develop service design skills,
- Provide you with insight on how service design and public policy can influence each other,
- Align your team around the service design process.

About this handbook

In this handbook we have collected the most effective tools that we use with clients at PDR to help you undertake projects using this approach.

We hope that PDR course inspires you to share the tools and methods learnt with colleagues and that you gain the confidence to start using these on projects that you are managing now and in the future.

Download the tools here:
https://tinyurl.com/zxaclrn

If you have any questions after the sessions please email:
awhicher@pdronline.co.uk

A set of tools for undertaking user centred design for policy & service development.

The process

This course and guidebook will provide you with the tools, methods and process required to use this approach in an effective and impactful way on projects.

It has been created by PDR, an international design and research centre that specialises in user-centred design for public policy and service innovation.

The tools and methods presented here can either be used in order, across a full design project or used individually to support specific activities.

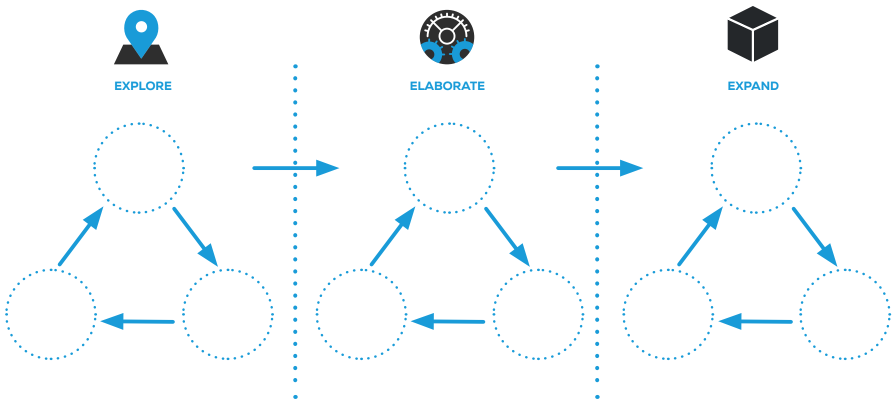
Design is an iterative process, however it has some distinctive phases, these are;

1.Explore – when you frame the problem, examine the state of play, gather data, observe users, understand their experience and analyse their needs.

2. Elaborate – when you develop new concepts, co-design new solutions, develop prototypes and test them with users to reduce risk of failure.

3. Expand – when you refine your concepts, prepare implementation, evaluate the outcomes and impact, use this evidence for further iteration.

Service design in a policy environment



RELATED TOOLS/METHODS – WITHIN THIS GUIDEBOOK

Problem Definition Policy Map Stakeholder Map User Research Framework User Stories Personas	Customer Journey Map Ideation Prototype Testing Storyboard	Service Blueprint Service Roadmap Evaluation Framework

Before you start...

There are a couple of things to remember before you start.

1: Get into a UCD mindset

Observe people, pretend you don't know the answers and focus on what they do rather than what they say they do or think they do.

2: Be collaborative

The ideal team size is 5-8 people; make sure your core team has commitment, right skills and authority to get things done. As a project lead, remember to be open and encourage different points of view.

3: Be visual

Remember to keep a visual record of your work. You will generate a lot of information, photos, sketches and prototypes. Find somewhere to stick everything up and use this to monitor the progress and inform future practice; take pictures or film the process.

4: Stock up the supplies

Marker pens, paper, tape, sticky notes, voting dots and blue tack; once you get to know the tools better you might want to use other props such as; maps, Lego, 3D models etc.

5: Think big

Encourage visual thinking from your team and project participants. Find a printer that can print tools and worksheets on A1/A2 sheets.

6: Start small

Transformation starts small, it takes a shift in culture and builds momentum through action. Remember, in services and policy it starts and ends with people.

Problem Definition

This activity is important for ensuring that the core project team and senior management have agreement and buy-in for the problem you are trying to address.

Once completed we recommend writing up the problem into a one-page description and getting written sign-in from all of the project team and key decision makers to this.

Practicalities

Time
1-3 hours

Materials
Problem definition worksheet, marker pens and post-it notes and a camera.

Facilitation
A senior member of your project team should facilitate this session, ensuring that the key points are captured and documented.

How do I define the problem?

Now that you are ready to start your project; the first task is to define the exact problem that you are tackling.

This activity is important for ensuring that the core project team and senior management have agreement and buy-in for the problem you are trying to address.

Start by thinking about:

- Why are we doing this work?
- Who are our users?
- What outcome might users get from this policy/service?
- What outcome are we looking for?
- What are our key metrics? (see Evaluation framework tool)

Put your objective and the problem you are trying to solve on the wall. It will remind you about what you are trying to achieve and how you are moving towards it.

Confront your goal with the insights you are getting through the process of discovering users need. New perspectives and knowledge about the challenge can make you re-frame your problem and change your objective.

Design tool

Problem Definition

1 In your team discuss why you are doing this work and agree on a statement that reflects this problem.

2 Now think about the user groups, clients and stakeholders that are directly affected by this problem, draw and describe them here.

3 Without thinking of detailed solutions identify some potential impacts that an intervention might have for users.

4 Now think about the impact on your organisation or department.

5 Agree on a set of metrics for this problem. Think about data you currently capture or could do so easily.

Problem Definition

How to use this tool
A senior member of your project team should facilitate this session, ensuring that the key points are captured and documented.

When to use this tool
Use this tool at the start of your project.

Why are we doing this work?

Who are our user groups, clients and stakeholders?

What outcome might users get from this?

What outcome might our organisation get from this?

What are our key metrics?

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Policy Map

This tool will help you to identify the policy intent and policy design process that has led to the service that you are designing at HMRC. Any gaps or ideas for what should have happened will also be identified at this early stage.

Practicalities

Time
1 hour (with policy team)
3-4 hours (if research is required)

Materials
Background information on policy, media coverage of policy, Policy Map tool, marker pens, post-its notes and a camera.

Facilitation
To be completed by the core project team, facilitated by the project lead. Where possible bring in policy design team and minister.

Adding value through design

Policy Mapping will help you and your teams to appreciate the intent behind policy, and understand the design process that has already taken place.

Gaps in this process are opportunities for HMRC to demonstrate the value of the teams design thinking and potentially support policy design ‘further up the chain’.

The example on this page is of a speculative design prototype for the Assisted Dying Bill that was used by MP’s to engage with citizens on this subject.

Design tool

Policy Map

1 Start by writing a headline description of the policy you are mapping here.

2 Working your way around the map, list everything that you know about how the policy has been designed.

3 Using different coloured sticky notes list everything that *'should'* have happened in the policy design process. *i.e. - Where are the gaps?*

Policy Map

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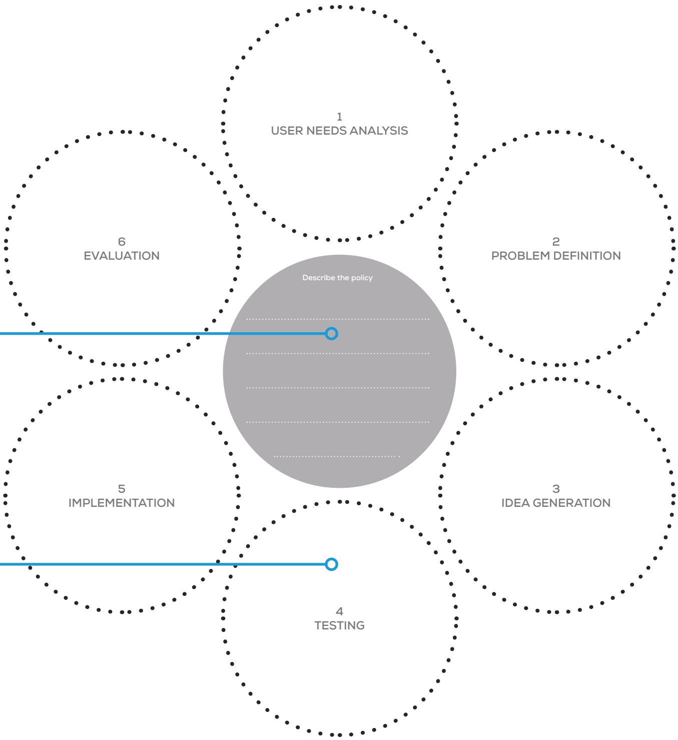
How to use this tool
To be completed by the core project team, facilitated by the project lead. Using post-it notes identify what you know has happened at each stage of the policy design process.

When to use this tool
Use this tool to investigate how the policy has been designed at the briefing stage of projects.



Stakeholder Map

This tool will help you to better understand the extent and impact of your decisions and to make sure that the right people are engaged in the process.

Practicalities

Time
45mins-2 hours

Materials
Stakeholder mapping tool, marker pens, post-its notes and a camera.

Facilitation
Identify a lead in your group who will prompt a discussion and make sure ideas are recorded.

If you are running multiple groups in the same session, ensure that a lead is assigned to each group.

What is it for?

By identifying your stakeholders and drawing a map of their relationships and interactions you will be able to see your project from a broader perspective.

This tool will help you to better understand the extent and impact of your decisions and to make sure that right people are engaged in the process.

Every action takes place in a certain environment and engages a range of different people who have a stake in a given system. Innovation and transformation will only be achieved and fit for purpose if everyone involved in the in the system, whether key or peripheral, are part of the process.

In this context, stakeholders are institutions or individuals, who play roles in decision-making, funding, implementation, delivery and use of your service/policy.

There are also wider parties such as external suppliers, private sector competitors, interest groups or international bodies/European Commission, who even if not directly involved in your project, will have an impact on your success.


ENQUIRY
GOAL
pdr.

How do I use stakeholder mapping?

Use the map to identify and plot which institutions, people and places are involved in your project or could influence it. Use different coloured post-it notes to indicate service users and providers.

The map has three parts.

Start with the inner circle to identify stakeholders with the strongest relationship to the project – the ones that are directly involved in decision-making and delivery and users who will be directly affected by your project.

The second circle should include stakeholders, who will take part in your project, but will not take decision on how the project will look like. This could include support services (IT, finance, maintenance), suppliers, external partners, etc.

The third part is for external stakeholders who are not involved in the project, but can influence it somehow like competitors from the private sector, European legislation, public transport or media.

Having identified all the stakeholders, determine the relationships and interdependencies between them.

There are rarely single lines; relationships can be multi-threaded and complicated. By assessing the relationships, you will be able to see potential organisational problems and opportunities.

Once completed, a stakeholder map will inform your next steps, for example; identifying *who needs to know about the project or who needs to be actively involved.* Ensuring you have all key decision makers and influential groups involved.

Design tool

Stakeholder Map

1 Start by writing the problem that you are solving in the middle of your map

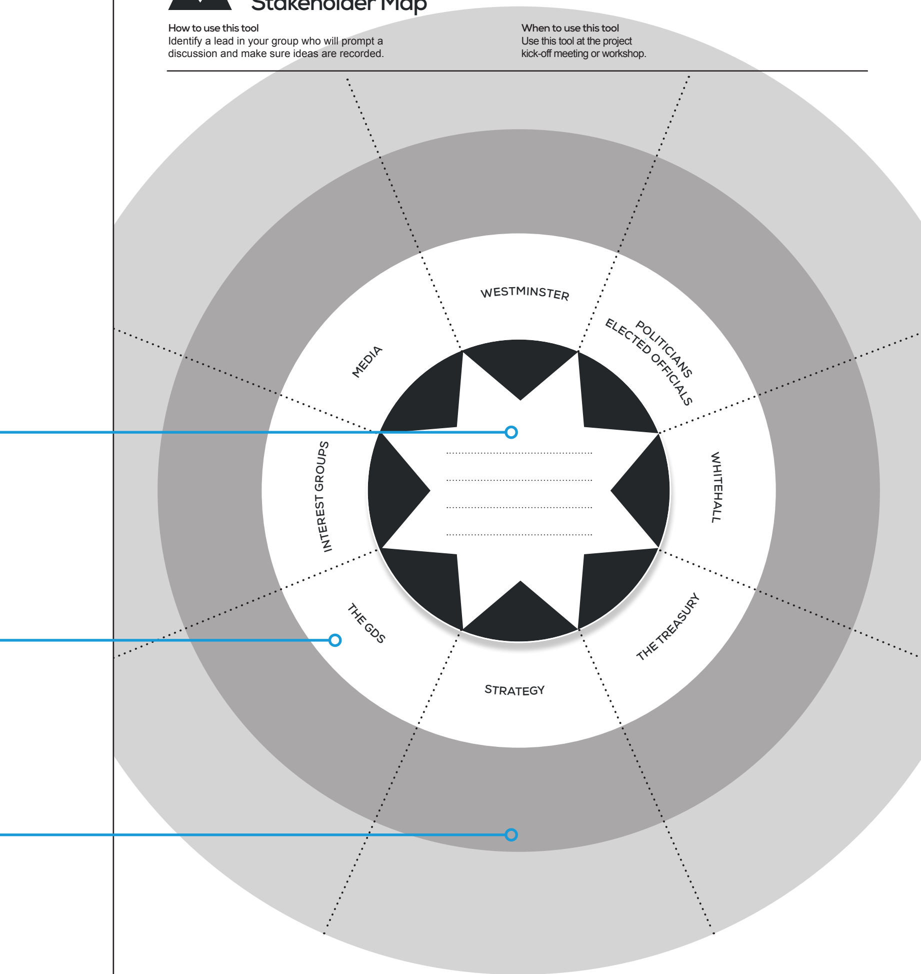
2 In turn, think about each of the sections and identify stakeholders in your work.

3 Now arrange these by importance to your project. Stick the most important ones closest to the centre and those least important towards the edge.

Stakeholder Map

How to use this tool
Identify a lead in your group who will prompt a discussion and make sure ideas are recorded.

When to use this tool
Use this tool at the project kick-off meeting or workshop.



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User Research Framework

This framework tool will help you to plan an effective user research study with the stakeholders identified in the mapping activity. Using this framework will prompt you to consider all aspects of user research activity, ensure and effective outcome for you and a positive experience for participants.

Practicalities

Time
45mins-2 hours

Materials
User research framework tool, marker pens, sticky notes

Facilitation
To be completed by the core project team, facilitated by the project lead.

What is it for?

At PDR we undertake user research with diverse sets of user groups and regularly plan research studies. As part of this work we identified eight key elements that must be considered when planning a study.

The framework tool is based on these eight elements;

- Recruitment
- Ethical considerations
- Incentives
- Time management
- Structure
- Data capture
- People
- Location

Once you know who you want to speak to and have a good idea about what you want to explore with them use the tool to think through how this might look like as a user research study.

For some areas this might be straightforward, but for other areas you might need to seek out other people, organisations and colleagues that can help you.

How do I use the framework?

Every user research study is different, use one framework tool per-study to ensure you are planning your activities properly.

As an example, a study would be defined as *'interviews with children'*, you would use the tool to define this in detail and this may include a number of activities and locations.

It is recommended that the framework is completed with all members of the core project team. How many studies and how many times you replicate these will depend on a number of factors. As you discuss complete the framework be sure to investigate each of these aspects in detail.

Design tool

User Research Framework

1 Start by framing the user research that you wish to undertake. For example, something like ‘exploring activity with young people in school’ is what we are after here.

2 Now make your way around the framework noting all of your discussion points onto sticky notes. You should spend approximately 5-10mins on each area.

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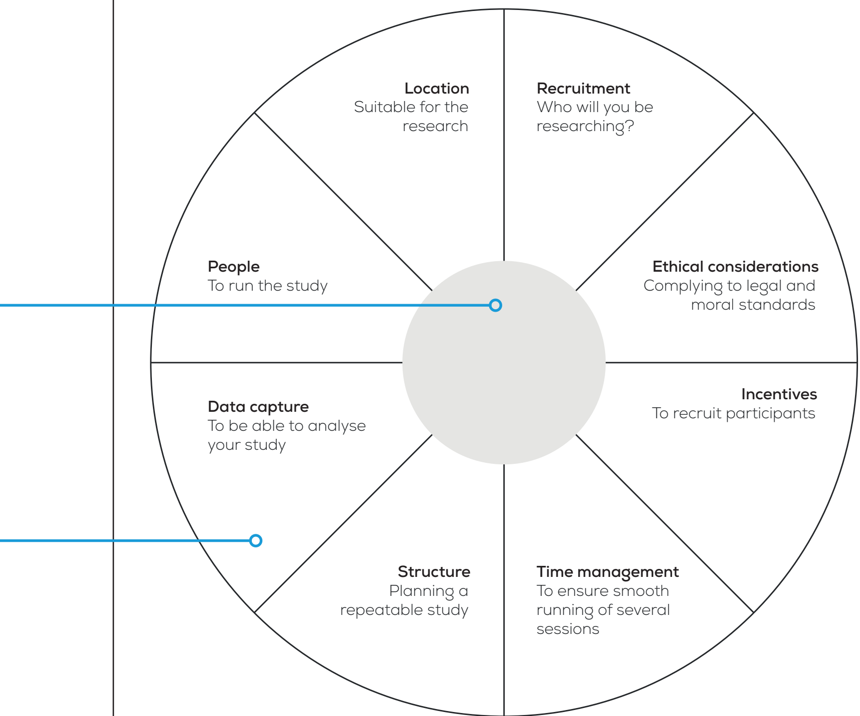
User Research Framework

How to use this tool
To be completed by the core project team, facilitated by the project lead.

When to use this tool
Use this tool before undertaking user research.



User Stories & Personas

These tools will help you to capture the needs and experiences of the people that you meet during the user research activities. Use them to communicate these needs and experience with colleagues.

Practicalities

Time
Allow 1 hour to create the questions and set up the Persona template for use in user research.

Each User Story should take between 5-10mins to create.

Materials
Persona tool templates (A3), User Story template (A4) mark-er pens, photographs, cut-outs from magazines, glue, blue tack and a camera.

Facilitation
It is recommended that you develop the persona template collectively as the core project team before using them in user studies. Then review the completed tools and generate final versions as a group.

User Stories can be captured at any point and used in combination with other tools as required.

What is it for?

Personas are archetypes of the people that use your service or are affected by your policy. This tool will help you to understand your customers and their expectations better.

Ideally, personas should be based on extensive user research and analysis of existing data. However, if this is not possible they can be generated based on your own experiences and understanding of relevant user groups. Whichever option you go for, remember to bear this in mind when using personas to inform decisions in the project.

Personas will enable you to think about the people for whom your solutions must work and reflect on their motivations, objectives, needs and lifestyles.

Personas will serve a reference point for the next steps. They will help you to identify issues with the current service/policy and to test ideas for the new one.

When you start thinking about new solutions, use personas to bring the service user into the room at key points in the development. Ask yourself *"how would your personas be affected by your ideas in their life situations"*.

How do I use personas?

Personas present the needs, behaviours, habits and attitudes of your users.

You should create between 6 and 12 different personas to give a broad enough spectrum of your model customers and ensure diverse needs are represented fairly.

Think about extreme users but not stereotypes.

An archetype would be *'John, a 27 year old service engineer from Romford'*. A stereotype would be *'John the white man van'*.

Start with inventing the name and determine the age. You should include the key points about the persona like for instance a job title, family status, place of living, hobbies and interests, personal traits, aspirations and needs.

Then you need to describe how this person is using your service – motivation for using it, attitude towards it, frequency of use, channels of access, problems that he/she might encounter. Summarise the persona with a meaningful and memorable quote from your research.

Draw a portrait or use photographs or images cut from magazines to illustrate your personas. Putting a face to your findings from the user research will make your insights visible and more empathic.

Personas will provide you with a useful tool for prioritising the features of your service and discussing possible trade-offs, bringing the voice of the citizen into key decision points.

Design tool

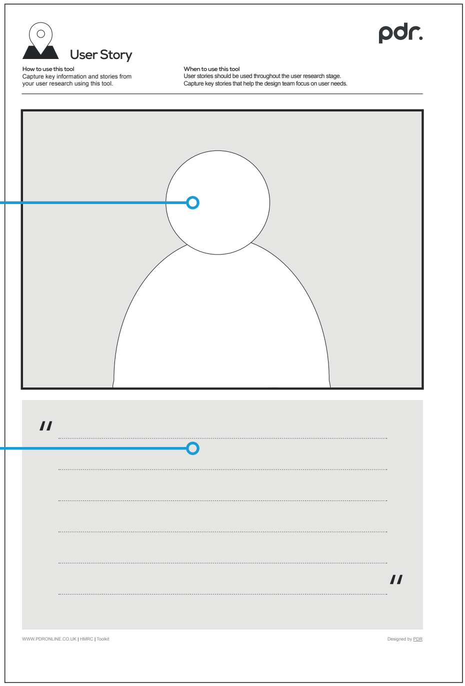
User Story

User Stories re short-sharp quotes that illustrate key user needs.

Capture them during the research stage of your work and use them as a ‘light persona’ to remind you of these needs as you move through your design project.

1 Illustrate, Sketch, Stick a photo, find a stock image of the user here.

2 Write their story here; a direct quote works best.



Design tool

Persona Capture Template

1 Draw a sketch of your persona here. If you don't like drawing find a photo from a magazine and use that instead.

2 Think about the person here

3 Write your own questions here.

4 Use this space to write notes when you are completing the persona.

5 Think about your persona's experience here, develop a set of questions relevant to your enquiry.

6 Think about your persona's role and responsibility here, develop a set of questions relevant to your enquiry.

Persona Capture Template

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How to use this tool
Plan your persona before speaking with users and use this tool to capture them during user research.

When to use this tool
Personas should be developed following periods of user research activity. Typically this will be towards the start of the project

Person

Name

Job Title

Gender

Employer

Age

Location

Waht do they want from the service?

Q:

0 1 2 3 4 5 6 7 8 9 10

Comments

What do they look like?
Draw, a picture, stick a photo or use a magazie cut-out out here.

Experience

Q:

Comments

Q:

Comments

Q:

0 1 2 3 4 5 6 7 8 9 10

Comments

Q:

0 1 2 3 4 5 6 7 8 9 10

Comments

Role and Responsability

Q:

0 1 2 3 4 5 6 7 8 9 10

Comments

Q:

0 1 2 3 4 5 6 7 8 9 10

Comments

Q:

Comments

Q:

Comments

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Customer Journey Map

Customer journey maps are a great tool for visualising a person's experience of a service or policy through the whole set of circumstances and tasks.

Practicalities

Time
From a few hours to several days, depending on the complexity of the subject.

Materials:
Customer journey map template (A1/A0), marker pens, post-its, blue tack, camera

Facilitation:
This tool requires some experience and visual design skills, if you don't feel confident enough, ask an expert to help facilitate the workshop and produce a clear diagram of your customer experience (you may have expertise within Ingeus that can support you).

What is it for?

Customer journey maps are a great tool for visualising a person's experience of a service or policy through the whole set of circumstances and tasks. It is a narrative breakdown of the process of accessing your service/interaction with your policy in a chronological order.

A diagram should include every moment (touchpoint) at which a person comes into contact with the service/policy from learning about it to the end of using it and gathering feedback. Journey mapping is not just an overview of interfaces and interactions.

It identifies how people feel at each stage of the service journey, revealing expectations, key decisions and identifying potential gaps between the ideal process and the one that is actually experienced.

This allows you to define key qualities of the service, understand potential difficulties, how people struggled with them and how you can add more value and enhance the experience.


DIESEL
Name: Suzanne
Slogan: "Local Authority"
About Me:
Technology use
Name: Anne (Manager)
Slogan: "Looking at a more flexible service"

How to use Customer Journey Mapping?

Customer Journey maps should be based on the research of people who interact with your service or policy. You can do this in two ways;

Option 1

Invite your users to the workshop and facilitate a customer journey mapping activity with them individually. This is the preferred method of undertaking this exercise.

Option 2

A quicker but less robust method is for you or do the mapping based on data captured during the first stages of the project. In this case you would base the map on interviews, vox-pops, and personas.

Firstly, map all the key touchpoints at which the person comes into contact with the service/policy from when he/she first becomes aware of it to what happens after they have used it. When you speak with people, encourage them to focus on their activities and interactions and keep an eye on their language and emotions.

Try to get as many details as possible – people, places and things they encounter and record how they feel about particular moments of their journey.

Once you complete the maps for a range of your customers/all your personas discuss emerging patterns across these journeys.

This exercise will help you to clarify the complex experiences of your customers. The maps will visualise different modes of interacting with the service/policy, highlighting all touchpoints and opportunities for enhancing the customer experience.

Design tool

Customer Journey Map

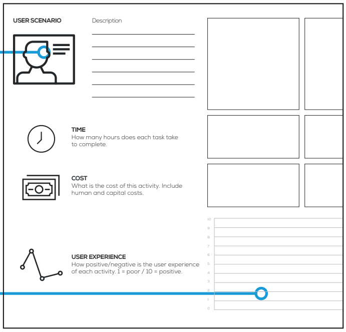
1 Write down all of the service touchpoints that you can think of.

2 Score each touchpoint +/- 10 points.

3 Estimate how long this task takes customers to complete.

4 Estimate the cost of delivering this touchpoint for the provider.

5 Note any ideas, observations here.


USER SCENARIO
Description
TIME
How many hours does each task take to complete.
COST
What is the cost of this activity. Include human and capital costs.
USER EXPERIENCE
How positive/negative is the user experience of each activity. 1 = poor / 10 = positive.


User Journey Map
PROJECT TITLE
DATE

Ideation

It is time to use your insights and translate them into new service/policy ideas.

Practicalities

Time
From a couple of hours to a whole day event.

Materials
Flip charts, marker pens, post-its, blue tack and a camera

Facilitation
Presence of an expert will help you to compile the proposals and draw on the best ideas

What is it for?

Now that you have mapped the key people and organisations, learned about your users, their situations and experiences; it is time to use your insights and translate them into new service/policy ideas.

Because of the approach you have taken the ideas generated in this stage will directly respond to the user needs uncovered earlier in the project.

Ideation refers to the process of generating new ideas, by providing a simple set of rules or structure to this process you can ensure that focus is maintained and the ideas generated are high-quality and relevant to the challenge you are tackling.

How to use ideation?

Ideation activities work best in a workshop setting with the facilitation of an expert to capture and build upon new ideas.

During such ideation events different brainstorming techniques, association exercises, sketching or performing can be used. As mentioned before, it is vital to involve people with diverse expertise, but most importantly the people for whom your solution should work.

You should aim to create as many ideas as possible, so do encourage unusual thinking, combine ideas and think about the opposite situations. What may seem unrealistic can spark a new thinking or be adapted to be viable.

Do not criticise and discourage others' ideas. Once you decide you have exhausted the possibilities, group and discuss your ideas.

The ideas can then be subject to a process of prioritisation and refinement to arrive at workable and user-friendly concepts.


A RELATIVE
BRING A GRANDCHILD
A FRIEND
SCHOOL DAY REVISITED
The Customer Journey Canvas
BETH
Daycare Centre
Rondell house
US
PRE-SERVICE PERIOD
SERVICE PERIOD
POST-SERVICE PERIOD
EVENING CLUB TOGETHER FOR EARLY ONSET DEMENTIA
Arts & Crafts in the evening, for Early onset
Not well known
No website
Nothing
Limited
Community groups (Solis)
Ty-Hapus
Pick up (mini bus) 9am
Journey
Arrival welcome sign in
Rest Break
Contacting Carers?
Social Worker/ Healthcare
Part of Customer Care Plan?
Table Chat
Morning activity
Rest Break
Tea/coffee
Hair dresser
Rest break
Nothing
N/A
Lunch
Games
Rest Break
Bathing
Snack
Rest Break
Home time
Pick up (Daughter)
Daughter informs friend of the service
Out of place but no other options
Not happy but has no other options
Stimulated motivated
Comfortable environment
Similar to previous providers
Interaction with staff - Great!
Struggles with other Clients
Staff Busy
Loves Visits (hair dresser etc)
Dislikes repetitive activities!
Not Stimulating
TIME BANKING SCULPTURE
A Picture of Betty!
INSTANT MEMORY CABINET -COMFORTING
Big Screen Display
SELECTION OF ZONES / AREAS.
Memorabilia cabinet
'WORK' AREA - H'DRESSER
LEISURE AREA - SALON PHYSIO MASSAGE
GRADUALLY EVOLVE THE LIVING / DINING AREA.
Job related activities - gardening cleaning
AN OPEN FIRE / STOVE
IMAGES OF THE LOCAL COMMUNITY PAST & PRESENT
Warm/Inviting Reception area
Different Lighting for mood or purpose
make it Homely
Dining becomes a Café/Restaurant experience.
Evenings for Support groups
MEMORY BOARD CHANCE TO TALK ABOUT THE 'GOOD TIMES'
Images of Local Landmarks Past & Present
outdoors + wildlife plant life, bird feeders
Zoned areas Break up big Room
Stimulate Emotive
VARIATION IN FURNITURE & FURNISHINGS
COMMUNAL BENCHING
Opportunity to become "the gardener" etc. take on a job/responsibility
MINI ALLOTMENT
BUILD A NETWORK OF CONTRIBUTERS I.E. ENTERTAINMENT / ACTIVITY
OPEN UP CURTAINS LIGHT & AIR
SPONSORED MEMORY PACKS
BOOTS - AROMATHERAPY MEMORY BOX
CONNECT WITH YOUNG KIDS FROM SCHOOLS - SHARE INFO / SKILLS
USE OF SCHOOL FACILITIES From 3pm - 5pm
Visitors Performances
Petting zoo visit
Art therapy
Fitness classes
Visiting health professionals
Day trips
Info wall (events)
BRING THE OUTSIDE IN

Three ideation methods

1: Classic

A very common ideation technique. Can work extremely well but it relies on a facilitator to ensure the 'rules' are adhered to and the design challenges are presented to keep ideas flowing.

2: Six-five-three

A highly structured paper-based ideation method featuring six participants taking five minutes to generate three ideas. Once complete participants move onto the next persons ideas and build from there, generating a further three ideas in five minutes, and so on.

3: Carlsberg

Taken from the advertising slogan *"If Carlsberg did..."* this technique invites participants to think about the qualities and approach that different organisations or people might take to solve the set challenge

Prototype Test Planner

A prototype is something that approximates appearance and behaviour of your ideas, so that it is real enough to get feedback from users interacting with it.

Practicalities

Time
This varies considerably from very low-fidelity prototypes like simple sketch models that can be created in a matter of hours, to creating physical objects or mock-up digital applications. Tests with users can take several days or longer for more complex prototypes.

Materials
Paper, cardboard, scissors, tape, glue, foam core, pens, markers, string, and any other material you might have at hand; note block or tablet for notes from a prototype test.

Facilitation
Rough prototypes can be made relatively easy and without an expert help; if you plan to build a more elaborate prototype, consider what expertise you will need to create and test it.

What is it for?

At this stage you will be turning your research, learning and ideas into solution concepts that can be presented to your stakeholders and tested by them.

A prototype is something that approximates appearance and behaviour of your ideas, so that it is real enough to get feedback from users interacting with it.

Prototypes can take different forms and be of various levels of sophistication, from simple sketches, illustrations and diagrams to psychi-cal or digital mock-ups, videos and animations.

They are particularly useful to turn abstract concepts into something tangible that relates to the context of its use.

Prototypes can help you identify ideas that are working and highlight flaws early in the process. As a result, you will able to make sure that your ideas are fit for purpose and fix any problems before the concept is finalised; potentially saving time, effort and money.


SAMSUNG
portal.ableme.wales/#/dashboard
Sunday 6 March, 2016
Next Activity
Sunday dinner at Lynne & Dave's
Today at 9:00 pm

How to use prototyping

Assuming that you have developed a number of prototypes that you want to test, deciding on the right approach depends on the ideas you want to try out, questions you want to answer, the stage you are at in a project and the resources you have available.

Start small

Prototyping takes an iterative approach, so start small with a question 'how people would react to the idea?' or 'what if the solution looked like this?'.

Define the scenario

Choose a scenario of use and key touchpoints and features you want to test. When describing this to other people clarify the background context and provide the guidelines of use.

Measurement

Think about how you will measure it and what metrics you will use.

Minimum viable product

Built a very rough approximation first and gradually add more functionality until your prototype will be ready to be tested. Once your prototype is ready, invite people to test it. For example, you may start with a paper prototype of the key elements of a new app before developing a beta digital app for testing.

Task analysis

Observe how your user approaches specific tasks and interacts with your prototype. After the test, ask the test person to reflect on the experience.

Focus on what matters

Make sure you have captured everything that you were trying to discover.

Design tool

Prototype Test Planner

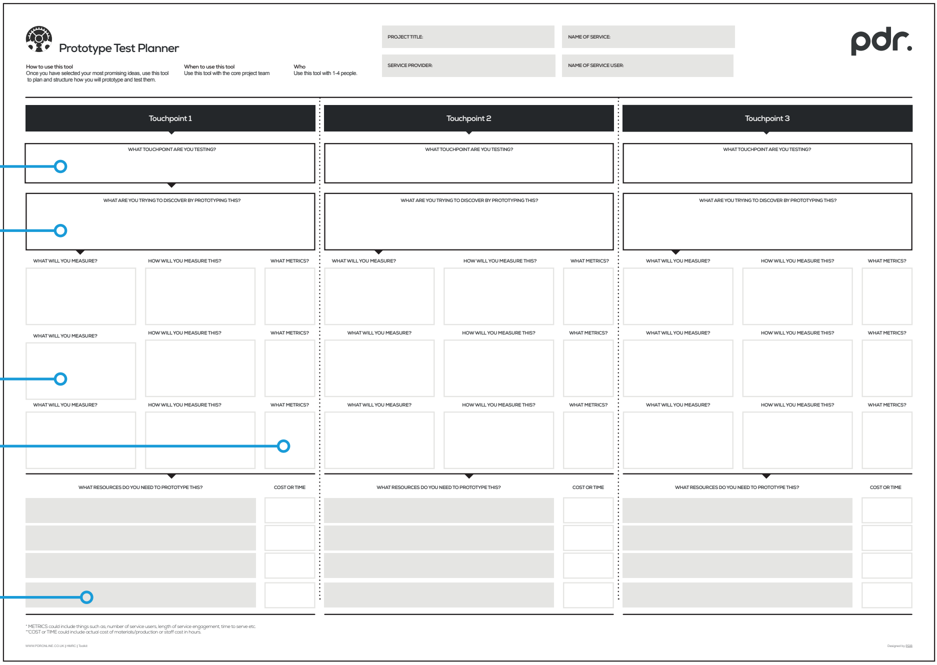
1 Start by identifying the touchpoints that you want to test. *For example; in branch experience.*

2 Describe what you are trying to discover by developing a prototype of this service touchpoint. *For example; The staff reaction to it.*

3 Based on this, now think about the specific things you will measure in the prototype test. *For example; Errors processing customer enquiry.*

4 And identify the metrics you will use for this. *For example; length of interaction.*

5 And finally consider the materials you will need to run the prototype test. *For example; staff time, shop fittings, marketing materials.*



Prototype Test Planner
How to use this tool
Once you have selected your most promising ideas, use this tool to plan and structure how you will prototype and test them.
When to use this tool
Use this tool with the core project team
Who
Use this tool with 1-4 people.
PROJECT TITLE:
NAME OF SERVICE:
SERVICE PROVIDER:
NAME OF SERVICE USER:
pdr.
Touchpoint 1
Touchpoint 2
Touchpoint 3
WHAT TOUCHPOINT ARE YOU TESTING?
WHAT ARE YOU TRYING TO DISCOVER BY PROTOTYPING THIS?
WHAT WILL YOU MEASURE?
HOW WILL YOU MEASURE THIS?
WHAT METRICS?
WHAT RESOURCES DO YOU NEED TO PROTOTYPE THIS?
COST OR TIME
* METRICS could include things such as; number of service users, length of service engagement, time to serve etc.
**COST or TIME could include actual cost of materials/production or staff cost in hours.
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Storyboard

Storyboarding helps you to build a common understating of the key features of the idea and how they will work in a specific context.

Practicalities

Time
A simple storyboard can be created in less than an hour. If your service is complex, involving a lot of activities and you aim for the storyboard to be detailed, it can take several hours to couple of days.

Materials
poster-size paper, marker pens, other drawing materials, camera

Facilitation
You should designate one person to lead activities and discussions on the key features of your service. Some skilled graphic design/illustration help might be useful.

What is it for?

Storyboarding is a method borrowed from cinematography.

It is a visual story, much like a comic strip, that in a series of images presents the key elements of your idea and explains the interactions between them and the user.

Images are universal and stimulate imagination, which makes storyboard an ideal communication tool.

Moreover, while creating a visual scenario of how your concept will work in the context of its use, you are able to once again reflect on a journey through all the touchpoints and further improve your solution.

Storyboards helps you to build a common understanding of the key features of the idea and how they will work in a specific context.

You can use them to better communicate what impact your idea will have and to gain support from your stakeholders.


INNOVATING PUBLIC SERVICES IN CHALLENGING TIMES
#SPIDERDUB15

How to I use storyboards?

By this time your idea should be fairly clear and main features determined, prototyped and tested.

Gather your whole project team and engage delivery staff. Determine the setting and key scenes in your story – list the main events of interacting with your service/policy from start to finish. Discuss in a group which moments/ touchpoints are the most crucial and representative of your solution at the beginning, in the middle and at the end. Identify your main characters.

For a greater consistency, you can use your personas and create several storyboards to show different journeys offered by your solutions and make sure it is fit for a broad range of users.

Start by introducing your character and the problem he/she has; then sketch his/her journey through the touchpoints of your solution, and end with an impact of that journey.

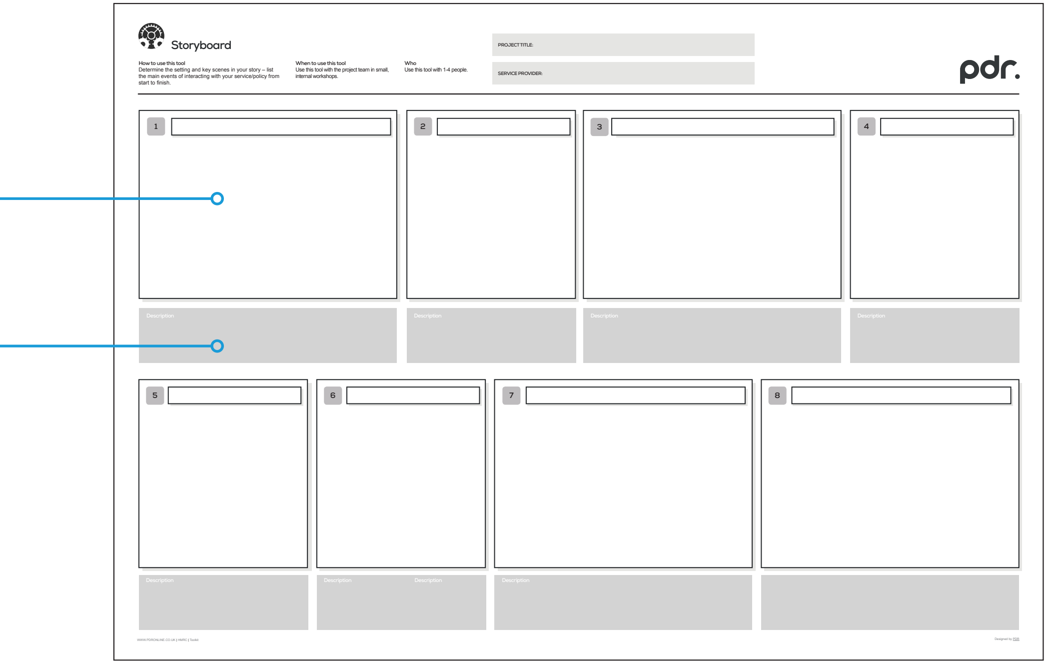
Use different perspectives and angles, add some props to your scenes, but remember to focus of the main message - your service and how it relates to your users.

Design tool

Storyboard

1 Identify which touchpoints and interactions you will show in each ‘cell’. You might find it useful to use post-it notes to plan out your story.

2 Add any descriptive notes underneath each cell to support the story.


Storyboard

How to use this tool
Determine the setting and key scenes in your story – list the main events of interacting with your service/policy from start to finish.

When to use this tool
Use this tool with the project team in small, internal workshops.

Who
Use this tool with 1-4 people.

PROJECT TITLE:

SERVICE PROVIDER:

pdr.

1

2

3

4

Description

Description

Description

Description

5

6

7

8

Description

Description

Description

Description

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Designed by PDR

Service Blueprint

The blueprint provides everyone involved in the process, whether at front of house or in the back office, with understanding of their contribution and responsibility.

Practicalities

Time
From a couple of hours to several days for a complex service relying on a significant level of service support infrastructure.

Materials
Blueprint template or a poster-size paper, marker pens, post-its and a camera.

Facilitation
The help of service designer is recommended to facilitate the session, compile the information and visualise it in a clear and compelling way.

What is it for?

The service blueprint is the archetypal service design tool.

As a tool, the service blueprint is relatively straightforward, but its content needs plenty of consideration.

It allows you to break down complex processes to individual stages and plan your resources and actions to implement and sustain your idea. It is a target operating model of your service/policy, showing in detail all the elements and channels, and the role of delivery and support staff as the user follows the path through the service from pre-service stage to service use and post-service.

The blueprint provides everyone involved in the process, whether at front of house or in the back office, with understanding of their contribution and responsibility and ensures a coherent user experience.

This tool can be useful as well to analyse how an existing service functions to identify potential areas for improvement.


NICOLA
4: Customer Journey Mapping

How do I use service blueprints?

Invite all your core stakeholders (senior management, service delivery, support staff and service users) to a workshop and discuss all the touchpoints, back-office processes, customer actions and experiences over the entire user's journey.

Think about what happens chronologically over time – before accessing the service, during and after its use.

Consider the following elements:

Physical evidence

Every tangible element of the service that your customer comes into contact with, *e.g. website, signage, forms, staff.*

Customer actions

This is your customer journey, it is what your customer would do when accessing your service and what is required of them to do, *e.g. look at the website, call a customer services, fill the form, book an appointment, provide documents etc.*

Staff actions (front of house)

What your staff do that is visible to the customer, direct interactions of members of staff and a customer, *e.g. greet customer, provide information, deal with the case.*

Staff actions (back-office)

Staff actions that are not visible to your customers, *e.g. IT, finance, admin, deliveries.*

Supporting actions

Internal system, tasks and staff interactions that make service delivery possible, *e.g. recruit new personnel, promote your service, create forms.*

Customer expectations

Feelings, thoughts, experiences, outcomes and feedback.

Having captured all these elements, it will be possible to produce a visual representation of how the proposed solution should work and the assets required to enable this.

Design tool

Service Blueprint

1 Write the project name and date here

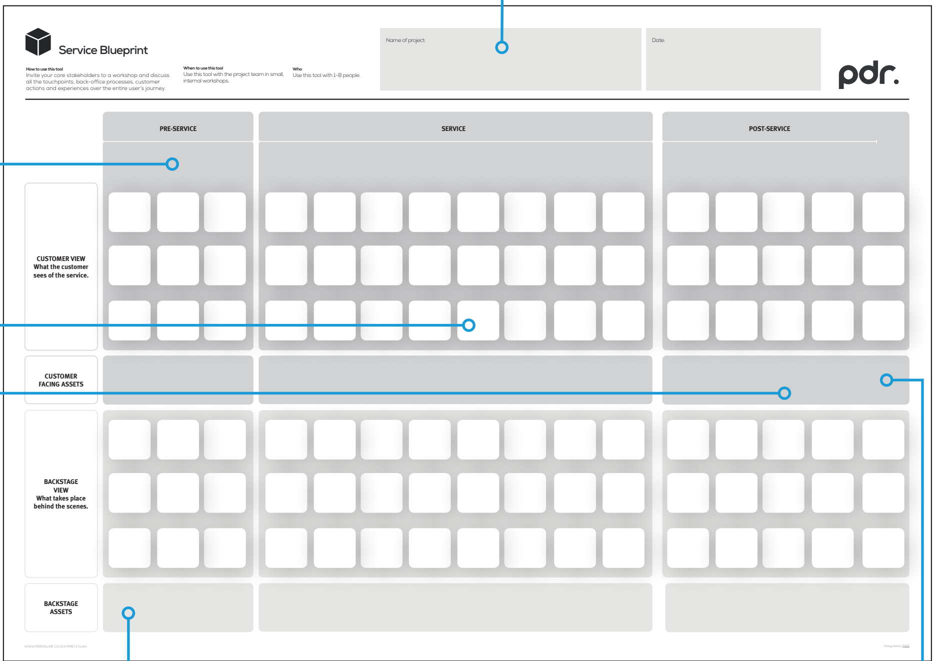
2 Pre-service - What happens before the service begins? *Typically this would include marketing and sales activity.*

3 Service - What happens when the service is being delivered. *Typically this will include operational activities.*

4 Post-service - What happens after the service has been delivered. *Typically this will include marketing or after-sales support.*

5 List all of the customer-facing assets required to deliver the service here. *For example, this might include marketing or operational materials.*

6 List all of the backstage assets required to deliver the service here. *For example, this might include CRM systems or internal documents.*



Service Blueprint
How to use this tool
Invite your core stakeholders to a workshop and discuss all the touchpoints, back-office processes, customer actions and experiences over the entire user's journey.
When to use this tool
Use this tool with the project team in small, internal workshops.
Who
Use this tool with 1-8 people.
Name of project:
Date:
pdr.
PRE-SERVICE
SERVICE
POST-SERVICE
CUSTOMER VIEW
What the customer sees of the service.
CUSTOMER FACING ASSETS
BACKSTAGE VIEW
What takes place behind the scenes.
BACKSTAGE ASSETS

Service Roadmap

A service roadmap is a detailed schedule of activities that will map out the stages from service blueprint to operational service.

Practicalities

Time
2-4 hours, depending on complexity.

Materials
Roadmap template, marker pens, post-it notes.

Facilitation
The roadmap can be produced by the project lead or as a project team.

What is it for?

At this stage, you know exactly what your service/policy is going to be like.

You have decided on its features and prepared a detailed plan of how it is going to function. Previous steps, especially developing a service blueprint, helped you to identify what resources and actions are needed to make your solution work.

Now you need to start planning how to turn the blueprint into an operational service.

The service roadmap is a detailed schedule of activities that will progressively lead you to achieving your objective. Generating a concrete action plan together with your team ensures all team members are aligned towards the project goals and understand what needs to be done to accomplish them.

A roadmap helps you to monitor your progress, evaluate success of implementation and to keep the momentum.


Find a job
Start a business
Get advice

How do I use a service roadmap?

Assemble your project team together with representatives of the staff who will be delivering your service.

Look at your service blueprint and identify which touchpoints, front of house interactions, back office interactions and underlying processes are needed at a minimum for the service to work. These will form an agenda to make the alpha version of your service.

Set tasks
Then establish what needs to be done to move your service to the beta (working prototype) and final versions.

Define goals
Define a clear goal for each stage and set ambitious but realistic deadlines.

Measure
Determine how you are going to measure your progress, think about metrics and targets.

Pin it up
Put the roadmap on the wall so that everyone could see what has been achieved and what still needs to be done.

Celebrate
Be flexible and remember to celebrate your accomplishments.

Design tool

Service Roadmap

1 Write your project name here

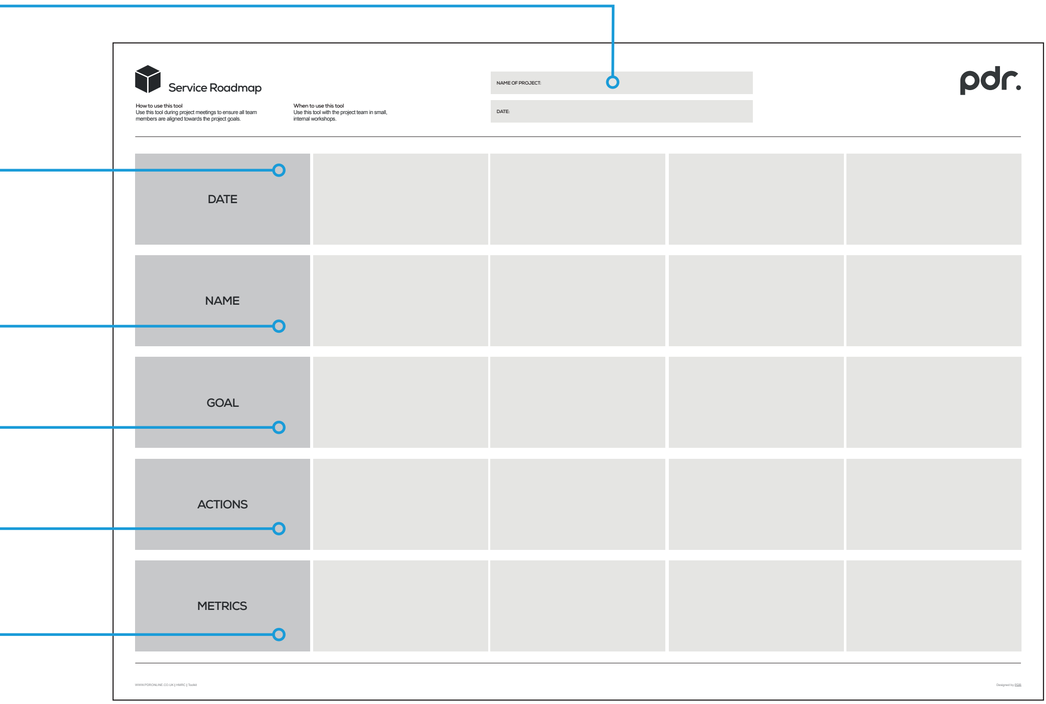
2 Start by setting four key milestones, add these dates into the top row.

3 Give each of these a name. *For example; Beta version of site.*

4 Identify a key goal for each stage of development. *For example; test product with 10 users.*

5 Describe the actions you will take to achieve this goal

6 List the metrics you will use to measure this.


Service Roadmap
How to use this tool
Use this tool during project meetings to ensure all team members are aligned towards the project goals.
When to use this tool
Use this tool with the project team in small, internal workshops.
NAME OF PROJECT:
DATE:
pdr.
DATE
NAME
GOAL
ACTIONS
METRICS

Evaluation Framework

Evaluating the impact must be considered upfront at the framing and scoping stage. Involve your whole project team and invite some analytical minds.

Practicalities

Time
Developing a framework will take 1-3 hours.

Materials
Paper, marker pens, data

Facilitation
You will be able to do this on your own or with the project team.

What is it for?

Measuring and communicating impact of your project is crucial to learn lessons, adapt actions and achieve real transformation. That is why we encourage you to start thinking about your evaluation from the very beginning, and keep monitoring changes throughout the whole process till the final ex-post impact evaluation.

There is no single way to measuring impact. In some cases changes can be seen after a long period of time and it can be especially challenging to capture intangible qualities like cultural changes. However, by following the 'logic model' approach we are able to track how resources and activities are turning into outputs and outcomes that create impact.

How to I use it?

Think about the existing situation, your objective and how your project is likely to influence that situation.

Consider what evidence you need. Reflect on it on both micro and macro scale that think how to capture it in qualitative and quantitative measures.

That should give you a matrix containing a range of indicators that represent benefits to your users, your organisation and the whole society. Establish a reference point and a control group to be able to make comparisons. Record results and update your framework on each stage.

Design tool

Evaluation Framework

1 Write your project name here

2 Start by responding to each of the numbered questions relating to Ex-Ante (before the event) evaluation

3 Now make your way around the framework noting all of your discussion points onto sticky notes. You should spend approximately 10-20mins on each area.

4 Use the prompt questions to spark debate and discussion when planning your evaluation

Evaluation Framework

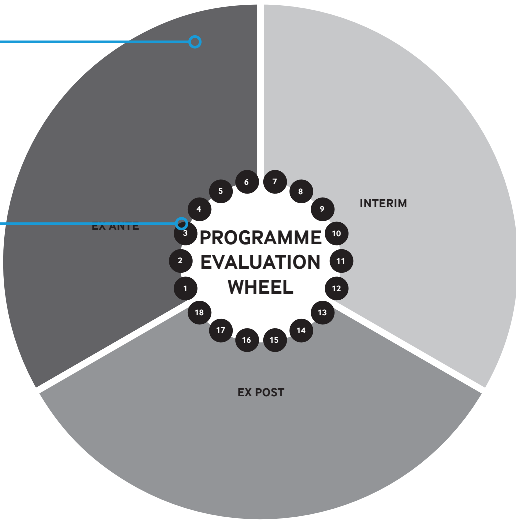
How to use this tool
Gather all of the core project team together and brainstorm (on post-its) the methods, tools and approach you might wish to use to evaluate your work. Capture them on the wheel.

When to use this tool
At the start, middle and end of your project.
Evaluation should be systematic, examining both programme delivery and impact, capturing initial goals as well as spillover effects and be used for programme and policy improvement.

PROJECT

ORGANISATION

pdr.



Evaluation framework questions

EX ANTE

1. What are your programme targets? Are measurable?
2. How frequently will the programme be e [Beginning, middle, end, once a year, two programme completion etc]
3. How will the delivery and impact be measured?
4. How will data be collected? [Telephone interview, face-to-face interview, self-reporting survey, online survey, mentor impressions etc.]
5. What will you measure ex-ante? [Hard indicators, soft indicators, sales, profit, job created, exports, entry to new markets etc]
6. What existing evaluation tools can you build on?

INTERIM

7. What will you measure during programme delivery?
8. How will you use the feedback from the participants during delivery to improve the client experience?
9. Who will you gather data from? [Directors, marketing, finance, operations, design mentors etc.]
10. How will you ensure data reliability?
11. What sample of participants will you include?
12. Will evaluation be built into the cost of the programme?

EX POST

13. What will you measure ex-post? [New spending on design, return on investment, etc]
14. In addition to the initial evaluation goals, how will you capture spillover effects?
15. How will you present the results? [Quantitative, qualitative, case studies, quotes from participants, etc.]
16. How will the evaluation be used for programme improvement?
17. How will the results of the evaluation be used? [Communicated to government etc]
18. How will interventions evaluated two years after the programme end to assess the long-term impact?


alkoholik
41

This handbook has been created by PDR and supports the training programme at HMRC 'Service design in a policy environment'.

If you have any questions about this guidebook please contact;
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PDF Tools

You can download digital copies of the tools from the following Dropbox folder:

https://tinyurl.com/zxaclrn

We love seeing our materials being used, if you run a session using the tools please tweet us a photo @pdr_online.

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