

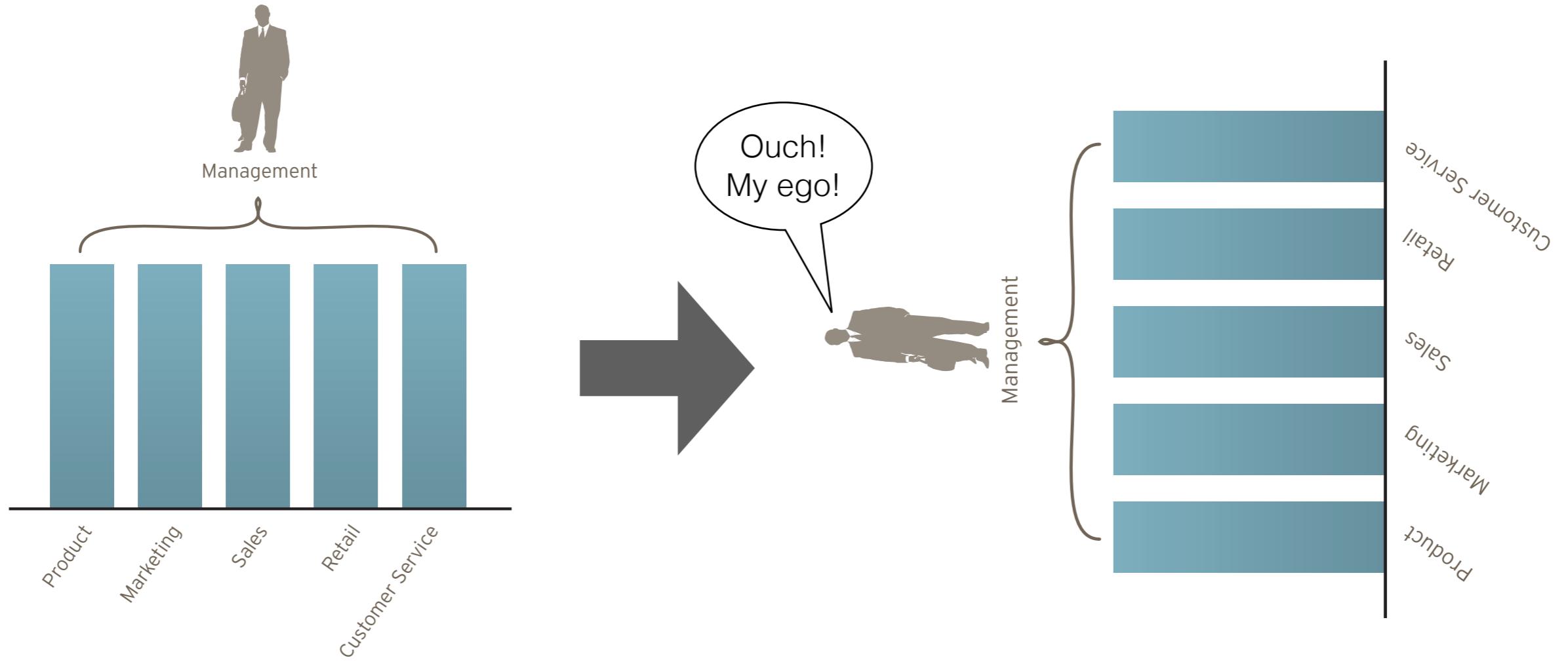
CREATING & BLUEPRINTING MULTICHANNEL SERVICES

Workshop Handouts/Cheatsheet

Andy Polaine

andy@polaine.com
@apolaine

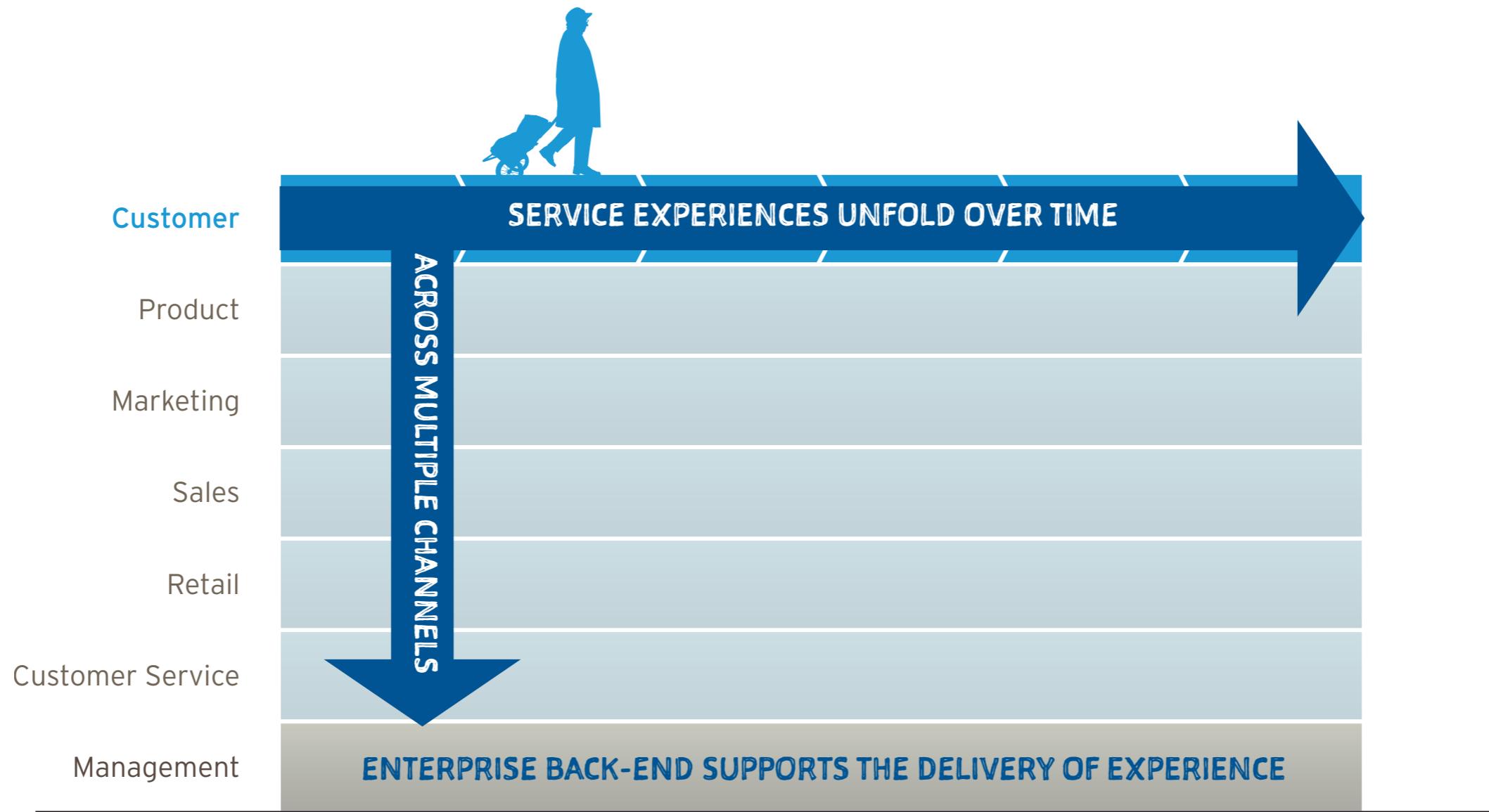
Change Perspective



If we turn the traditional management silo model on its side, you will get a different view of the service/organisational ecology.

It sounds simple, but that can be a huge cultural change for organisations and people within them who identify themselves with their role and department. You need change managers and champions within management to make that happen successfully. Apply your empathy skills client side as well as to end-users.

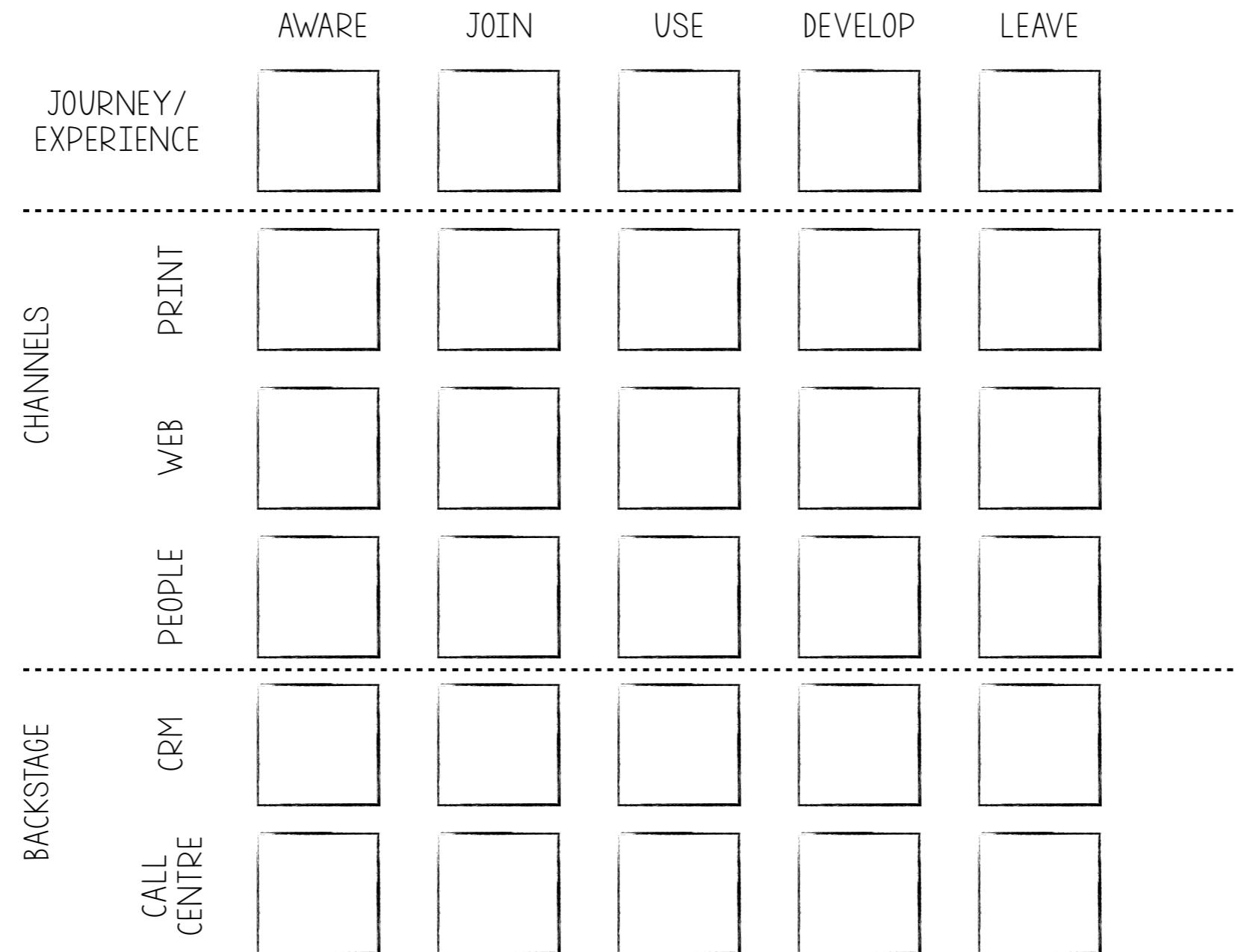
Journeys over time and across channels



Now you have a customer journey that unfolds *over time* and also is experienced across the channels.

Management then becomes about facilitating that experience and service ecology rather than trying to control it all from top-down.

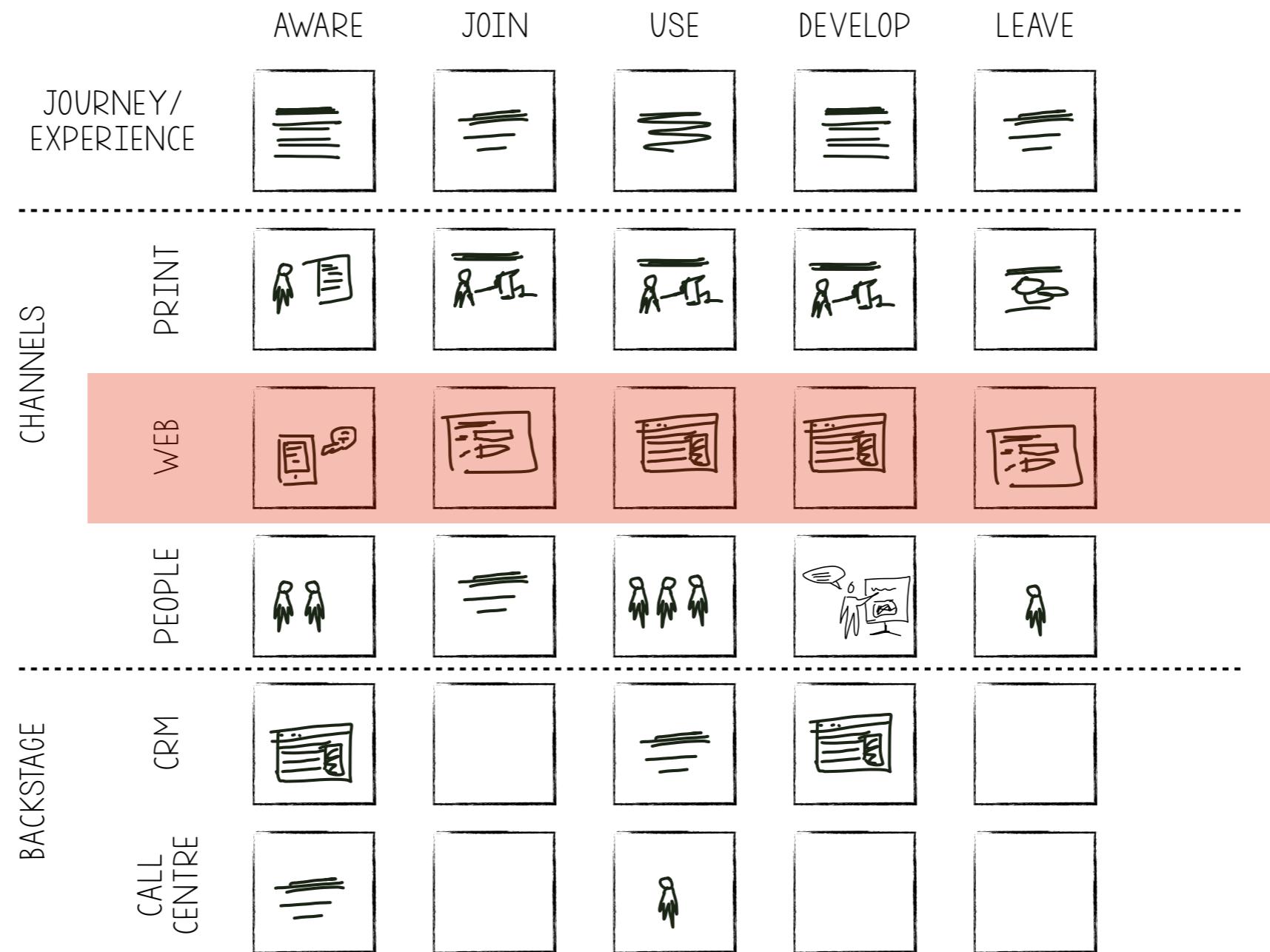
Anatomy of a Service Blueprint



The basic service blueprint form is really just a grid. Time runs across the top from left to right with the main phases - aware, join, use, develop, leave. Those names may change or expand, but they are a good place to start. You can also break them down into smaller steps as need be. The journey experience description goes across the top - that's the guiding light. Write the ideal experience (what is the user/customer thinking when we get it right?) here.

Then extend as many channels as are relevant to your project down the left side, finally setting out backstage channels/processes that are needed to support the frontstage experiences. Where the time axis intersects with a channel – for example “Join” and “Web” – is a touchpoint. In this case, maybe a web-based sign-up form.

What's going on in the other channels?



Many designers are hired to just design one channel. But it's important to think about what happens in the others, even if you don't get the chance to design them this time around. You can also use this to focus or make a case for research and to evidence your own research, showing your client how other parts of their service are having a negative (or positive) impact on other, seemingly-unrelated parts of the service. This doesn't have to be client bashing – it can help show them that they're investing their money in the wrong areas.

Start low-fi



Photo: Andri Stadler

It's easiest to start this with sticky notes on the wall. You will need a lot of wall space (sometimes they stretch over a few metres). Unfortunately this will make you look like a cliché designer. Life could be harder. Just watch out for the black roll-neck jumpers and European glasses and you'll be fine.

Or use a spreadsheet

Blueprint Draft for Book Demo

Aware → Join → Use → Develop → Leave

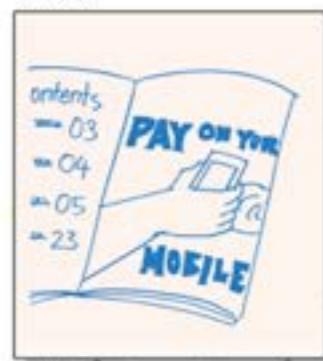
Word of Mouth

*Class aptent taciti sociosqu
ad litora torquent per
conubia nostra, per inceptos
himenaeos.*

Customer Service

*Vestibulum ante ipsum
primis in faucibus orci.*

Poster



*ad litora torquent per
conubia nostra, per inceptos
himenaeos.*

Friend Recommends

*Class aptent taciti sociosqu
ad litora torquent per
conubia nostra, per inceptos
himenaeos.*

Sign-up Call

*Ut velit purus, mollis in
sollicitudin quis, accumsan
in lectus.*

Fill in Form

*Ut velit purus, mollis in
sollicitudin quis lectus.*

Sign-Up In-App

*Class aptent taciti sociosqu
ad litora torquent per
conubia nostra, per inceptos
himenaeos.*

Sign-Up Online



Dialogue



*aliquet purus id diam
prettium pharetra?*

*Vestibulum in vehicula erat.
Cras accumsan tempor odio
in sagittis.*

Contract

*Nam varius ultricies mi, ac
commodo eros hendrerit
non. In fringilla facilisis
risus, eget mattis ante.
Vestibulum eget.*

Smartphone

*Vestibulum ante ipsum
primis in faucibus orci.*

"Help Me!"

*Ut velit purus, mollis in
sollicitudin quis, accumsan
in lectus.*

Mentor Friend

*Class aptent taciti sociosqu
ad litora torquent per
conubia nostra, per inceptos
himenaeos.*

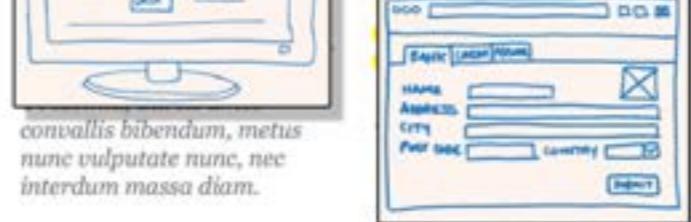
Customer Forum



*convallis bibendum, metus
nunc vulputate nunc, nec
interdum massa diam.*

Share Data

*Ut velit purus, mollis in
sollicitudin quis lectus.*



Other people start out with a spreadsheet. If you can wrestle Excel into not looking too hideous, this can be a quick way to map out the blueprint in a grid and has the advantage that you can share it with the most corporate of clients, because they are all afflicted with Excel.

Personally I find images and sketches much better because you can cut together a storyboard journey in your mind as you look through it (see later points). You can also put images in Excel of course. But repeat after me: "Microsoft Office is not a design tool".

Print it out big

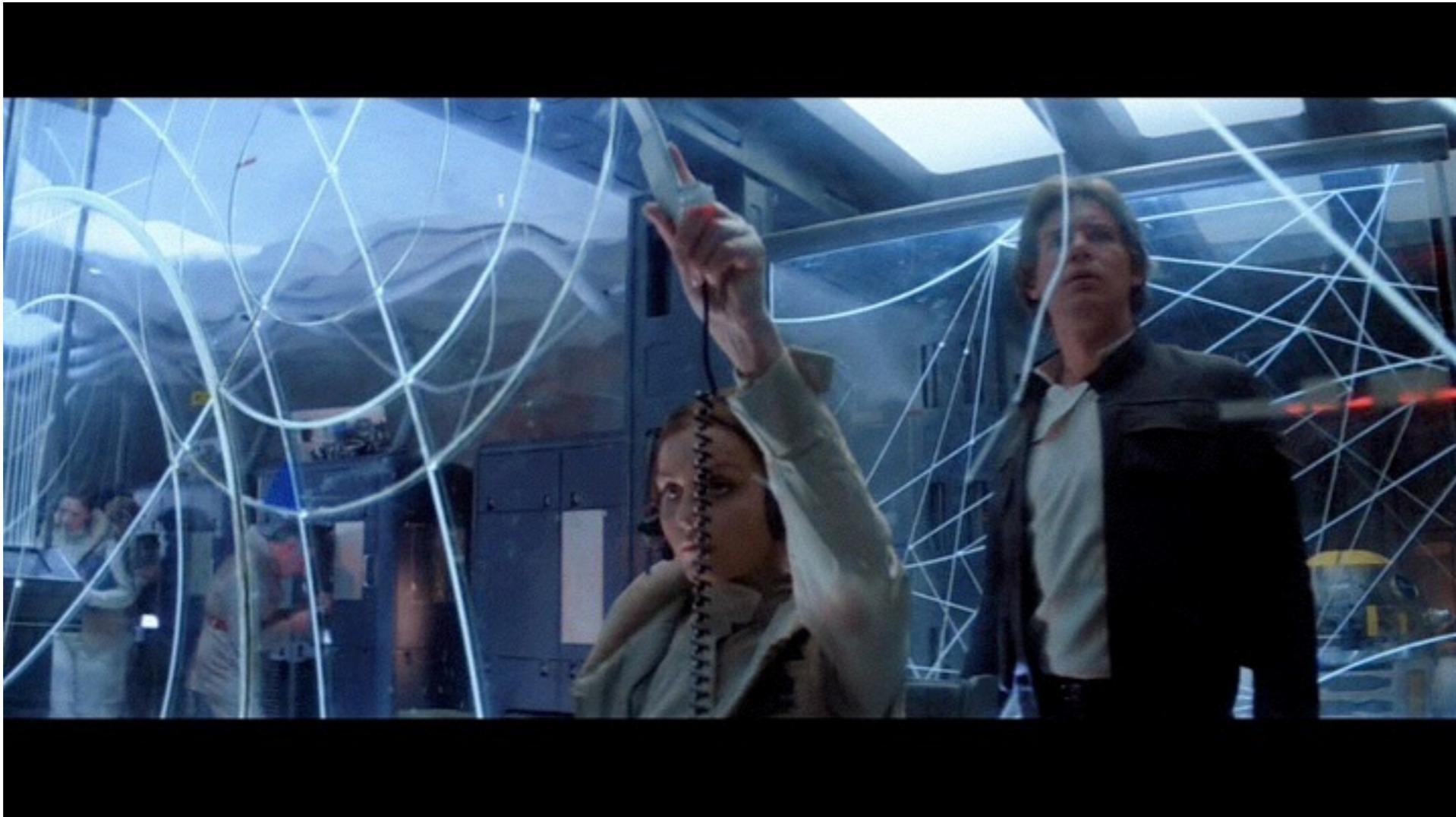
Service Blueprint Template
Project Name
Version 1.0

		Aware		Join		Use		Develop		Leave									
Frontstage Touchpoint Channels	Step	Describe key steps of the interactions here																	
	Experience	What is the experience the user has when this goes right?																	
	Face to Face	Touchpoint Title Description, sketch, image of touchpoint																	
	Print																		
	Web																		
	Mobile																		
	Location																		
	Product																		
	Customer Service																		
	I.T. Department																		
	3rd Party Service																		

 © 2013 Andy Polaine - This work is licensed under the Creative Commons Attribution 3.0 Unported License.
 To view a copy of this license, visit <http://creativecommons.org/licenses/by/3.0/>

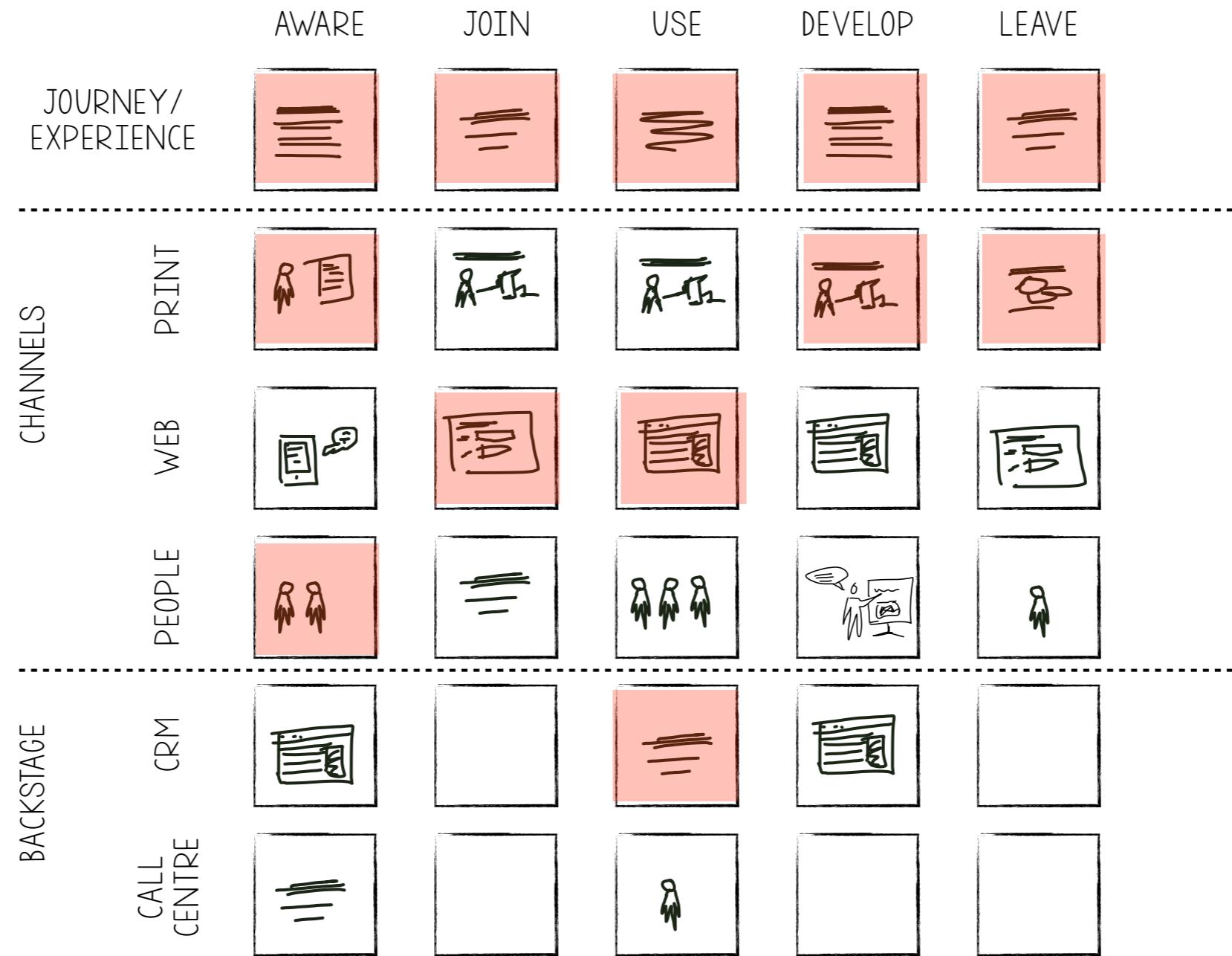
Once you start to refine the blueprint, you may need to either send it off as a deliverable to the client or print it out and put it on the wall. You will find you will need to do this very big – DIN A0 or A1 at least. And once you've printed it, you'll find all the mistake [sic] and want to print it again. Some studios use a basic grid and have a big sheet of overhead transparency plastic on top so they can write all over it and feel like those war room rebels on the planet Hoth in Return of the Jedi. Or just find a big window to tape it behind.

Or use a window/transparency



Service designers planning the Rebel Assault Service

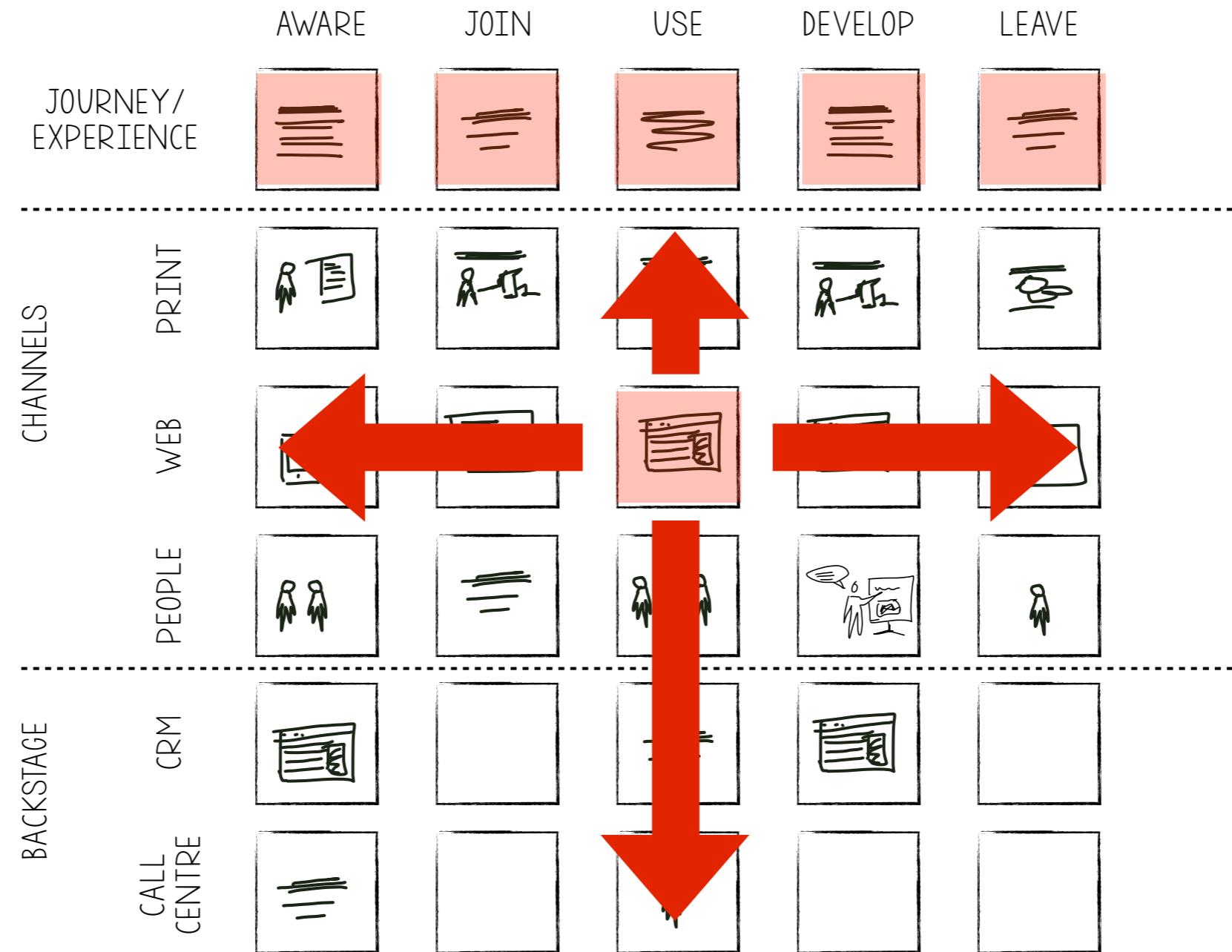
Start filling in the touchpoints



Once you have your grid, start by filling in the key touchpoints. If you are starting with an existing service that you are improving/ extending, then you can put key insights – the results of your research – in here if you have space. For example, you might have quotes from users (“I don’t understand this bill!”) or images of things going wrong or right (usually wrong) or the ideal experience.

If you are inventing a new service from scratch, you might not have all the touchpoints in your mind, so you can sketch up key ones that you know will be part of your service (like a website or physical object) and the experience you want people to have. Starting with the experience can help guide your design options and ideas. A bank is unlikely to have clowns (apart from the metaphorical ones), for example. A children’s restaurant is unlikely to have staff in pinstripe suits.

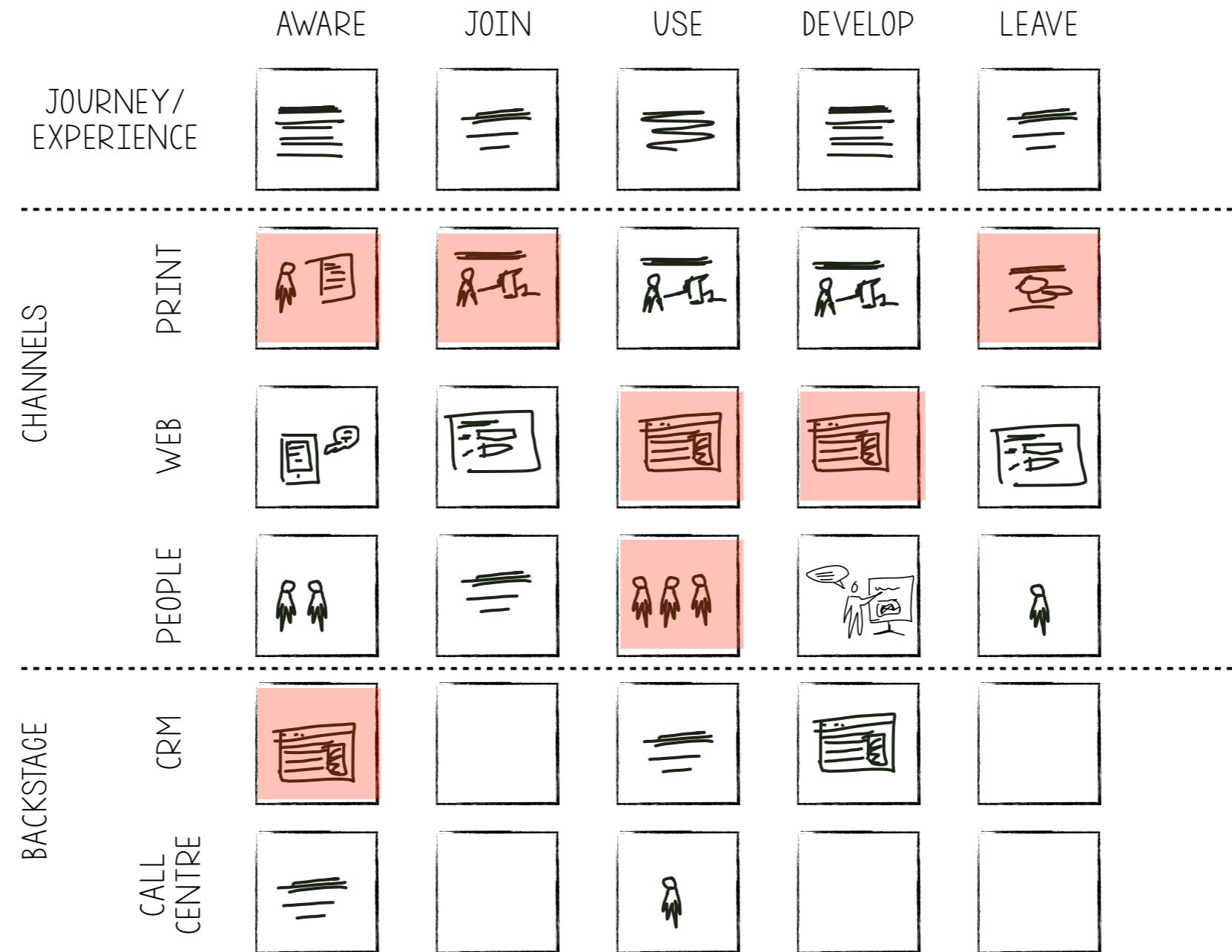
Or start with a key one and work outwards



Some people are quite process or product-oriented and struggle with thinking of the entire concept in one go. Instead of fighting the desire to think immediately of a finished solution, roll with it and put it up on the grid as a starting point. Then ask, "okay, here's the touchpoint, now how do I find out about it or start using it? How do I expand my usage or leave the service? Etc." Then expand across channels asking similar questions. You will find that the initial touchpoint ends up being changed anyway.

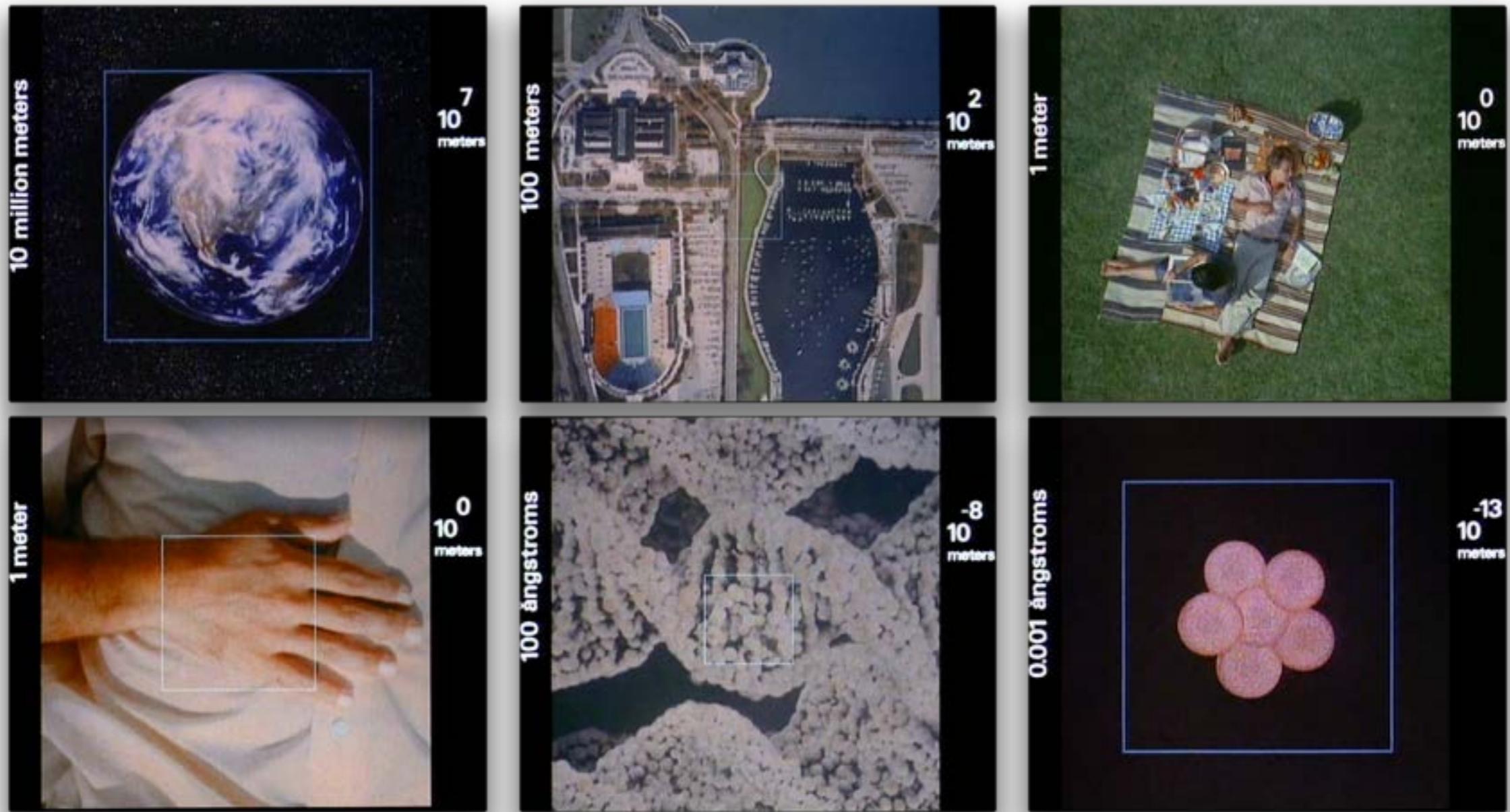
This forces everyone to think through the details beyond a single channel and you can just step through the entire service ecosystem that you are creating and flesh it out. N.B. You don't have to have something in all channels all the time. Some services just use a couple.

Prioritise key touchpoints to develop



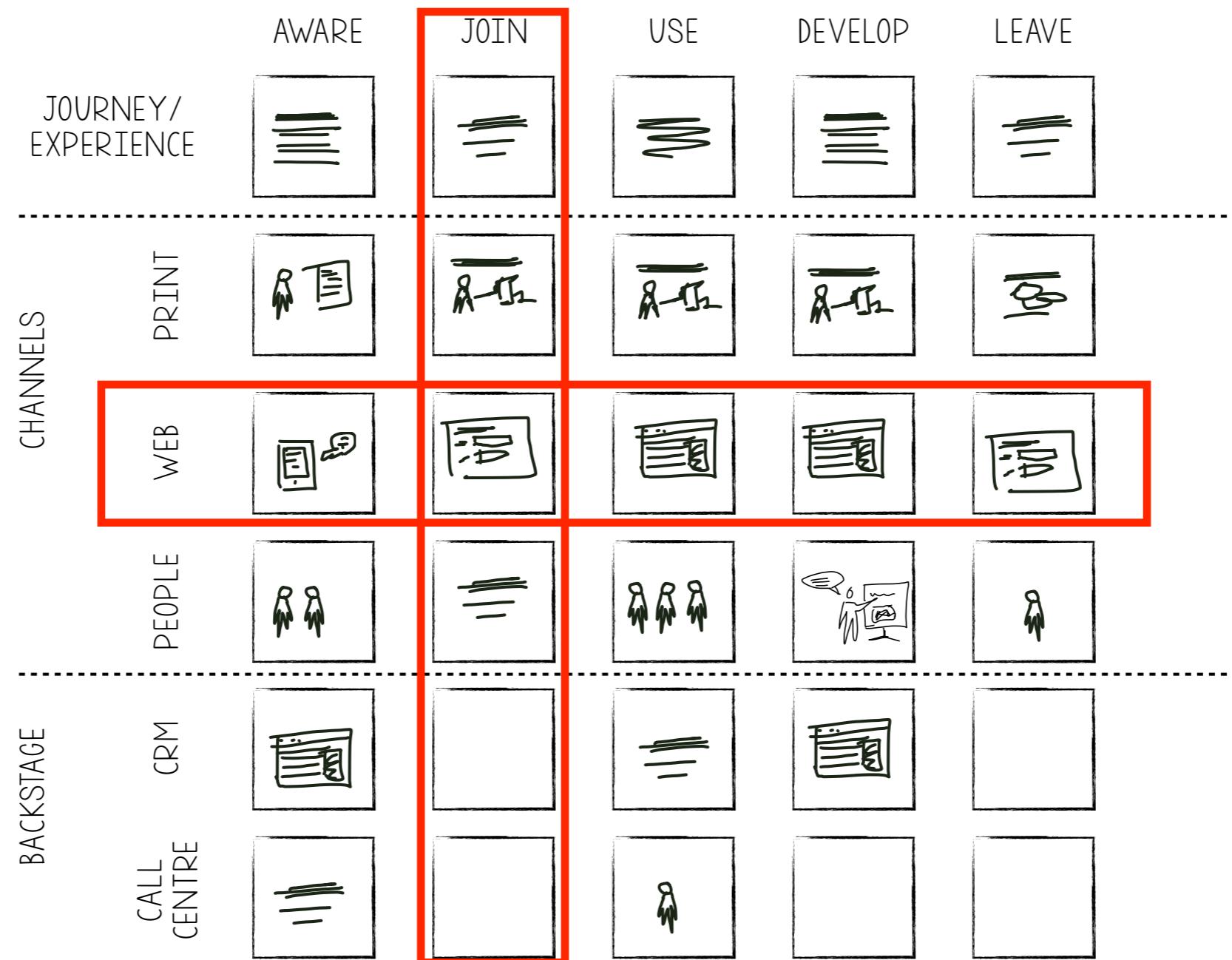
You can't do everything, because you don't have infinite time and budget. So set your priorities and choose to work on the touchpoints that are going to deliver the greatest impact and value. Some things might be mission critical – get them wrong and the service fails completely. Others might be low-hanging fruit – easy fixes that create a great experience. Others might be crucial to the client being able to sell the project internally. Lastly, there are some that you just don't know how they will work until you prototype them – so be sure to do so and test them.

Find the right level



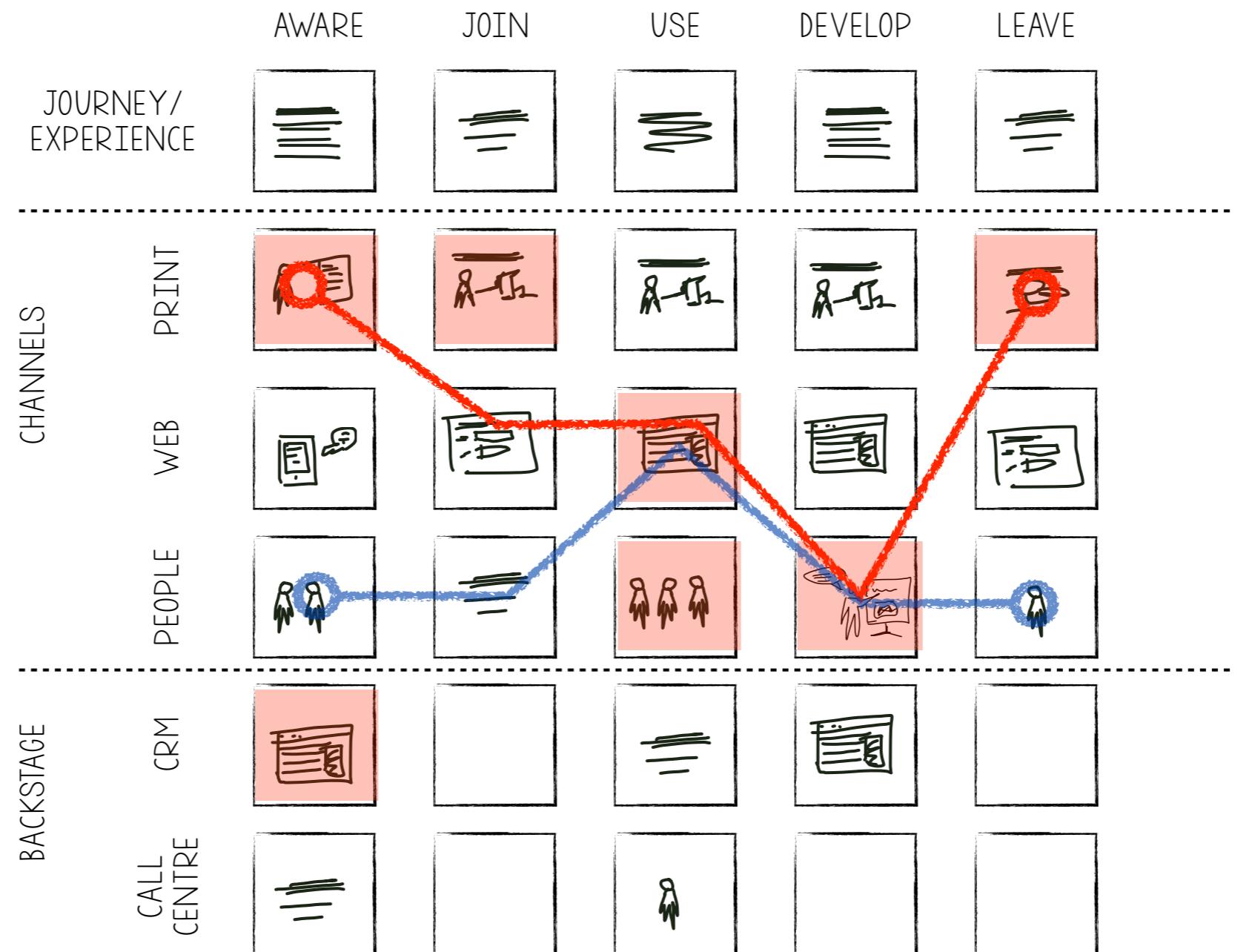
During discussions of services, there is often confusion around what level of granularity is being discussed. It's very easy for people from different departments to argue over the design, because one is thinking at detail level whilst the other is at the meta level. Be clear about the purpose the blueprint is serving—in the end you may need several at different levels of detail or you might just want to break out into customer journey maps and storyboards. Too much detail will make the blueprint useless. It is most powerful as a way of seeing the connected big picture.

Take slices through the blueprint to analyse



You can take “slices” through the blueprint to analyse the project (in real life and mentally). Check for the coherence across channels at any particular moment in the journey. Check for coherence and flow between stages over time along a single channel (as you might already do on a Web or app project as a UXer).

Take journeys through the blueprint



Use either real users from the research or personas to take “journeys” through the blueprint. Here you build up a storyboard from each touchpoint square (e.g. “Jill sees a sign at the bus stop and goes to the website on her smartphone. She decides to go into the store before signing up and talk to someone who gives her a brochure,” etc.).

This way you can map multiple journeys on one blueprint, although you’ll probably want to make some break-out documents to show the details of the storyboards.

Did I mention make it big?

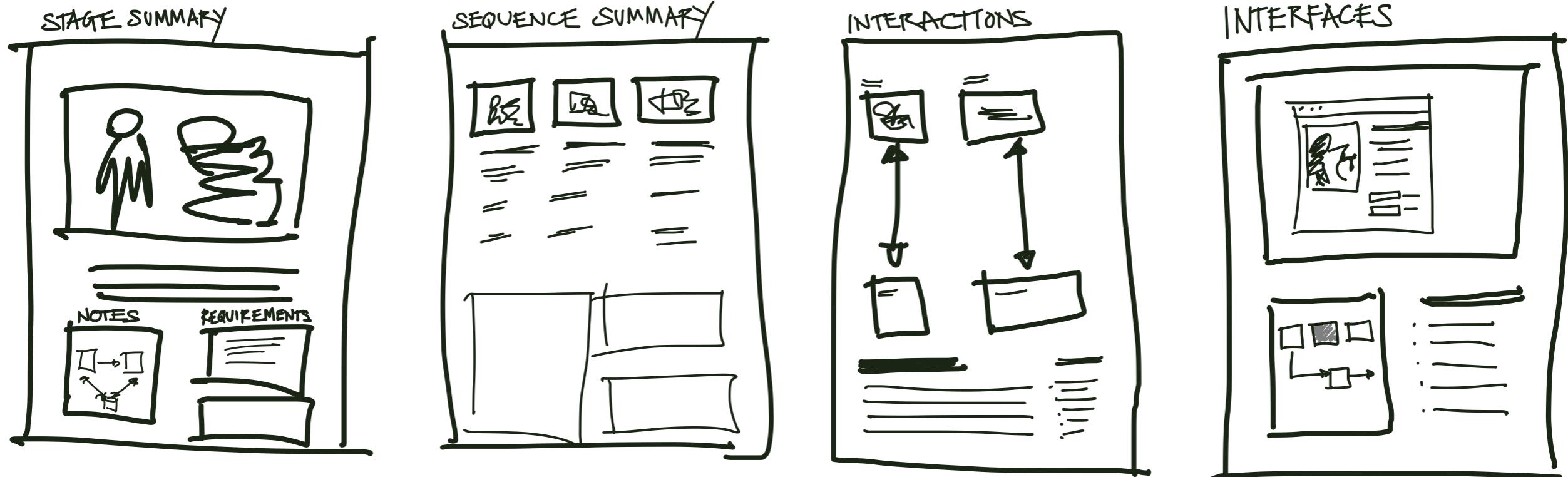
Service Blueprint Template

Own Your Bank Data

Version 1.0

Aware			Join			Use			Develop			Leave		
User	Step	Experience	Face to Face	Print	Web	Mobile	Location	Product	Customer Service	I.T. Department	3rd Party Service			
	Made aware of new services	"This looks great! Finally a way to get a better overview of my spending."	In Branch Staff											
	Sign up to connect personal data service to account	"I trust these people with my financial information"	In Branch Staff											
	After verification, automatically pulls in data.	"That's clever - it automatically pulled in my details so I don't have to."												
	Confirmation e-mail, letter and starter pack sent.	"I understand how this all works so easily."												
	Log-into online banking as usual. Personal data now an option.	"This helps me understand my personal banking better and saves me money"												
	Visualisations available across channels													
	Customer can export their own data in different formats													
	Request for personal data deletion													
	Verify request and give option to export final archive.													
	Receives confirmation of deletion													

Break out detail into other documents



Use breakout documents to show the details. You might have a stage summary (explaining “Join” for example) or you might have a sequence summary or storyboard. Other documents might show the front and backstage interactions in order to brief engineering or other departments. Finally, you will have the usual design specification documents, such as wireframes, mockups, plans, etc. for everyone else to work from.

In the end, you still often create the same documents that you might already be using. The difference is that they all relate back to the service blueprint, which means they are all designed to interlink and be coherent. The ultimate result you are aiming for is that everyone working on delivering the project – from client, managers and staff through to designers, developers, engineers, etc. – are working to the same plan and not in silos. For the customer/user, this should mean they experience a coherent, joined-up and well thought out service.

Tell stories



Storyboards with an image and small bit of text description (or voiceover if you turn it into a small animatic presentation) are still one of the best ways to get across the ideas of the service. It shows touchpoints in context and how they unfold over time.

Summarise Steps/Stages

A1 Start of the Day

Sales agents prepare for the day and understand how well they are doing against targets

X Channel Core Sales
Document version: 1.0
Date: 16.9.10

vodafone

WELCOME, JOHN SMITH

SALE TIE OF THE WEEK

CAMPAIGN OF THE WEEK

TEAM LEAD

Interactions Map

Agent

Customer

Email

Points Dashboard

Leads Monitoring

News

Healthy Competition

Call Center

SMS

Online

Leads management

Agent Interactions

1. Access to personal email
2. Points Dashboard (sales and points)
3. Leads monitoring
4. News
 - Customer Campaigns
 - Tariff updates
 - Internal campaigns
 - External campaigns (from manufacturer)
5. Healthy competition
 - Leader Board
 - Monitoring

Customer Interactions

1. Relevant product/follow up for sales, up-sell and cross-selling.
2. Relevant person for follow-up with customer.
3. Relevant channel for follow-up:
 - Call center
 - Mail
 - SMS

Flags

Individual Performance

Follow Up

Leads Tracking

Systems

Prospect Monitoring

Commissioning

JOURNEY

PoS-A

PoS-B

Home

Call-Center

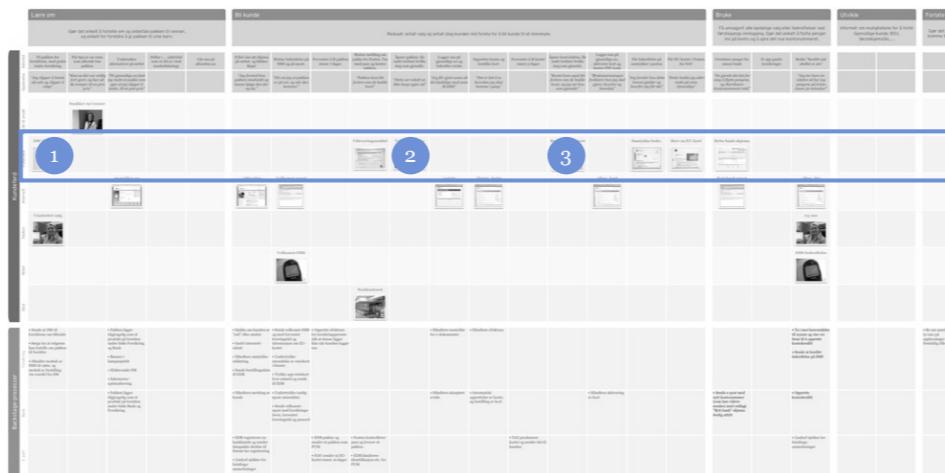
Start of the Day

A step summary is like a detail of a storyboard frame, showing more information about the roles involved, agent and customer interactions, etc.

Design specifications for channels

Service Blueprint for trykksaker

Ungdomspakken



1 DM til foreldre som er gjensidigkunder

BESKRIVELSE

Ungdom som fremdeles har folkeregistrert adresse hos sine foreldre er dekket av deres innboforsikring. Derfor kan eksisterende gjensidigkunder kjøpe Alt-i-orden-pakken til barna sine til en lavere pris. Denne DMen skal kommunisere dette som en fordel, slik at pakken oppleves av foreldrene som noe fint man kan gi barna på veien.

FUNKSJONSKRAV

Sendes ut på sensommeren før studiestart.

Evt. legges ved årlig utsendelse av polisedokumenter eller lignende.

Det må klargjøres for mottak av:

- avklippbar svardele med bestilling av pakken
- SMS til 1868 for å bli opplyst av salgs-

ENHANCED

INNHOLD

- Et brev med tilbud om Alt-i-orden-pakken og avklippbar sverdel
- Ferdigfrakert sværkonylott

Brenet et al.

Brevet skal:

- forklare at Gjensidige har en pakke som inneholder det unge voksne trenger av forsikring- og banktjenester
- forklare at de som gjensidigekunder kan kjøpe denne pakken til lavere pris fordi deres innbofsikring dekker barna, så lenge de ikke melder flytting til folkeregisteret
- kort beskrive fordelene med Gjensidige bank
- kort beskrive forsikringsdekningene som er i pakken
- foreslå at foreldrene kan *gi* denne pakken til sine barn
- gjøre det lett å bestille pakken fra Gjensidige med svardele og ferdig frankert svarkonvolutt
- gjøre det lett å lære med om pakken ved å sende SMS med kodeord **ORDEN** til 1960

FORM

Bør se ut som vanlig kommunikasjon fra Gjensidige.

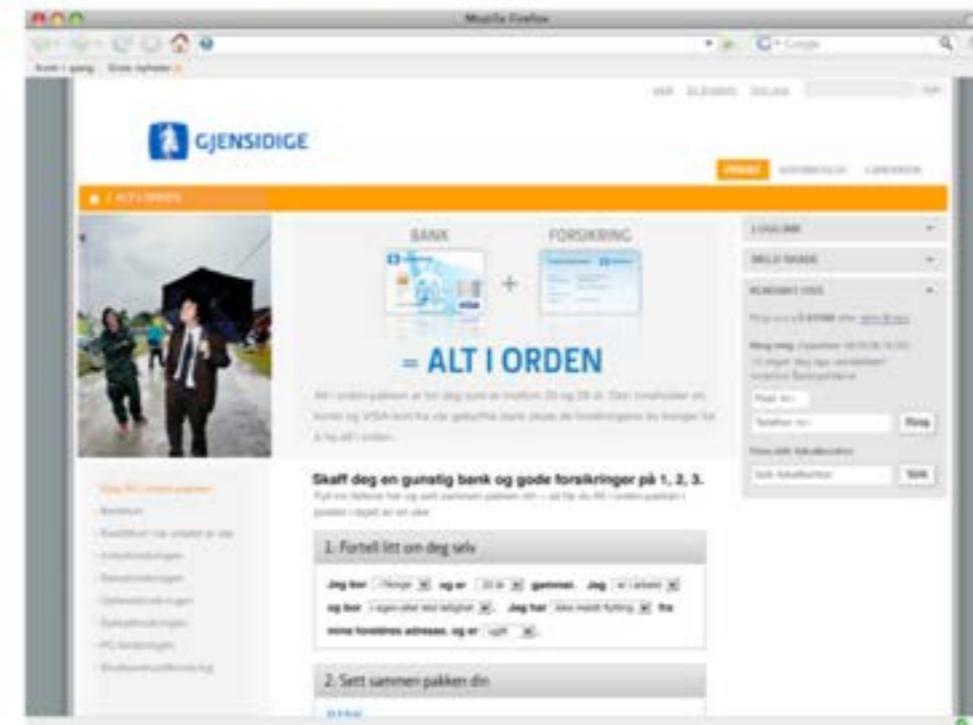
A channel specification gives the design team of that channel the initial brief about what they have to do. This one is in Norwegian (sorry), but you get the idea. Each number on the blueprint matches an explanatory text below. Think of it as a kind of pre-wireframe, er, wireframe.

Design specifications for individual touchpoints

Service Blueprint for internett

Ungdomspakken

2 Produktside og skjema



(se flere skjermbilder: [Flash steg 1](#), [Flash steg 2](#) og [hele siden](#))

BESKRIVELSE

Alt-i-orden er et nytt produkt og trenger en egen side som beskriver pakken og der man kan kjøpe pakken direkte.

FUNKSJONSKRAV

Produktet skal kunne kjøpes på nettet gjennom et skjema på denne siden – ikke gjennom kalkulatorene. Dette skjemaet er en Flash som ligger på selve produktsiden.

Skjema i Flash: ([Steg 1](#), [Steg 2](#))

- skal la kunden velge til og fra de dekninger som er valgfrie
- skal kalkulere og vise prisen dynamisk
- ber være i to steg, og be om kontaktinfo i steg 2 for at skjema ikke skal bli avskrekende langt
- vise priser per år, men oppsummere totalen per måned

Opplysningsene fra skjema skal sendes til EDB.

Ved mottatt bestilling skal EDB:

- registrere ny bankkunde
- sende opplysninger direkte inn i S2000 for å registrere ny forsikringskunde
- pakke reisekort og GO3 i pakken og sende den ut i PUM-konvolutt

Bestillingen fra gjensidige.no må merkes slik at

- EDB kan undertrykke ordinær utsendelse av GO3
- Gjensidige forsikring kan undertrykke utsendelse av ordinært reisekort fra S2000
- Kunden får internettarbeid

Another Norwegian one. This is a specification sheet for a specific touchpoint, in this case the website for a banking and insurance package. This kind of thing should be pretty familiar to UXers. But don't get document obsessive. If you're used to Lean/Agile/Scrum, you'll know it's usually better to get to a rough prototype first, then everyone knows what they're talking about.

Measure across different channels, over time



The service blueprint is primarily a tool to help the project team design and think through the complexity of the service in its conception and implementation. But it also gives you a useful breakdown of the individual touchpoints of the service, which means you can measure them *before* and *after* your intervention as service designers. In some cases this will be monetary or quantitative data, such as profits, savings or numbers of new customers, etc. But it can also include qualitative data from customer feedback, more research and observation, etc.

Some individual touchpoint elements might cost more, but they might have a knock-on positive effect later on in the customer journey. Unless you map your measurements in this connected way, you run the risk of narrow-minded bean-counters striving for efficiency pulling apart your crafted service experience.

What is crucial here is to capture your baseline data before you launch or run a pilot. Without this *before* data, you can't prove your case for the wonderful effects of *after*. You can be sure that everyone else will try to claim credit for it if it is a success and blame someone else if it isn't.

Experience prototype and pilot



live|work experience prototyping a re-design of Oslo's public transport services.

Experience prototyping is crucial. Services are made of moving parts – including other people – that customers and staff interact with over time. Things like wait times, transitions, scale, etc. are very hard to gauge the potential success or failure of until you see it in action.

As always, start low-fi and gradually ramp up to a pilot project. Given that services often involve large amounts of infrastructure (e.g., public transport, telecommunications, healthcare), running a pilot project is a way to iron out the bugs before launching. As UXers, you're probably used to this idea online, but you would be surprised how many organisations roll out a huge project without doing this.

What to look for while developing and prototyping

- 1. Do people understand the service—what the new service is or does?**
- 2. Do people see the value of the service in their life?**
- 3. Do people understand how to use it?**
- 4. Which touchpoints are central to providing the service?**
- 5. Are the visual elements of the service working?**
- 6. Does the language and terminology work?**
- 7. Which ideas do the experience prototype testers have for improvement?**

Concentrate on 1-4 for today

- 1. Do people understand the service—what the new service is or does?**
- 2. Do people see the value of the service in their life?**
- 3. Do people understand how to use it?**
- 4. Which touchpoints are central to providing the service?**
- 5. Are the visual elements of the service working?**
- 6. Does the language and terminology work?**
- 7. Which ideas do the experience prototype testers have for improvement?**

Some questions to kick-start things

- **What kind of experience should your service be? Start there and focus on a couple of key touchpoints to begin with. Then expand outwards.**
- **What are the highs and lows of air travel? Where are the cracks between the different elements of the services?**
- **How could transitions between stages and across channels be improved or reinvented?**
- **What elements are considered the norm but could be reimagined?**
- **What kind of experiences, services or paradigms could you borrow from another sector and apply here (e.g., what would be the IKEA or the Airbnb of air travel?)**