



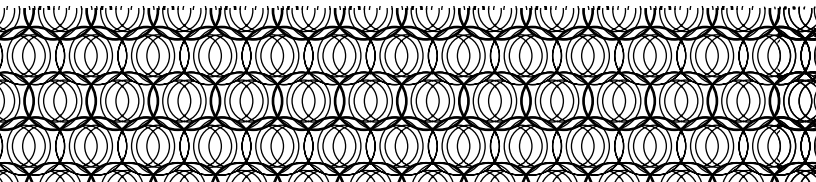
SERVICE DESIGN

H E U R I S T I C S

A Practical Field Guide

This workbook belongs to

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USABILITY MATTERS

SERVICE DESIGN

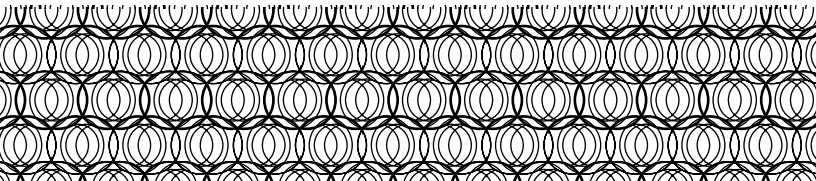
HEURISTICS

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workbook

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Shannah Segal..... Review and subject matter expertise
Principal, Usability Matters

Linnea Vizard..... Content and subject matter expertise
Service Designer, Usability Matters

Simon Coyle..... Art direction and layout
Art Director, Usability Matters


Adie Margineanu..... Graphic design and layout
User Experience Designer, Usability Matters


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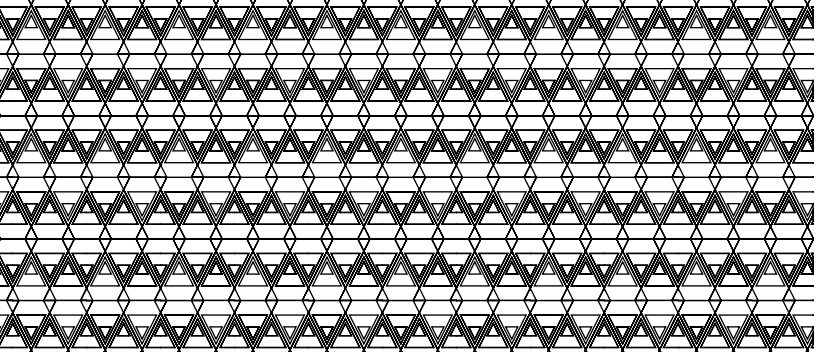
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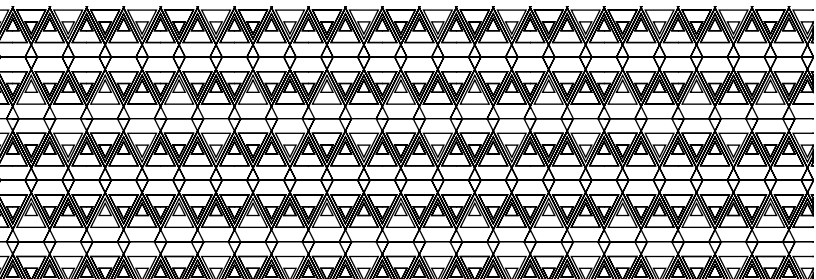
HOW TO USE THIS BOOK

This book is intended to provide a framework for applying the Service Design Heuristics to your investigations of the services that make up the world around you, as well as those you may have a hand in designing!

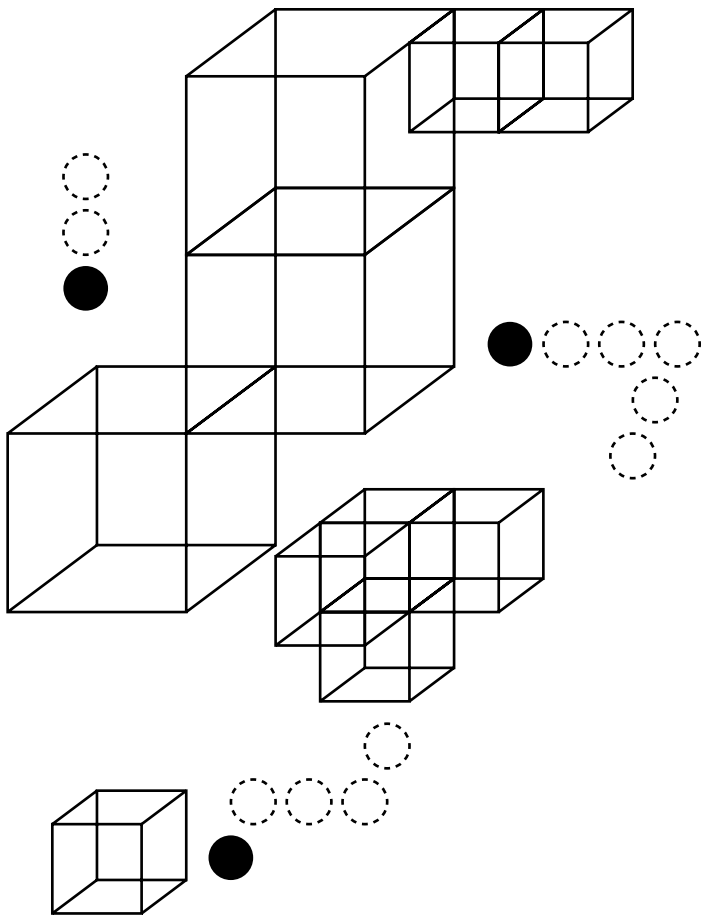
- A Service Design Heuristics help to **evaluate** and **design valuable services**. They are intended as rules of thumb rather than specific directive guidelines. They can be used in both generative and evaluative ways – as a set of considerations throughout the research and design phases of a project or as an assessment tool to evaluate an existing service.
- B The heuristics can be viewed through many lenses, reflecting the complexity, nuance and multi-layered reality of designing and producing services. A heuristic can apply to a single interaction as well as to the overall service eco-system. Similarly, the heuristics could be applied to a single moment in time and to an actor's entire long-term relationship with a service.
- C Service Design heuristics take a holistic back-and front-stage view, encompassing all actors in the service, be they customers, employees, third-party stakeholders, or partners. This conceptual approach recognizes that services are co-produced, and that human interaction is a key component of many, if not all, services.

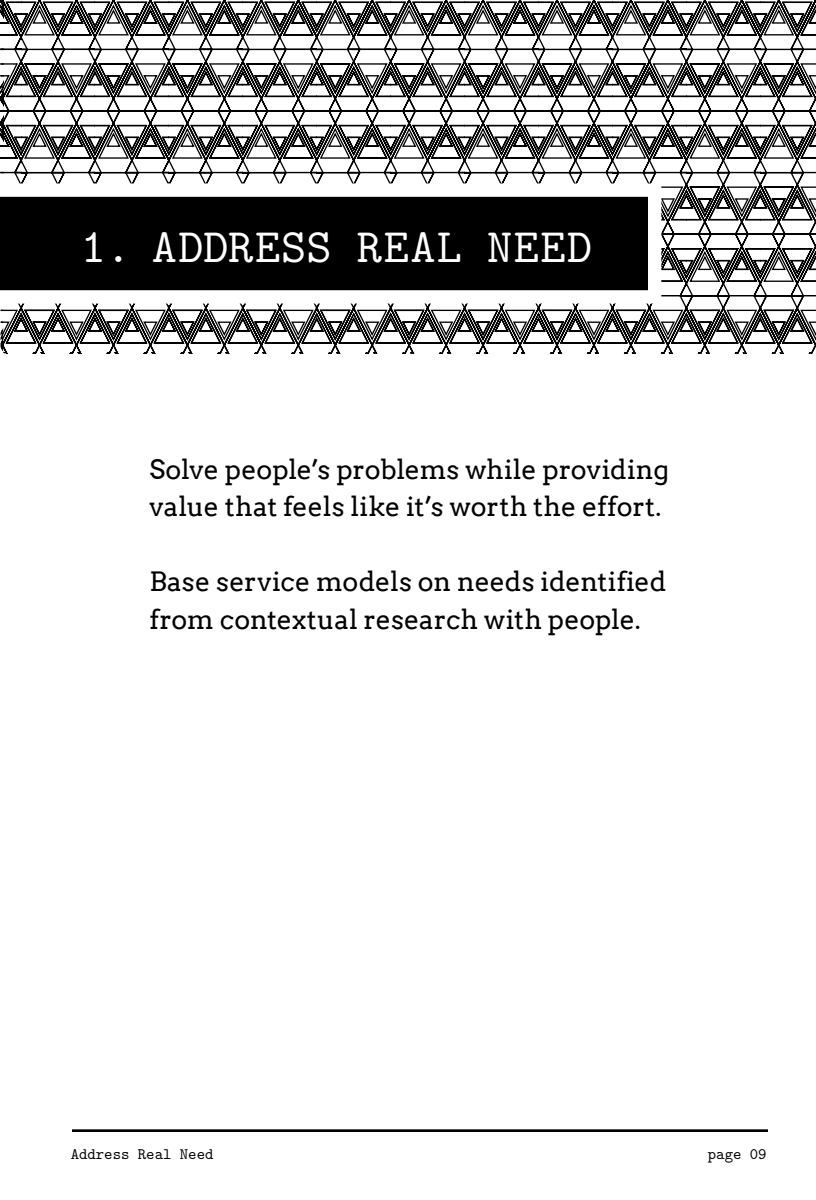


1.









1. ADDRESS REAL NEED

Solve people's problems while providing value that feels like it's worth the effort.

Base service models on needs identified from contextual research with people.

ORGANIZATION

e.g. Hertz

SERVICE TYPE

e.g. car rental

A

What real needs does this service address really well?

1. _____

2. _____

3. _____

notes

.....

.....

.....

.....

.....

.....

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B

How could these needs be served better?

1. _____

2. _____

3. _____

notes

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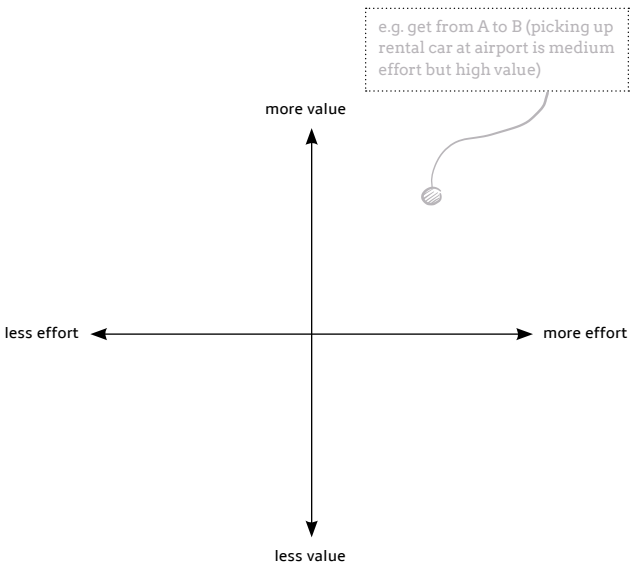
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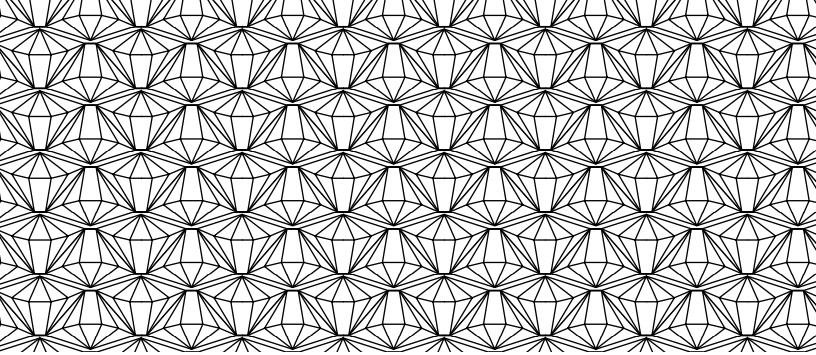
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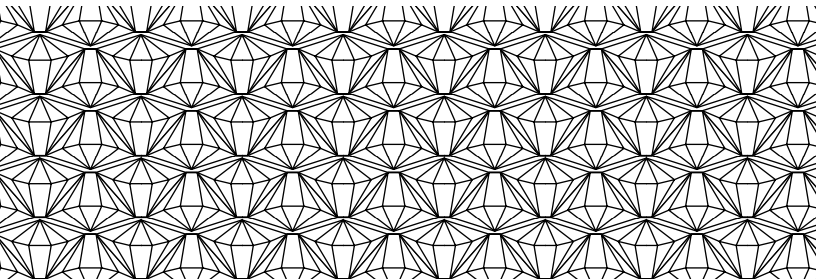
C

Plot the three needs this service addresses on the effort/
value graph.



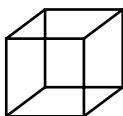
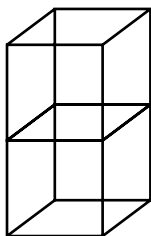
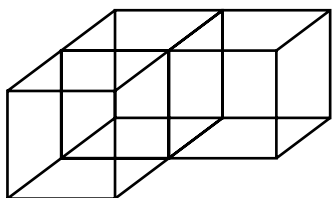
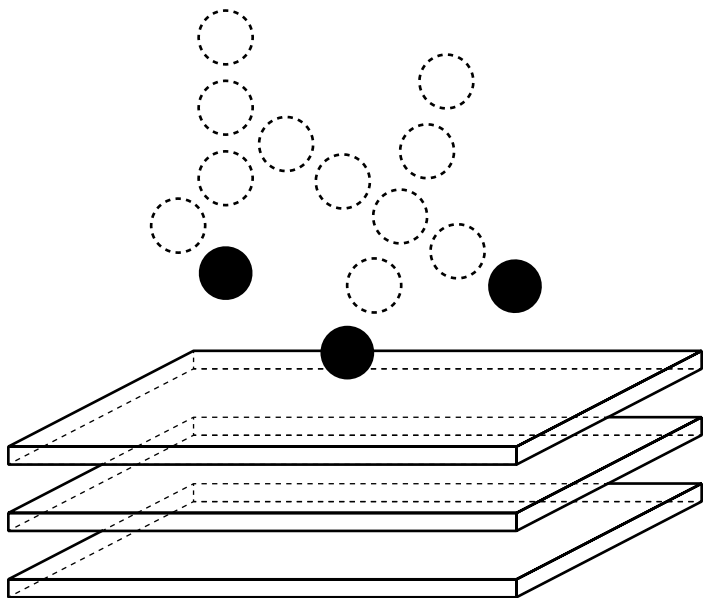


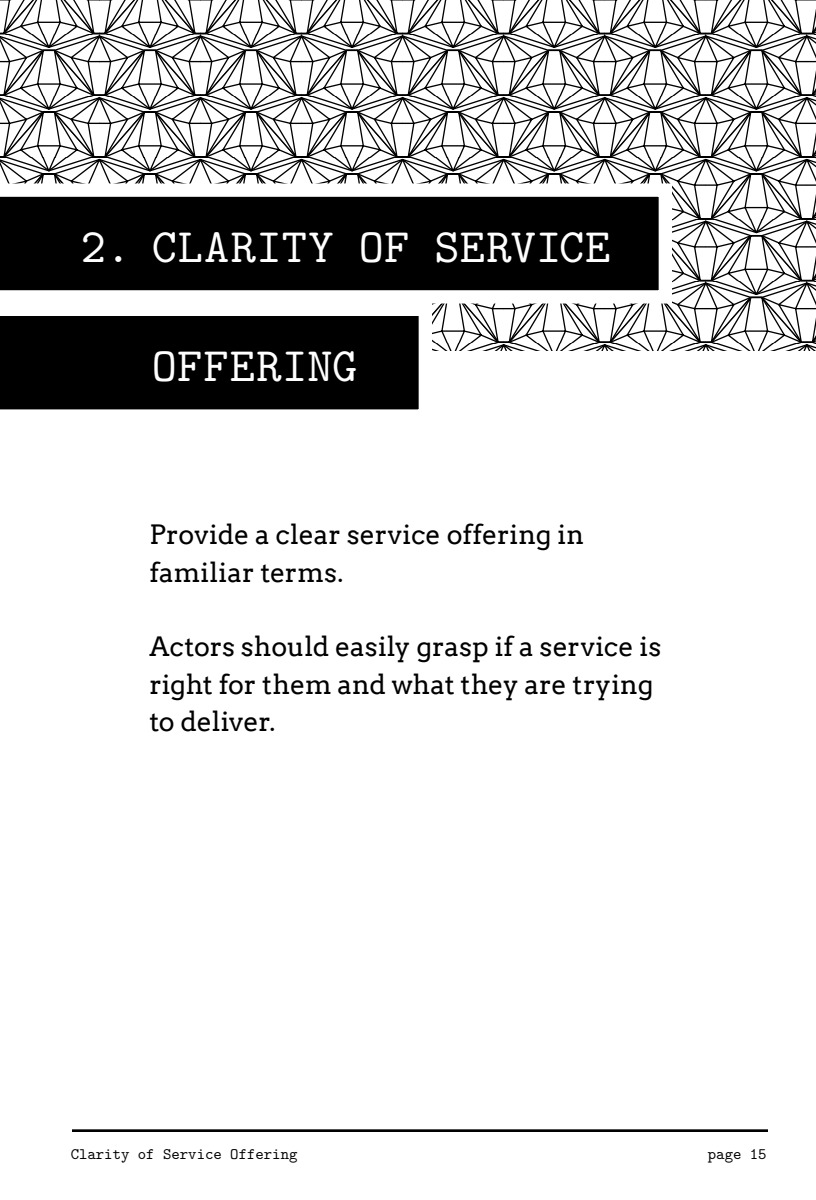
2.



CLARITY







2. CLARITY OF SERVICE

OFFERING

Provide a clear service offering in familiar terms.

Actors should easily grasp if a service is right for them and what they are trying to deliver.

ORGANIZATION

SERVICE TYPE

A

A clear service offering can be captured in a single sentence.
Fill in the blanks.

This service is for _____

who need _____

when _____ .

B

What are three specific ways the service communicates who it's for? How clear is each one?

1. _____

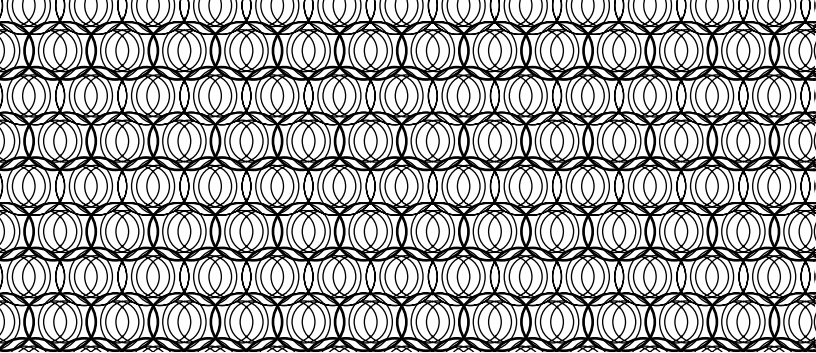
unclear ←————→ very clear

2. _____

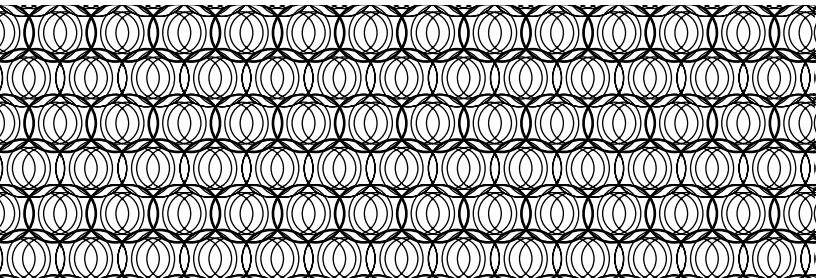
unclear ←————→ very clear

3. _____

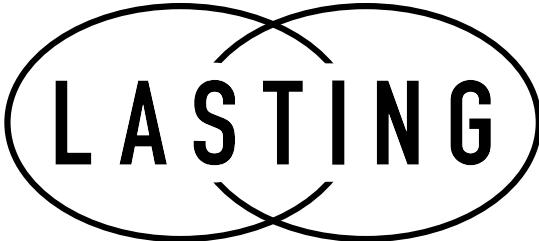
unclear ←————→ very clear



3.



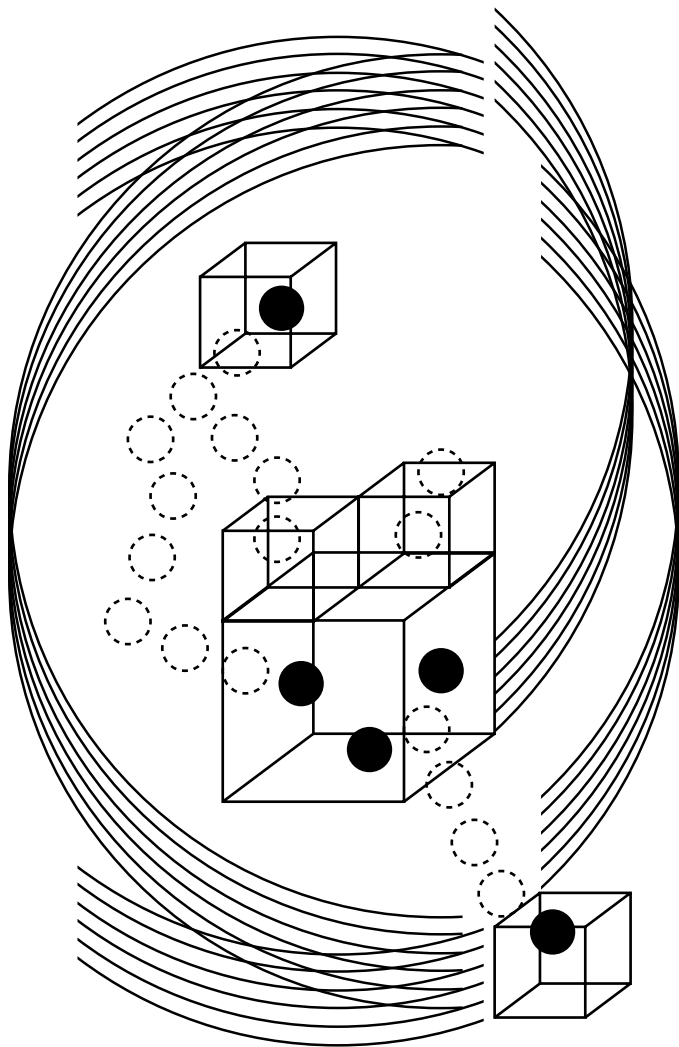
BUILD



LASTING

RELATIONSHIPS

The central graphic consists of two overlapping ovals. The word 'LASTING' is written in a bold, sans-serif font across the intersection of the two ovals. Above the top oval is the word 'BUILD' with a short horizontal line underneath it. Below the bottom oval is the word 'RELATIONSHIPS' with a short horizontal line above it.





3. BUILD LASTING

RELATIONSHIPS

The service system should support appropriate interactions, allow for flexibility of use, and foster ongoing relationships.

The right level of engagement supports an evolving service experience.

ORGANIZATION

SERVICE TYPE

A

What is the tone of the service relationship?

cold ←————→ hot

serious ←————→ playful

Are there interactions where the tone isn't appropriate?

.....

.....

.....

.....

.....

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.....

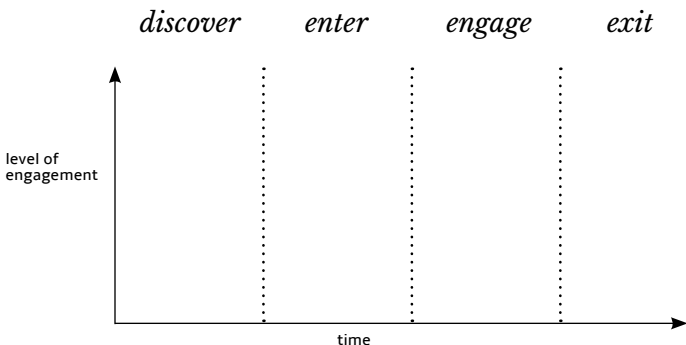
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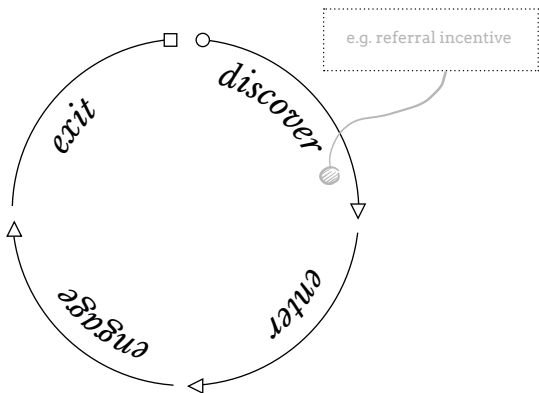
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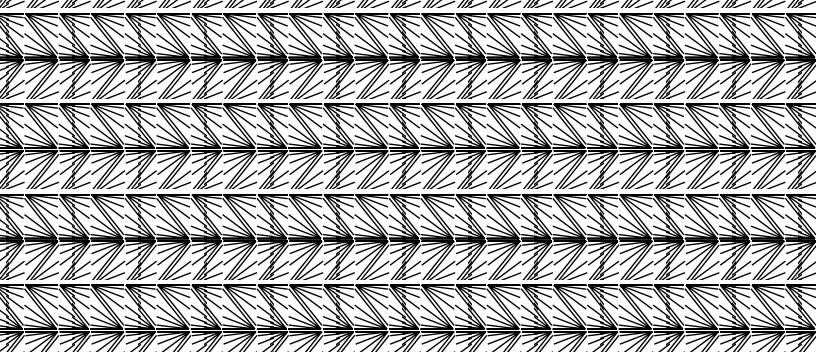
Graph the level of engagement throughout the service cycle.



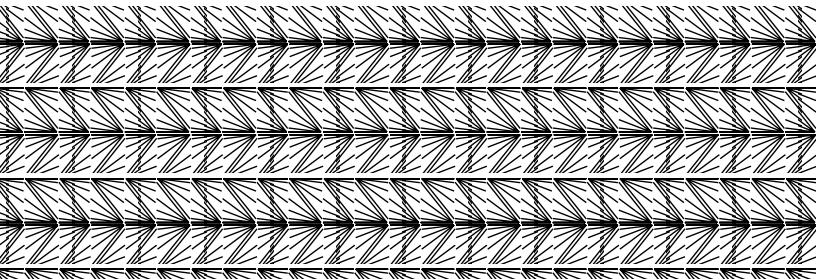
C

Plot opportunities to build better relationships during the service cycle.

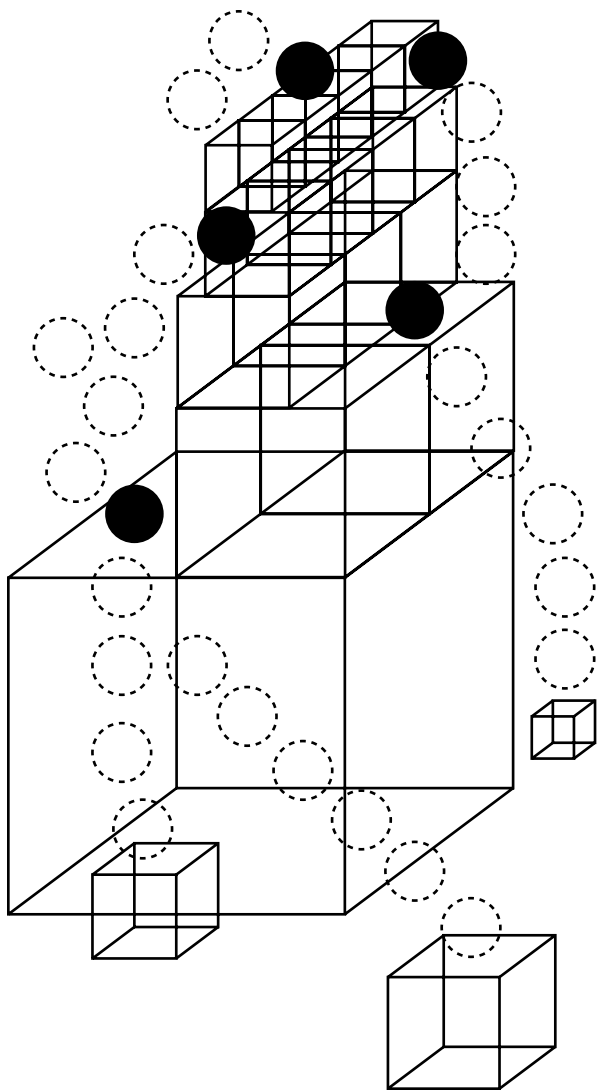




4.









4. LEVERAGE EXISTING

RESOURCES

Consider the whole system and what existing parts could be used to better deliver the service.

Find opportunities to augment, repurpose, or redeploy resources.

ORGANIZATION

SERVICE TYPE

A

Describe existing system resources.

staff

space

amenities

knowledge

partners

B

Think of alternative uses for three of the resources above.

resource

uses

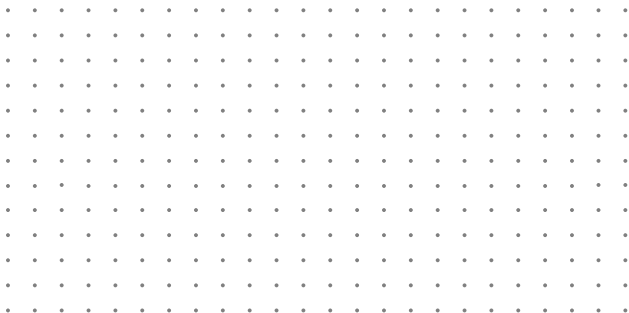
1. _____
2. _____
3. _____

1. _____
2. _____
3. _____

1. _____
2. _____
3. _____

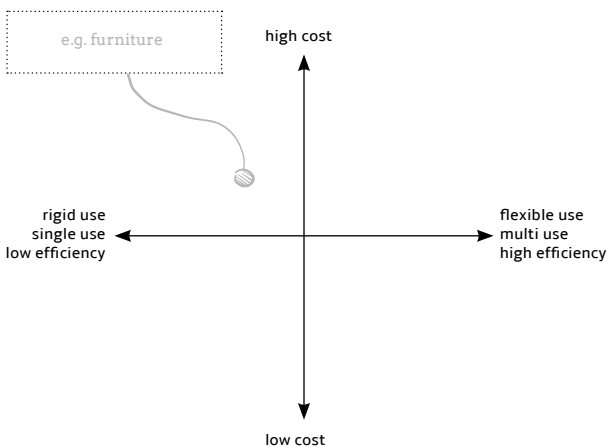
C

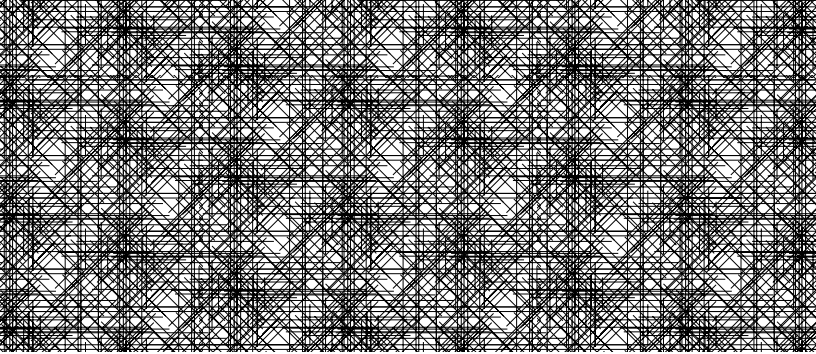
Brainstorm opportunities for resource-sharing partnerships.



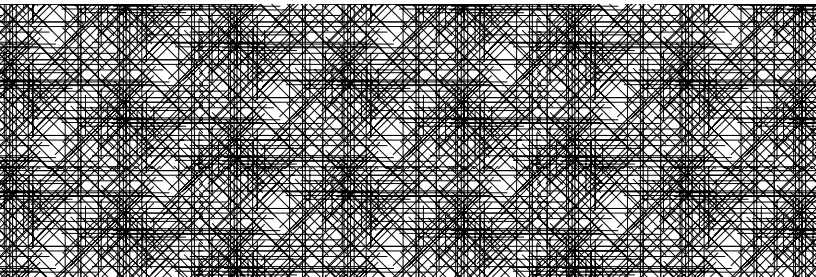
D

Plot available resources.

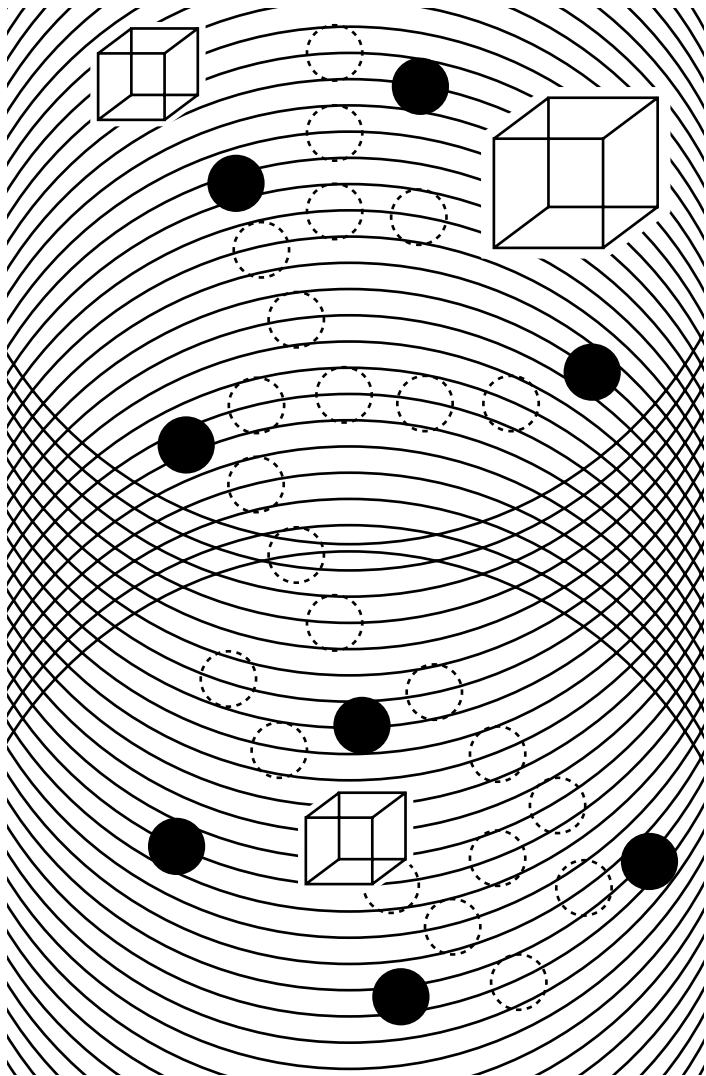





5.









5. ACTOR AUTONOMY

AND FREEDOM

The service ecosystem should fit around the habits of those involved.

Do not expect people to adapt their life or work styles to suit the service model.

ORGANIZATION

SERVICE TYPE

A

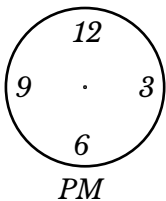
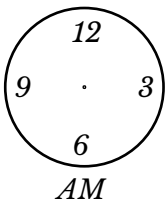
Identify a service user:

B

What does 's day look like?

	morning	noon	night
location			
mood			
tasks			
activity			
need			
motivator			

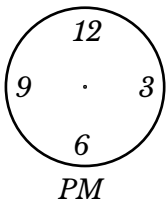
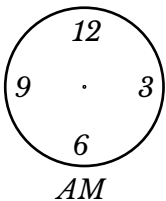
C When is the service available?



exceptions

.....
.....
.....
.....
.....

D When does need the service?

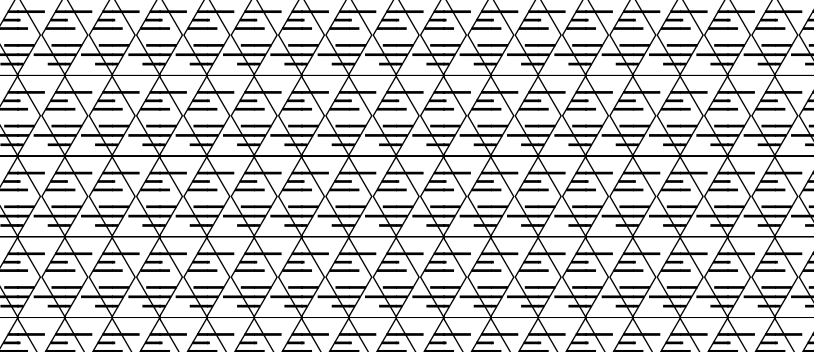


exceptions

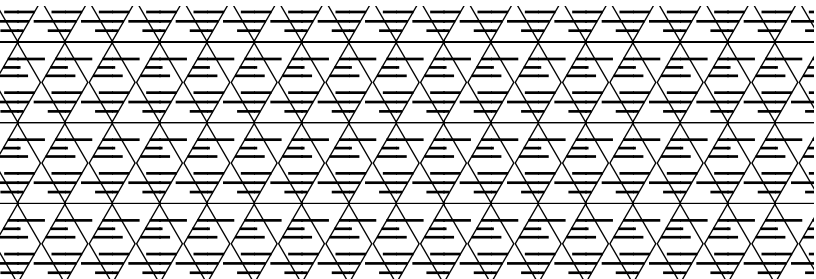
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E How well do C and D match?

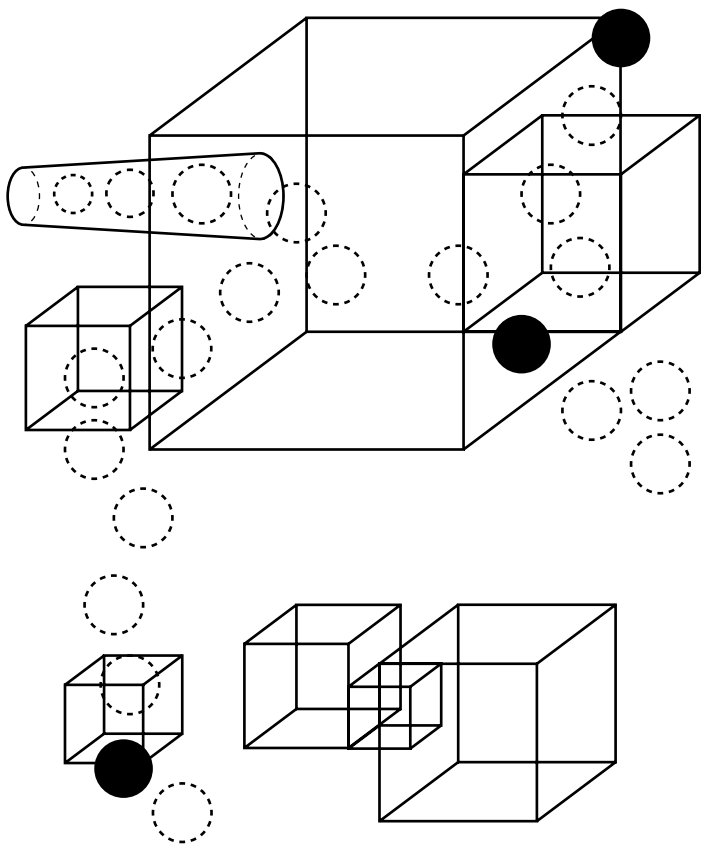
more different ←————→ more similar



6.



GRACEFUL ENTRY & EXIT





6. GRACEFUL ENTRY

AND EXIT

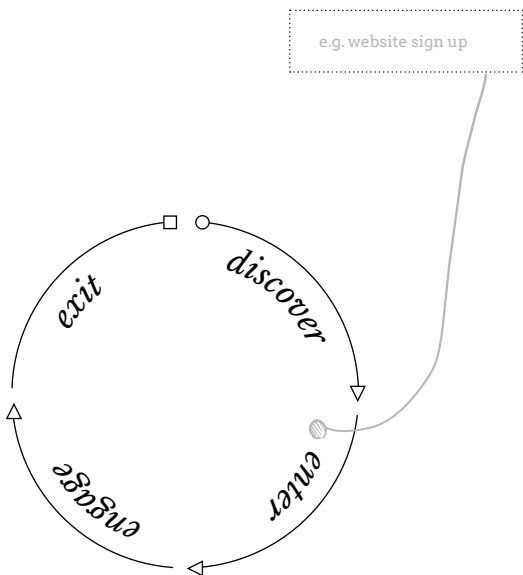
Provide flexible, natural entry and exit points to and from the service.

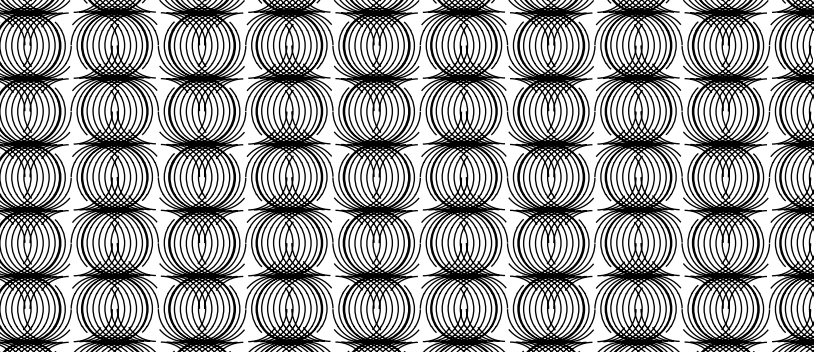
Consider when it is appropriate for actors to jump in, or to achieve closure.

ORGANIZATION

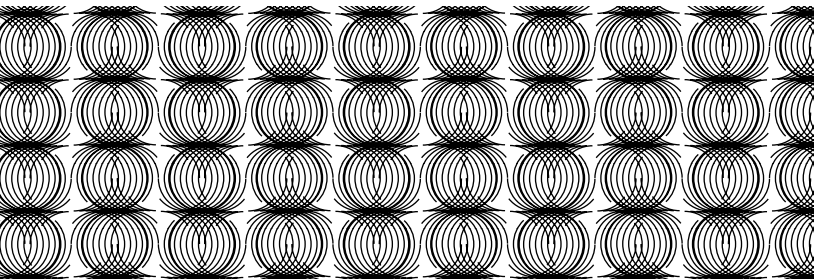
SERVICE TYPE

- A Identify existing service entry and exit points.



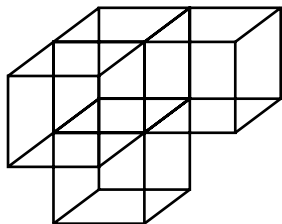
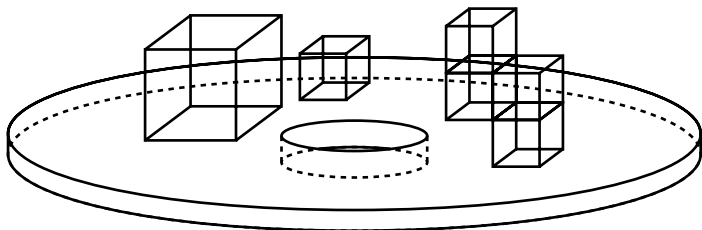
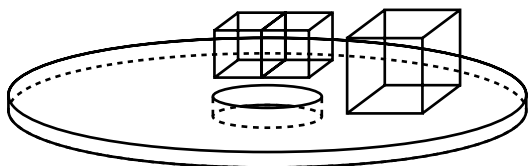
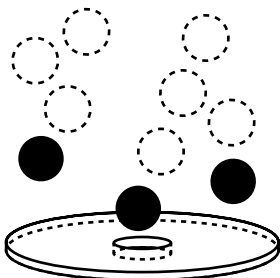


7.



SET

EXPECTATIONS





7. SET EXPECTATIONS

Let actors know succinctly what to expect.

Assist understanding of where they are in the system through the design of environments and information.

ORGANIZATION

SERVICE TYPE

A

Identify and briefly explain three key service expectations.

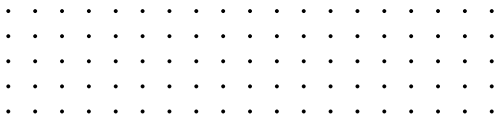
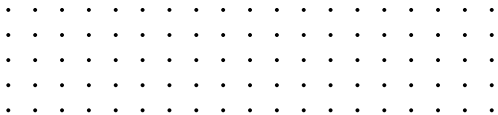
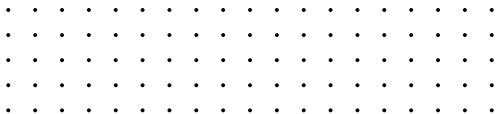
1. _____

2. _____

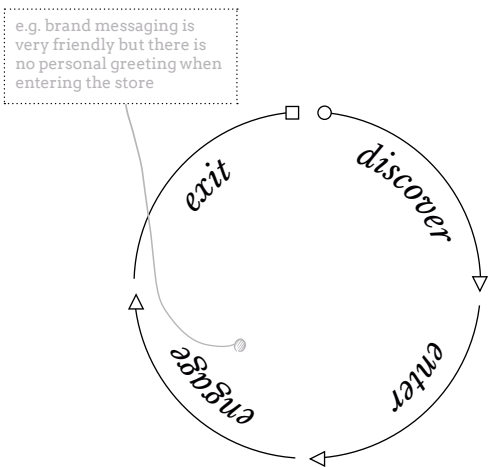
3. _____

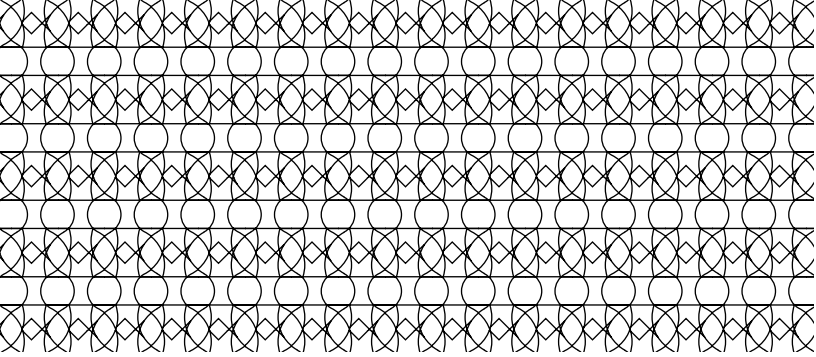
B

Sketch and describe wayfinding touchpoints (might include instructions, signage, process maps, or location maps).

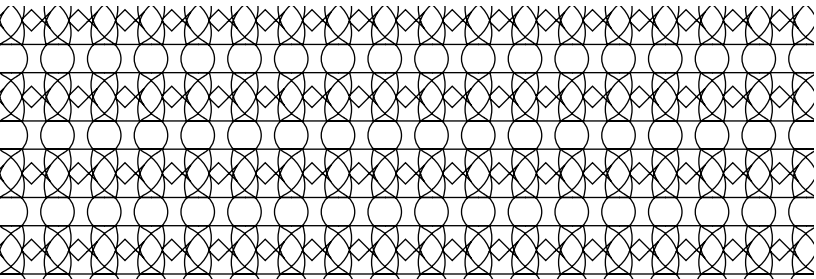


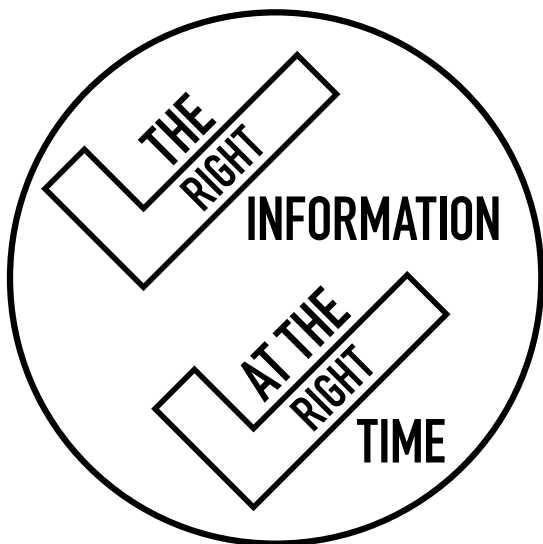
- C Note any disparities between expectations and actual service delivery throughout different stages of engagement.

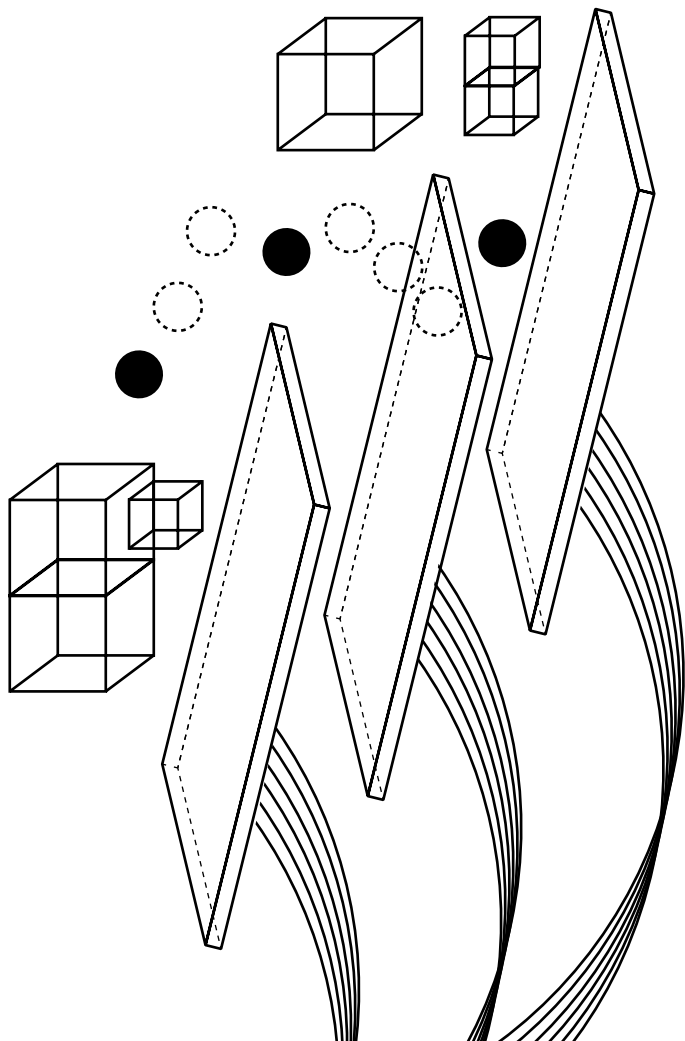


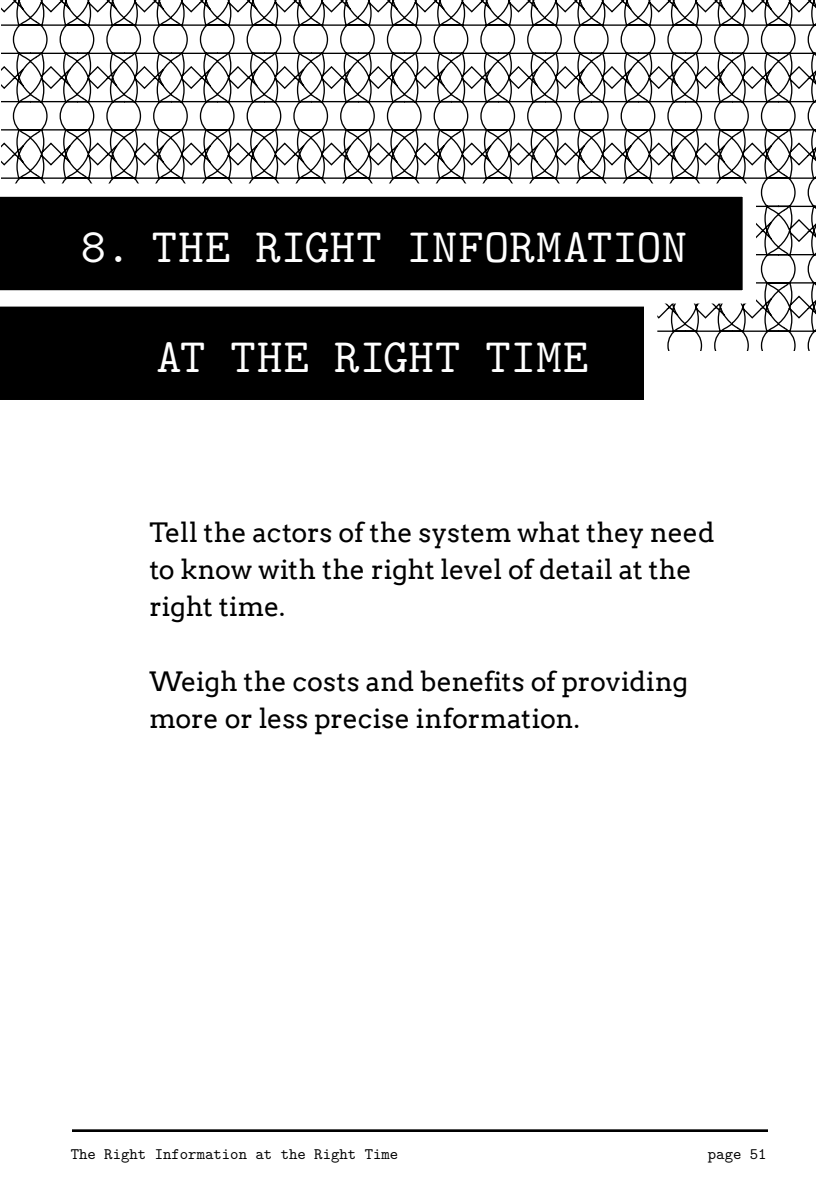


8.









8. THE RIGHT INFORMATION

AT THE RIGHT TIME

Tell the actors of the system what they need to know with the right level of detail at the right time.

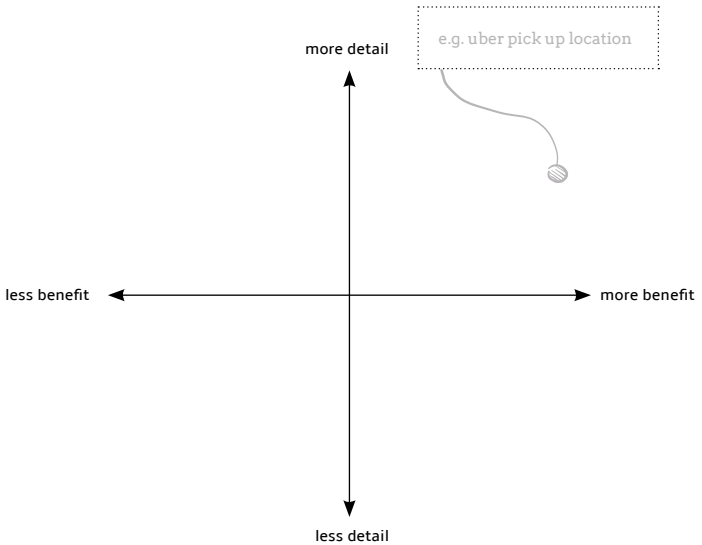
Weigh the costs and benefits of providing more or less precise information.

ORGANIZATION

SERVICE TYPE

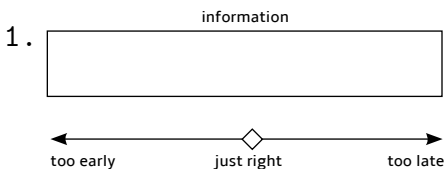
A

Plot level of detail vs. benefit of key information within the service system.



B

Identify specific information provided by this service and indicate when it is delivered within the service cycle. Evaluate if the timing of this information delivery is appropriate.

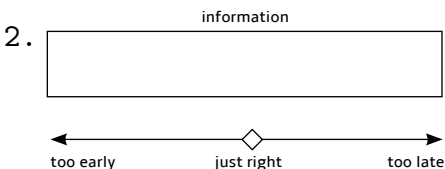


discover

enter

engage

exit

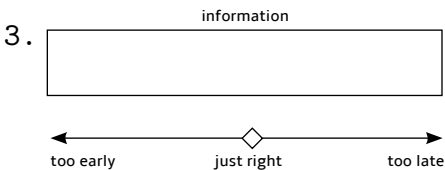


discover

enter

engage

exit

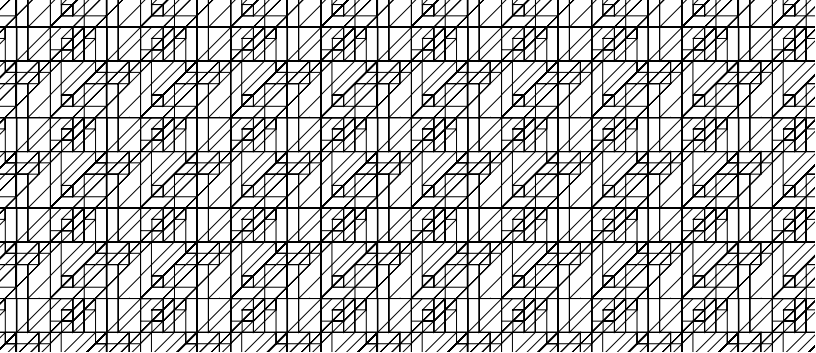


discover

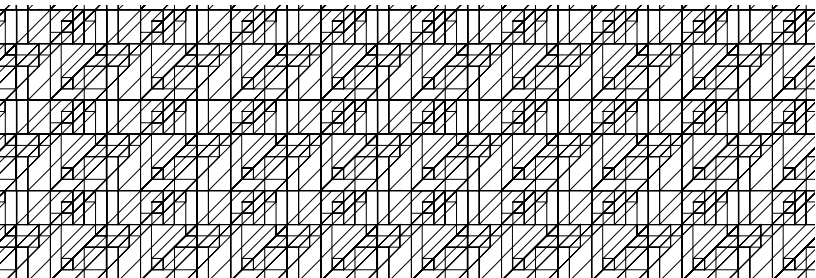
enter

engage

exit

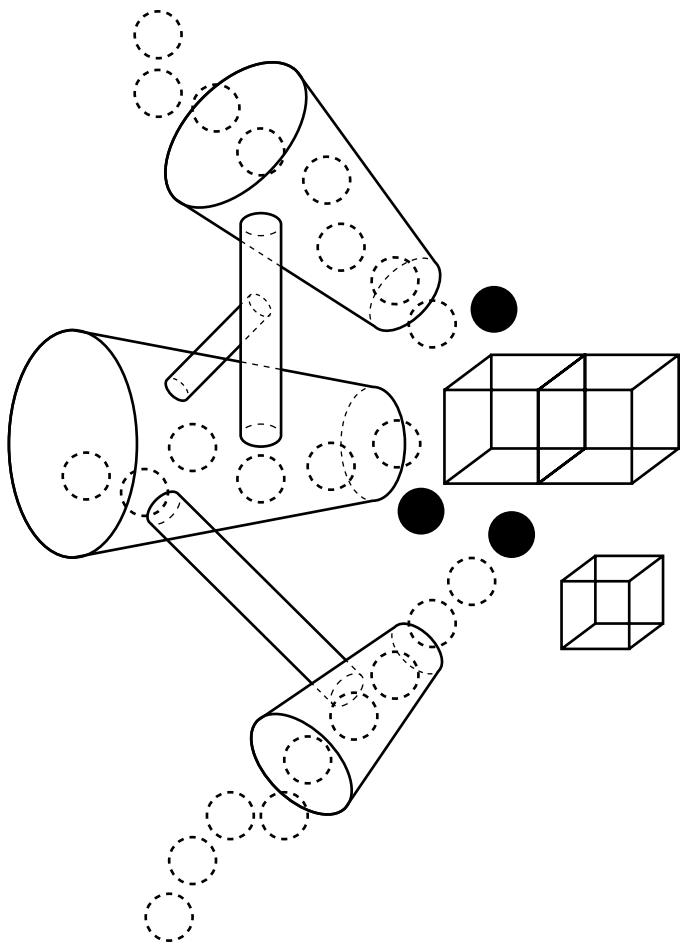


9.





CONSISTENCY
ACROSS CHANNELS
AT ANY SCALE





9. CONSISTENCY ACROSS

CHANNELS AT ANY SCALE

Continuity of brand, experience, and information should exist across the entire service system.

Actors should be able to seamlessly move across channels.

ORGANIZATION

SERVICE TYPE

A

How well does the channel embody the brand.

very well



mail

in store

website

.....

B

Identify differences or gaps in the service experience between two different channels.

+

e.g. different offers online than in-store

.....
.....
.....

+

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.....
.....

+

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.....
.....

+

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.....
.....

C

What does the brand **feel** like in each channel?
Write or sketch.

mail

e.g. beauty sample sent in the mail - service feels old-school,
feminine, personal

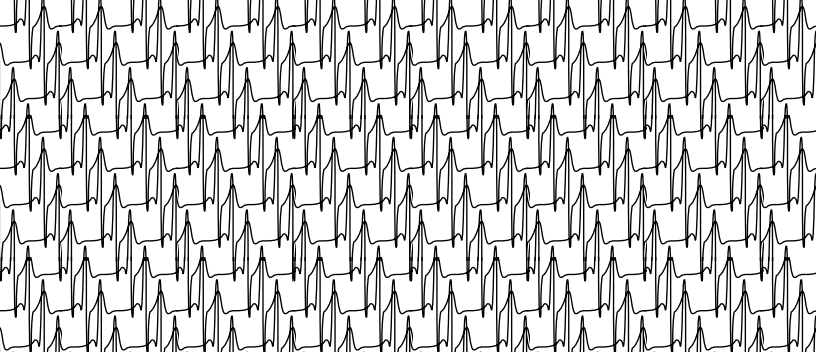
website

in store

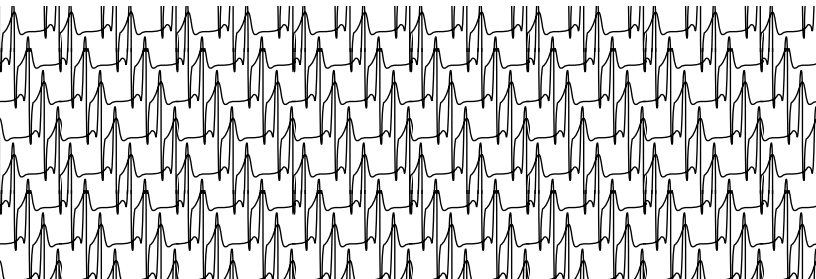
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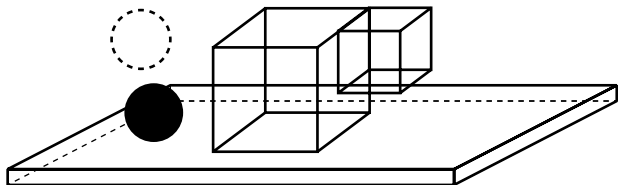
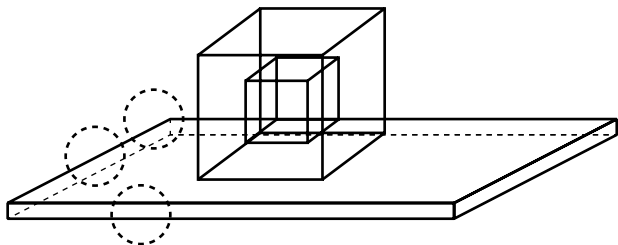
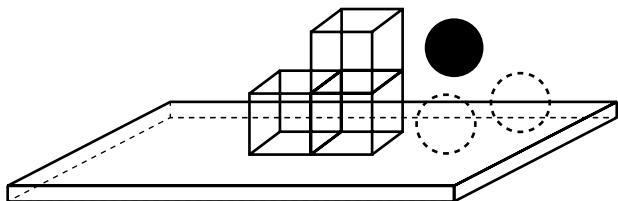
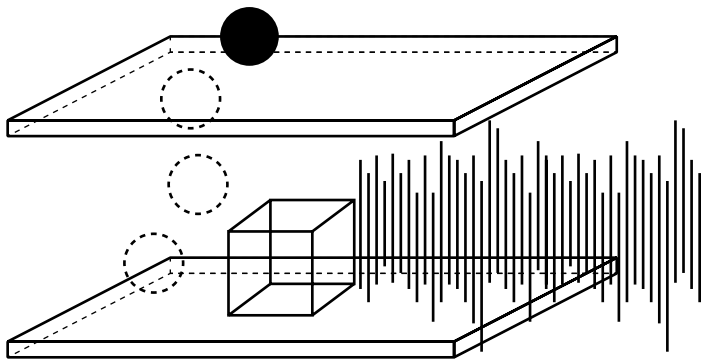


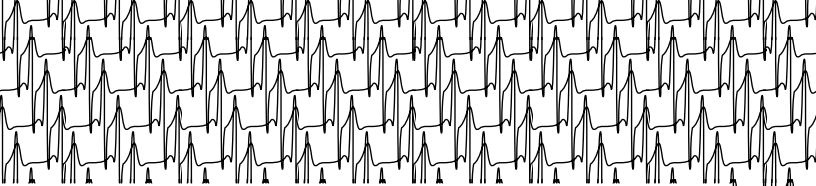
10.





APPROPRIATE
PACE & RHYTHM
OF DELIVERY





10. APPROPRIATE PACE AND

RHYTHM OF DELIVERY

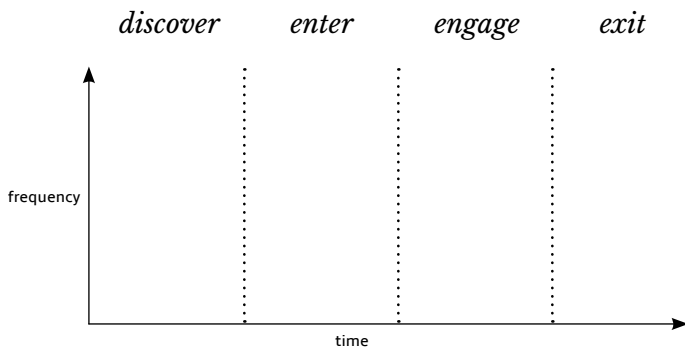
All actors should experience and provide the service at a suitable and sustainable pace.

ORGANIZATION

SERVICE TYPE

A

Graph the frequency of interaction throughout the service cycle.



B

Plot how appropriate the pace of service delivery is during each stage of the service cycle.

1. *Discover* ←—————◇————→
too slow just right / medium too fast

2. *Enter* ←—————◇————→
too slow just right / medium too fast

3. *Engage* ←—————◇————→
too slow just right / medium too fast

4. *Exit* ←—————◇————→
too slow just right / medium too fast

A.

—
USABILITY MATTERS

SERVICE DESIGN
H E U R I S T I C S

.....
in the wild
.....

When you observe a service in the wild that effectively utilizes a service design heuristic, take note below, and add the corresponding sticker. Collect them all!



organization

service type

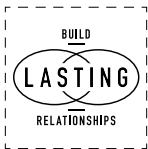
observation



organization

service type

observation



organization

service type

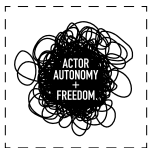
observation



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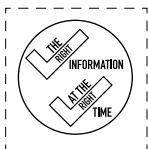
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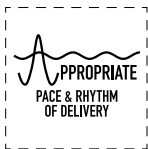
observation



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When you observe a service in the wild that effectively utilizes a service design heuristic, take note below, and add the corresponding sticker. Collect them all!



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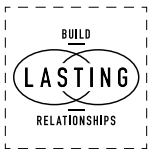
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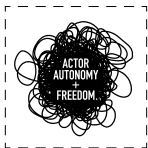
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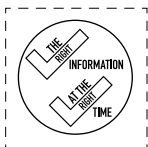
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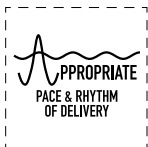
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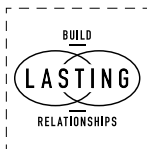
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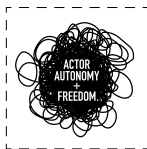
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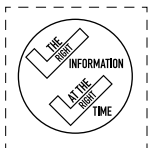
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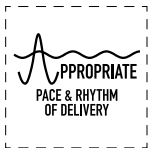
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B.

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USABILITY MATTERS

SERVICE DESIGN

HEURISTICS

.....
glossary
.....

Actor

Any person involved in the creation, delivery, support, or use of a service.

e.g. a call center agent, an end user, or a VP of marketing

Artefacts

Physical service touchpoints.

e.g. the London Underground map

Channel

A medium for communication or delivery. Most services use more than one channel.

e.g. phone, email, direct mail, website, store

Contextual Research

Investigation that takes place in the real-world environment of the subject being explored.

e.g. interviewing and observing a cashier while on the job in a store

Entry Points

Instances of access to a service, where actors are able to join the service as customers, providers, or stakeholders.

e.g. a sign-up form on a website

Exit Points

Instances where actors leave the service as customers, providers, or stakeholders.

e.g. an unsubscribe link in an email newsletter

Heuristics

Best practices, principles, or rules of thumb.

e.g. "The system should always keep users informed about what is going on, through appropriate feedback within reasonable time," is one of Nielsen's 10 Usability Heuristics

Journey Map

A visual representation (including photographs, quotes, and commentary) of a particular actor's experience with a service. Often time-based showing multiple channels.

e.g. document providing a narrative overview of an actor's steps and experience of getting a driver's license

Needs

A necessary and/or desired function or condition. Needs range from high-level to granular and from tactical to emotional.

e.g. requirement to be certified as legally able to drive, to be able to get from A to B

Persona

A representation of a user group with shared needs and characteristics. Personas are the distillation of primary research with people.

e.g. PR Manager "Jane Doe" might be one of an email marketing company's personas

Resources

Assets of many types including physical, knowledge, technological, monetary, and material, which are used to deliver a service.

e.g. seed funding for a new venture

Scale

A level or size of something in relationship to something else. Service design considers micro and macro scales, zooming in on particular touchpoints or interactions, and zooming out to holistic overviews of an experience.

e.g. a multinational brand provides service at a global scale

Service

An exchange of value, tangible and intangible. Services are often things that people use but do not own.

e.g. a system that facilitates car sharing

Service Cycle

The process by which actors engage with a service. A service cycle visualization considers all the phases in which an actor becomes engaged with a service. A service cycle differs from a journey map in that it takes the perspective of the entire system rather than that of a particular actor.

e.g. diagram showing the cycle of learning about a service, entering it, using it, and exiting or staying engaged

Service Delivery

The provision of a service.

e.g. the operations that position a car rental company to provide the service of car hire

Service Offering

The value that a service provides, or the need it serves.

e.g. bike sharing offers the service of access to bikes without owning one

Service System

The broader ecology of relationships, interactions, and contexts of a service.

e.g. all of the components, channels, resources, and touchpoints, internal and external, that facilitate the delivering of mail

Stakeholder

A person, group, or organization directly or indirectly involved or affected by a service.

e.g. the CEO of a company or a customer service representative in a call centre

Stakeholder Map

A visual or physical representation of the stakeholders in a service and the relationships between them.

e.g. a diagram showing the various people, groups, and organizations directly and indirectly involved in a service, representing relationships between them

Touchpoint

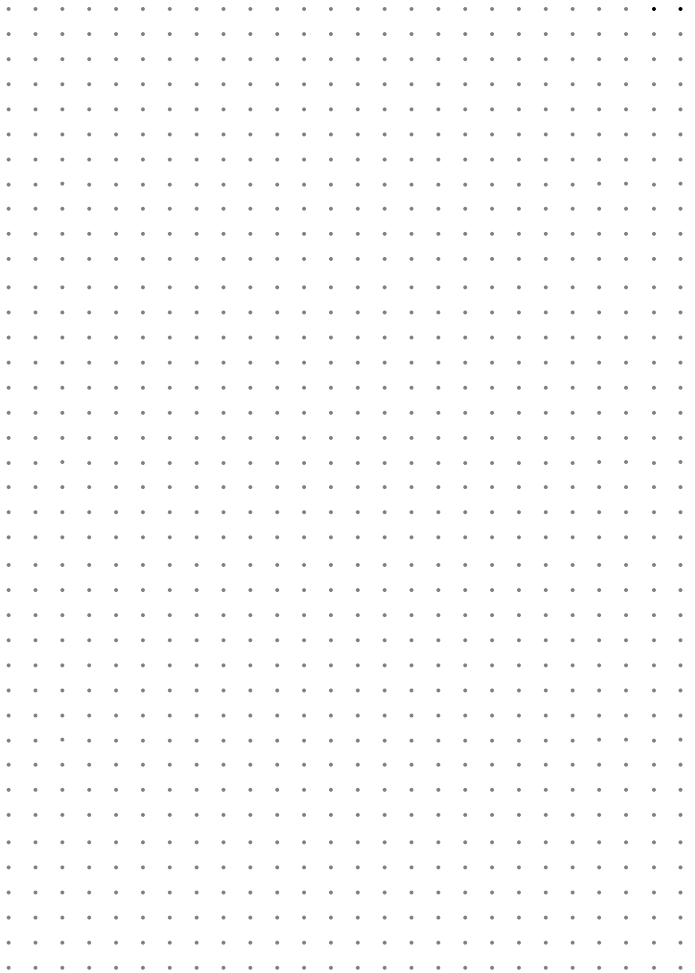
A point of contact between an actor and a service. Touchpoints may or may not be physical artefacts, and can include interactions, environments, and objects.

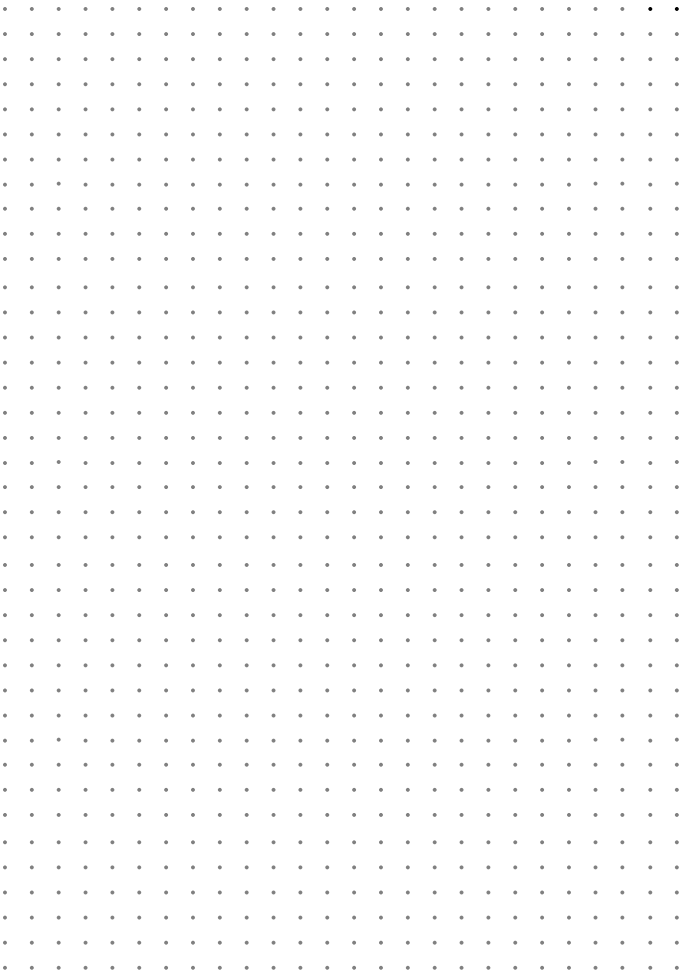
e.g. a customer interaction with a call center staff person

Wayfinding

Methods for understanding and navigating within a service system or environment. Wayfinding artefacts within a service can be physical, informational, or environmental.

e.g. store signage that indicates what is found in each aisle







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