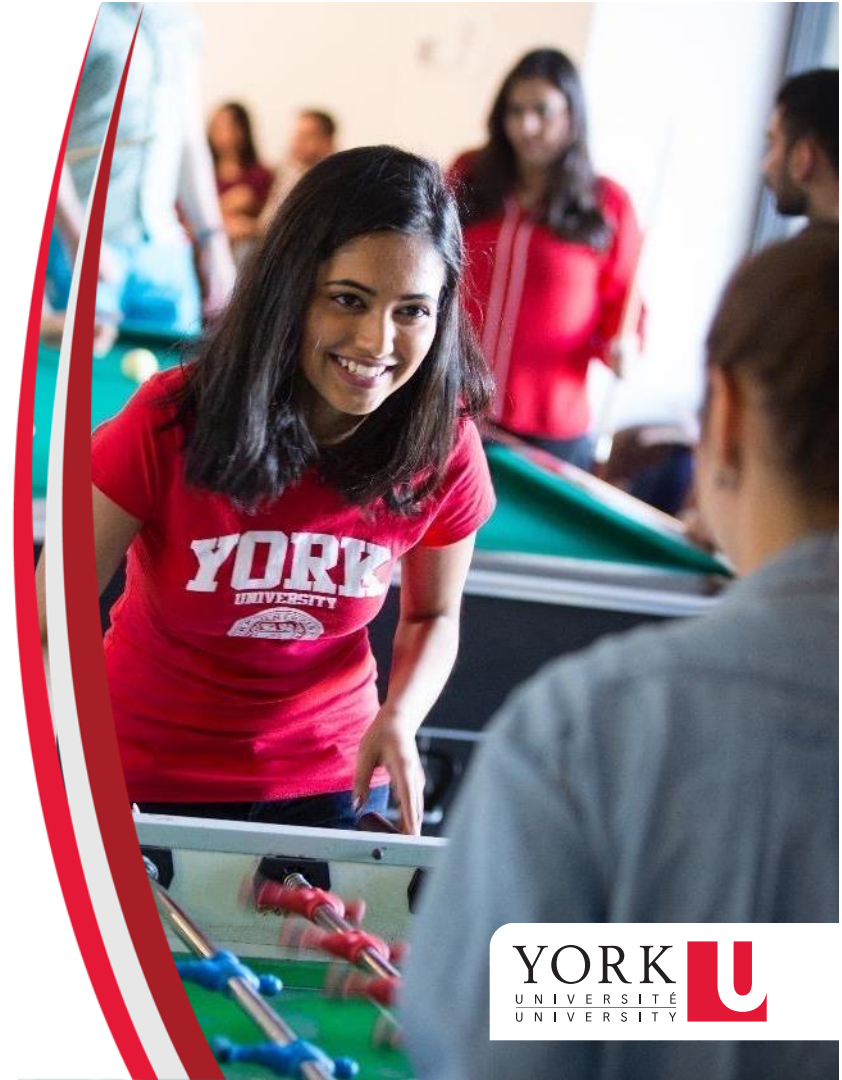


## Student Service Excellence Level 2: **Designing Improved Services**


**Division of Students PD Week**  
**Presenters: Matt Zilli & David Ip Yam**

July 22 & 23, 2020



# Agenda

1:30pm	Introduction ( <i>15 min</i> )
1:45pm	Activity 1: Experience Mapping ( <i>30 min</i> )
2:15pm	Activity 2: Brainstorming ( <i>15 min</i> )
2:30pm	Break ( <i>5 min</i> )
2:35pm	Activity 3: Concept Creation ( <i>30 min</i> )
3:05pm	Activity 4: Share Back & Feedback ( <i>25 min</i> )
3:30pm	Next Step: Storyboarding ( <i>10 min</i> )
3:40pm	Wrapping Up ( <i>20 min</i> )
4:00pm	Close

A photograph of a wooden desk in a dimly lit room. On the desk, there is a silver laptop with its keyboard visible, a black mug, a black notebook with a pen resting on it, and a black smartphone. A semi-transparent dark grey banner is overlaid across the middle of the image, containing white text.

# Dealing with realities of a large, hands-on online workshop

# Introduction

## *10 minutes*

**Student Service Excellence Level 2: Designing Improved Services**



# Today's purpose:

To get hands-on practice using some of the tools from the SSE Toolkit and apply them to improving a client experience for which you're responsible.

# About Today



## What today is:

A primer on how to use a few key service design tools and add them to your personal toolkit

**DIVISION OF STUDENTS**  
**PARTNERS IN STUDENT SUCCESS**



## What today is not:

A comprehensive breakdown of all service design-related tools, techniques and frameworks

# Other Helpful Resources



# Toolkit Overview

Four sections of tools to help embed service excellence into our fabric:



## Foundational

*"Help me understand the guiding principles for SSE."*



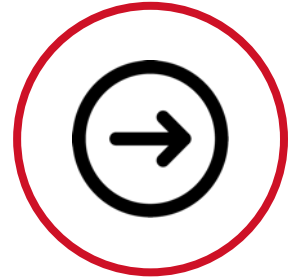
## Understand

*"Help me better understand the client / student experience."*



## Improve

*"Help me explore ways to improve the client / student experience."*



## Act

*"Help me start making a difference and measure the impact of my efforts."*

# Today's Focus

Four sections of tools to help embed service excellence into our fabric:



## Foundational

*"Help me understand the guiding principles for SSE."*



## Understand

*"Help me better understand the client / student experience."*



## Improve

*"Help me explore ways to improve the client / student experience."*

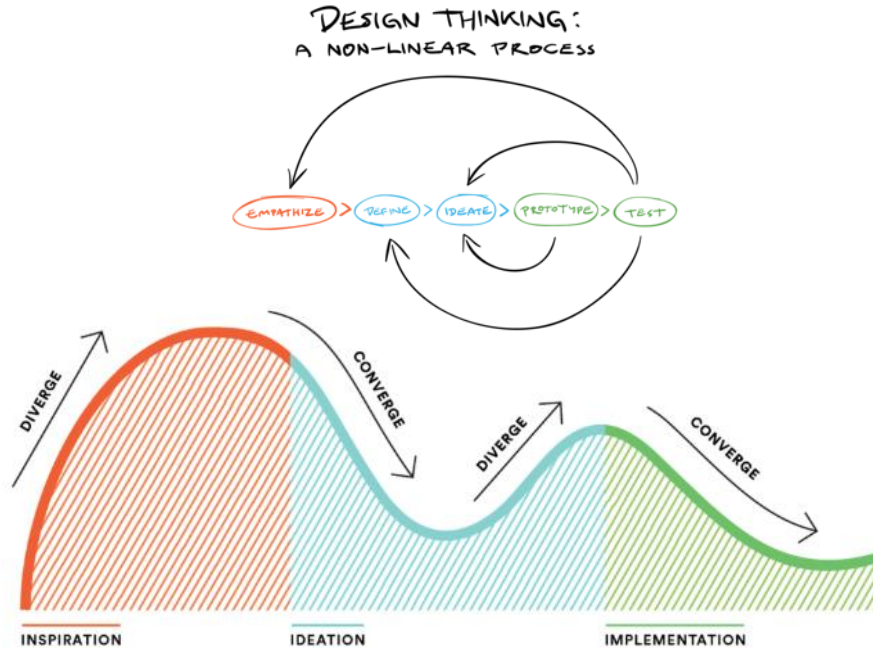


## Act

*"Help me start making a difference and measure the impact of my efforts."*



# Human-Centred Design (HCD)



Source: IDEO website <https://www.ideo.org/approach>

## What it is:

A creative problem solving and innovation methodology that focuses on better meeting the needs of people at the centre of a solution.

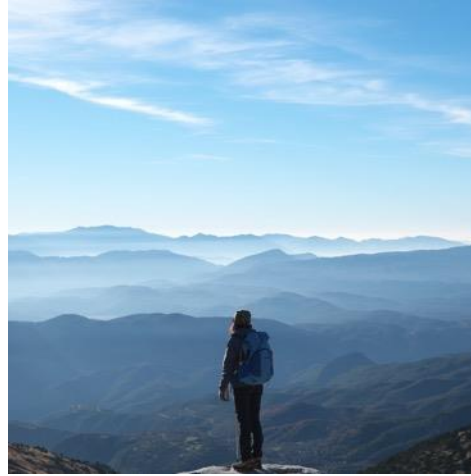
## What it isn't:

A linear process with easily predictable outputs.

# Three Keys of Good HCD



Take the time to  
deeply understand  
your clients

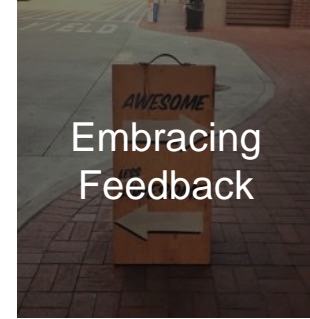
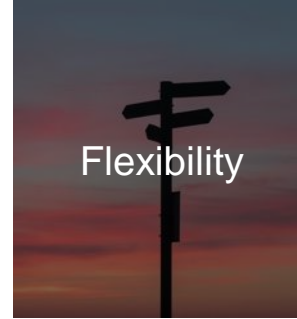
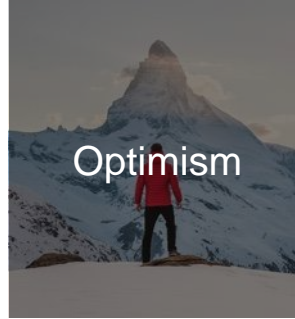


Boldly explore  
opportunities to better  
meet client needs



Get feedback from  
your clients early  
and often

# Mindsets for Service Design



# Stanford D.School Principles

Human-Centred

Mindful of Process

Radical Collaboration

Show Don't Tell

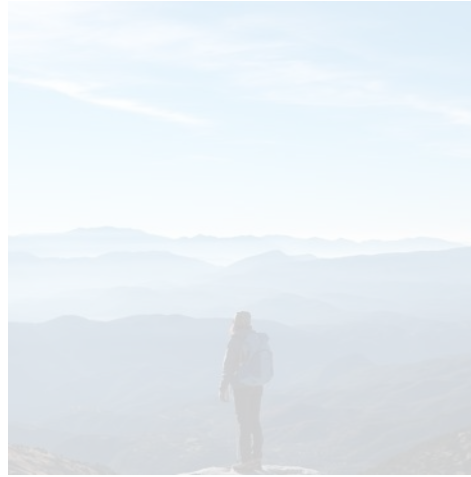
Culture of Prototyping

Bias Toward Action

# Step 1: Start with Research



Take the time to  
deeply understand  
your clients



Boldly explore  
opportunities to better  
meet client needs



Get feedback from  
your clients early  
and often

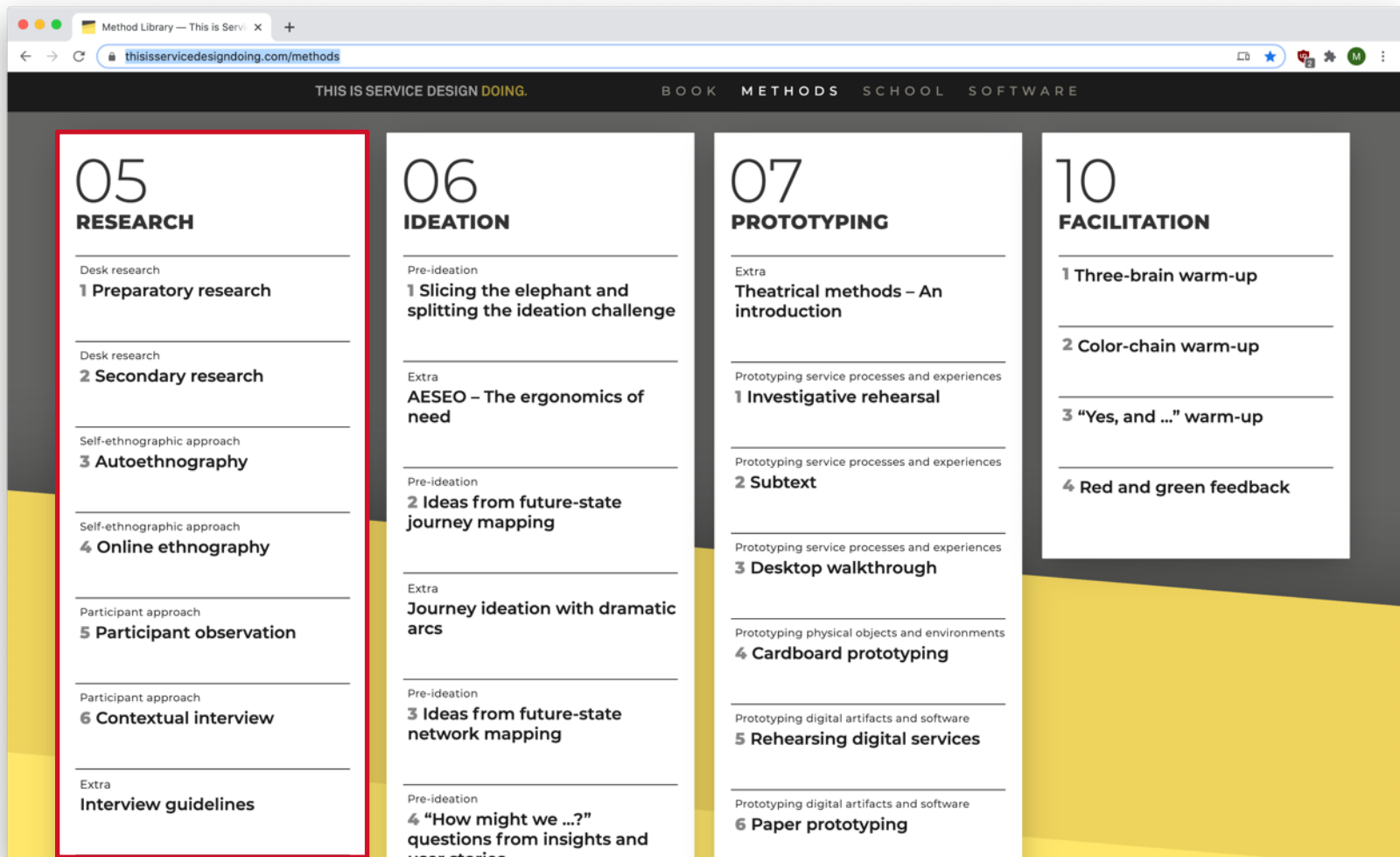


# Key Principle: Human-Centred

Ask yourself:

*“Who are we designing  
for? Do we deeply  
understand them?”*





## UNDERSTAND:

# CLIENT FEEDBACK CHEAT SHEET

Continuously improving service requires collecting and addressing client feedback on an ongoing basis. It's important to collect both quantitative (numbers) and qualitative (words) feedback. Quantitative feedback tells you the magnitude of an issue (e.g.; how satisfied or dissatisfied clients are with a service), whereas qualitative feedback reveals the root causes (e.g.; why clients are satisfied or dissatisfied).

Below are examples of questions you can ask your clients to get their feedback on a service. Try asking your clients some of the questions below in one-on-one, group or survey settings to help you determine how to improve a service. You can also use [this Microsoft Forms template](#) to create a simple online feedback form to send to your clients.

Question or prompt	When to ask this question	What it will help you determine
<b>"Tell me about your best and worst experiences [doing an activity that your service helps them with]."</b>  <b>Example:</b> "Tell me about your best and worst experiences registering with accessibility services."  <i>Qualitative feedback</i>	When you want to broadly understand a client's experiences trying to accomplish something that your service is responsible for.  Be sure to follow up with open-ended prompts (i.e.; can't be answered with 'yes' or 'no') like "tell me more about..." or "how did that make you feel?" to dig deeper into anything you find interesting about their answers.	This question will reveal what's top of mind for clients related to a specific activity like registering with accessibility services, including current pain points and unmet needs.  Any improvements you make to your service should aim to address the revealed pain points and unmet needs.
<b>"On a scale of 1 to 10, how likely are you to recommend this service to a friend or colleague?"</b>  <i>Quantitative feedback</i>	When you want to quantify your client's satisfaction with your service.  This question and its associated calculation are known as a net promoter score (NPS). For information on how to calculate an NPS, <a href="#">follow this link</a> .	This question will help you gauge your client's satisfaction with your service. In a nutshell, the more they like your service, the more likely they will be to recommend it.  As a rule of thumb, a positive NPS is considered to be good, and the higher that number, the better.
<b>"What do you like about [service element]?"</b>  <b>"What would you improve about [service element]?"</b>  <b>"What do you think is missing in [service element]?"</b>  <i>Qualitative feedback</i>	Ask these three questions in succession when you want to determine how to improve something about a service.  You could ask these questions about the entire service itself or any element within it, including the service environment (physical or digital) or how service providers interact with clients.	These three questions will help determine what the client thinks is working, not working or still missing in regards to an element of your service.  Doing this will help ensure that your efforts to improve the service are client-centred, and that the improvements themselves are something that clients actually desire.
<b>"What helped or hindered you [accomplishing a task related to the service]?"</b>  <b>Example:</b> What helped or hindered you with finding and navigating our offices?"  <i>Qualitative feedback</i>	When you want to find out what's helping or preventing a client from accomplishing a task related to your service.  If your clients say something is hindering them, a good follow-up question is: "how would you have expected that work?"	This question will help you identify roadblocks that clients come up against when trying to accomplish something related to your service.  The more you can eliminate any revealed roadblocks for clients, the less frustrated they will be with the efficiency and ease-of-use of your service.
<b>"On a scale of 1 to 10, how easy was [service element] to use?"</b>  <b>Example:</b> On a scale of 1 to 10, how easy was our website to use?  <i>Quantitative feedback</i>	When you want to quantify how easy or difficult a certain element of service was to use.  You could ask this question about the entire service itself or certain elements within it, including the service environment or any tools or templates used within the service.	This question will provide you with a metric that you can track over time to see how your improvement efforts are affecting the ease-of-use of service elements.  You can follow up this question with "why did you give that rating?" or "how would you have expected that to work?" to gather some additional qualitative feedback.


## NEXT STEPS

Continually collect feedback from clients and work with your team to use it to improve the services you deliver. You can use [this Microsoft Forms template](#) to create an online feedback form.

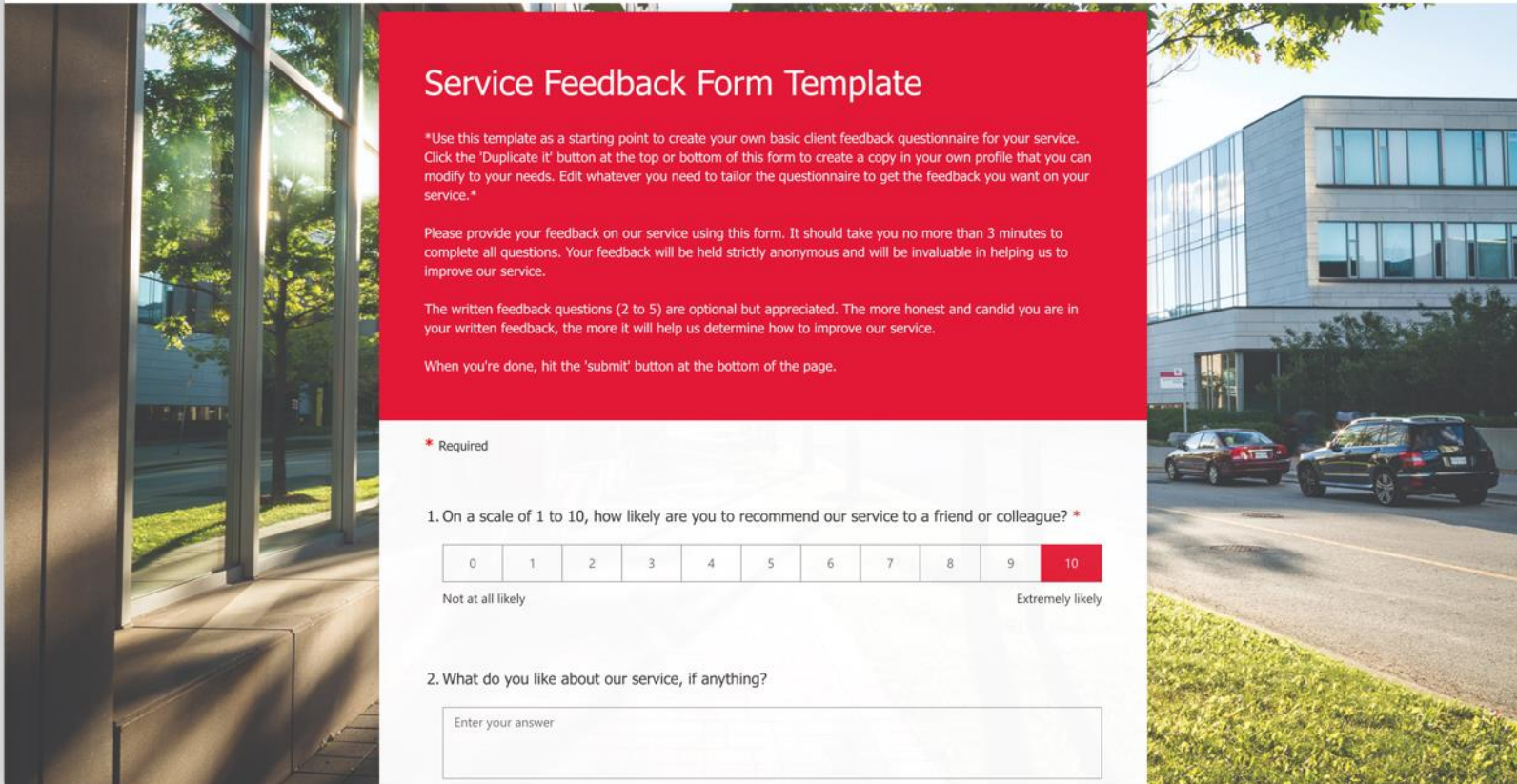


Service Feedback Form Template

forms.office.com/Pages/ShareFormPage.aspx?id=GBNTNBFW1E-H8KQ4FsB0Leak8RnDG9AiqS-YAiktE1URFNVME5TMUI0UzdXNE45OFdHUK00TDE5Uy4u&sharetoken=xeK7a0PWnokMzZkjZiMy

 Duplicate this form and start to use it as your own.

Duplicate it



## Service Feedback Form Template

\*Use this template as a starting point to create your own basic client feedback questionnaire for your service. Click the 'Duplicate it' button at the top or bottom of this form to create a copy in your own profile that you can modify to your needs. Edit whatever you need to tailor the questionnaire to get the feedback you want on your service.\*

Please provide your feedback on our service using this form. It should take you no more than 3 minutes to complete all questions. Your feedback will be held strictly anonymous and will be invaluable in helping us to improve our service.

The written feedback questions (2 to 5) are optional but appreciated. The more honest and candid you are in your written feedback, the more it will help us determine how to improve our service.

When you're done, hit the 'submit' button at the bottom of the page.

\* Required

1. On a scale of 1 to 10, how likely are you to recommend our service to a friend or colleague? \*

0	1	2	3	4	5	6	7	8	9	10
---	---	---	---	---	---	---	---	---	---	----

Not at all likely

Extremely likely

2. What do you like about our service, if anything?

Enter your answer

# Activity 1: Experience Mapping

## *30 minutes*

**Student Service Excellence Part 2: Designing Improved Services**



## Key Mindset: Empathy

*Being able to see the world from your client's perspective and begin to understand their needs and pain points.*



# Key Tool: Experience Maps

Method of visualizing the end-to-end client experience of a service or process, from their perspective.

Creating one helps identify opportunities to improve the experience.







# UNDERSTAND:

## EXPERIENCE MAP WORKSHEET

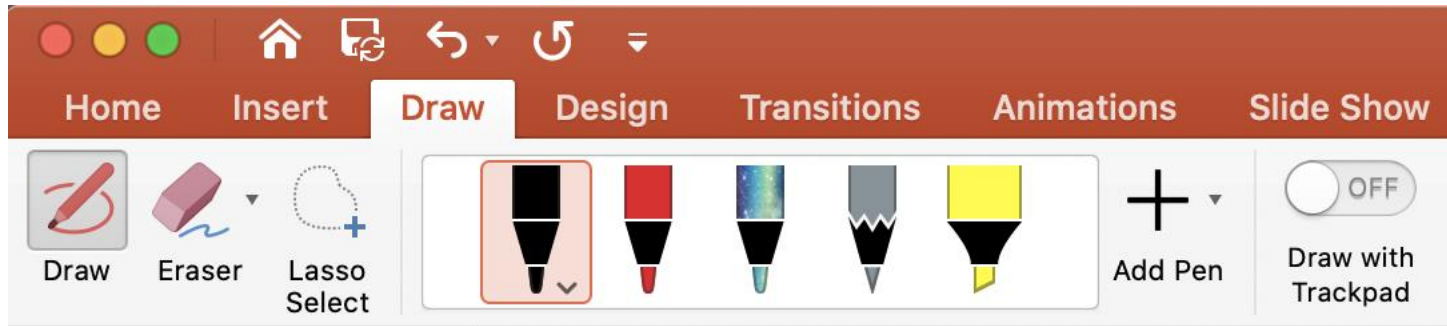
Before improving a service, you need to understand how a client experiences it. Use this to map the key moments of your client's current end-to-end experience with one of your processes or services from their perspective. This will help you discover opportunities to improve their experience. Use as many copies of this worksheet to fully capture their key moments from start to finish. If you're looking at an experience that can have multiple branching paths, then you might want to create a separate map for each.

CLIENT EXPERIENCE:

CLIENT:

	KEY MOMENT:	KEY MOMENT:	KEY MOMENT:
What is the client's <b>goal</b> ?			
What are they typically <b>thinking, feeling and doing</b> ?  <i>Draw on the smiley faces to capture their mood.</i>  	Thinking:   Feeling:   Doing:	Thinking:   Feeling:   Doing:	Thinking:   Feeling:   Doing:
Who or what are they <b>interacting</b> with?			
What <b>problems or roadblocks</b> might the client experience?			
How might you <b>improve</b> the key moment for the client?			

# Quick Aside: Drawing in PPT







# UNDERSTAND:

## EXPERIENCE MAP WORKSHEET

Before improving a service, you need to understand how a client experiences it. Use this to map the key moments of your client's current end-to-end experience with one of your processes or services from their perspective. This will help you discover opportunities to improve their experience. Use as many copies of this worksheet to fully capture their key moments from start to finish. If you're looking at an experience that can have multiple branching paths, then you might want to create a separate map for each.

CLIENT EXPERIENCE: Walk-in client requires advisory services (generic example)

CLIENT: Student

	KEY MOMENT:	KEY MOMENT:	KEY MOMENT:
What is the client's <b>goal</b> ?			
What are they typically <b>thinking, feeling and doing</b> ?  <i>Draw on the smiley faces to capture their mood.</i>  	Thinking:   Feeling:   Doing:	Thinking:   Feeling:   Doing:	Thinking:   Feeling:   Doing:
Who or what are they <b>interacting</b> with?			
What <b>problems or roadblocks</b> might the client experience?			
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# UNDERSTAND:

## EXPERIENCE MAP WORKSHEET

Before improving a service, you need to understand how a client experiences it. Use this to map the key moments of your client's current end-to-end experience with one of your processes or services from their perspective. This will help you discover opportunities to improve their experience. Use as many copies of this worksheet to fully capture their key moments from start to finish. If you're looking at an experience that can have multiple branching paths, then you might want to create a separate map for each.

CLIENT EXPERIENCE: Walk-in client requires advisory services (generic example)

CLIENT: Student





	1 KEY MOMENT: Client searches web for service	KEY MOMENT:	KEY MOMENT:
What is the client's <b>goal</b> ?	Finding a service to resolve their issue		
What are they typically <b>thinking, feeling and doing</b> ?	Thinking: "I hope that there's someone out there that can help me."  Feeling: Anxious 	Thinking:   Feeling: 	Thinking:   Feeling: 
Draw on the smiley faces to capture their mood.  	Doing: Searching the web for service that will help them solve their problem; reading our website	Doing:	Doing:
Who or what are they <b>interacting</b> with?	Web browser; search engine; our website		
What <b>problems or roadblocks</b> might the client experience?	Not knowing the right search terms; our service might not show up in the first page of results		
How might you <b>improve</b> the key moment for the client?	Improve website SEO; better understand what clients are searching for to find us		

## UNDERSTAND: EXPERIENCE MAP WORKSHEET

Before improving a service, you need to understand how a client experiences it. Use this to map the key moments of your client's current end-to-end experience with one of your processes or services from their perspective. This will help you discover opportunities to improve their experience. Use as many copies of this worksheet to fully capture their key moments from start to finish. If you're looking at an experience that can have multiple branching paths, then you might want to create a separate map for each.

CLIENT EXPERIENCE: Walk-in client requires advisory services (generic example)

CLIENT: Student

	1 KEY MOMENT: Client searches web for service	2 KEY MOMENT: Client arrives at our building	KEY MOMENT:
What is the client's goal?	Finding a service to resolve their issue	To find our office	
What are they typically thinking, feeling and doing?  <i>Draw on the smiley faces to capture their mood.</i>	Thinking: "I hope that there's someone out there that can help me."  Feeling: Anxious   Doing: Searching the web for service that will help them solve their problem; reading our website	Thinking: "Wow I didn't realize how big this building was..."   Feeling: Stressed about navigating our building   Doing: Arriving at the entrance of our building and reading the map / directory at the front to determine where we are	Thinking:   Feeling:   Doing:
Who or what are they interacting with?	Web browser; search engine; our website	Directory / map at front door	
What problems or roadblocks might the client experience?	Not knowing the right search terms; our service might not show up in the first page of results	The map is difficult to interpret, which makes it tough for clients to find our offices in the building; building layout is confusing	
How might you improve the key moment for the client?	Improve website SEO; better understand what clients are searching for to find us	Help the client better navigate to us; provide them with directions ahead of time	





# UNDERSTAND:

## EXPERIENCE MAP WORKSHEET

Before improving a service, you need to understand how a client experiences it. Use this to map the key moments of your client's current end-to-end experience with one of your processes or services from their perspective. This will help you discover opportunities to improve their experience. Use as many copies of this worksheet to fully capture their key moments from start to finish. If you're looking at an experience that can have multiple branching paths, then you might want to create a separate map for each.

CLIENT EXPERIENCE: Walk-in client requires advisory services (generic example)

CLIENT: Student

	1 KEY MOMENT: Client searches web for service	2 KEY MOMENT: Client arrives at our building	3 KEY MOMENT: Arriving at office
What is the client's goal?	Finding a service to resolve their issue	To find our office	To find someone to speak to about their problem
What are they typically thinking, feeling and doing?  Draw on the smiley faces to capture their mood.  	Thinking: "I hope that there's someone out there that can help me."  Feeling: Anxious   Doing: Searching the web for service that will help them solve their problem; reading our website	Thinking: "Wow I didn't realize how big this building was..."  Feeling: Stressed about navigating our building   Doing: Arriving at the entrance of our building and reading the map / directory at the front to determine where we are	Thinking: "It was tough enough to find this place and now I need to wait in line?"  Feeling: Frustrated   Doing: Waiting in line to speak to the front desk
Who or what are they interacting with?	Web browser; search engine; our website	Directory / map at front door	Queue in our office
What problems or roadblocks might the client experience?	Not knowing the right search terms; our service might not show up in the first page of results	The map is difficult to interpret, which makes it tough for clients to find our offices in the building; building layout is confusing	Long wait time to reach the front desk
How might you improve the key moment for the client?	Improve website SEO; better understand what clients are searching for to find us	Help the client better navigate to us; provide them with directions ahead of time	Some way to communicate current estimated wait time to client before they reach the office (e.g.; on our website or via text message)




# UNDERSTAND:

## EXPERIENCE MAP WORKSHEET

Before improving a service, you need to understand how a client experiences it. Use this to map the key moments of your client's current end-to-end experience with one of your processes or services from their perspective. This will help you discover opportunities to improve their experience. Use as many copies of this worksheet to fully capture their key moments from start to finish. If you're looking at an experience that can have multiple branching paths, then you might want to create a separate map for each.

CLIENT EXPERIENCE: Walk-in client requires advisory services (generic example)

CLIENT: Student





	4 KEY MOMENT: Front desk triages issue	KEY MOMENT:	KEY MOMENT:
What is the client's goal?	To speak to someone about their problem and get it resolved		
What are they typically thinking, feeling and doing?  <i>Draw on the smiley faces to capture their mood.</i>	Thinking: "How much longer is it until I can speak to someone?"  Feeling: Cautiously optimistic that someone is going to speak to them soon   Doing: Speaking to the front desk about their issue; front desk triages client and asks them to wait	Thinking:   Feeling:    Doing:	Thinking:   Feeling:    Doing:
Who or what are they interacting with?	Front desk		
What problems or roadblocks might the client experience?	Front desk not able to properly triage issue; client didn't bring required documents for service		
How might you improve the key moment for the client?	Better content specific training and support resources for front desk people; proactively reminding client what to bring		

# UNDERSTAND: EXPERIENCE MAP WORKSHEET

Before improving a service, you need to understand how a client experiences it. Use this to map the key moments of your client's current end-to-end experience with one of your processes or services from their perspective. This will help you discover opportunities to improve their experience. Use as many copies of this worksheet to fully capture their key moments from start to finish. If you're looking at an experience that can have multiple branching paths, then you might want to create a separate map for each.

CLIENT EXPERIENCE: Walk-in client requires advisory services (generic example)

CLIENT: Student

	4 KEY MOMENT: Front desk triages issue	5 KEY MOMENT: Client waits to speak to service provider	KEY MOMENT:
What is the client's goal?	To speak to someone about their problem and get it resolved	To speak to someone about their problem and get it resolved	
What are they typically thinking, feeling and doing?  <i>Draw on the smiley faces to capture their mood.</i>  	Thinking: "How much longer is it until I can speak to someone?"  Feeling: Cautiously optimistic that someone is going to speak to them soon   Doing: Speaking to the front desk about their issue; front desk triages client and asks them to wait	Thinking: "I hope I get to speak to them soon."  Feeling: Still cautiously optimistic that the wait will be short; anxious   Doing: Waiting to speak to a service provider	Thinking:   Feeling:    Doing:
Who or what are they interacting with?	Front desk	Waiting area	
What problems or roadblocks might the client experience?	Front desk not able to properly triage issue; client didn't bring required documents for service	Limited waiting area seating; waiting area can be loud; potentially long wait time	
How might you improve the key moment for the client?	Better content specific training and support resources for front desk people; proactively reminding client what to bring	Create better layout for waiting area to fit more chairs; install divider between waiting area and queue	



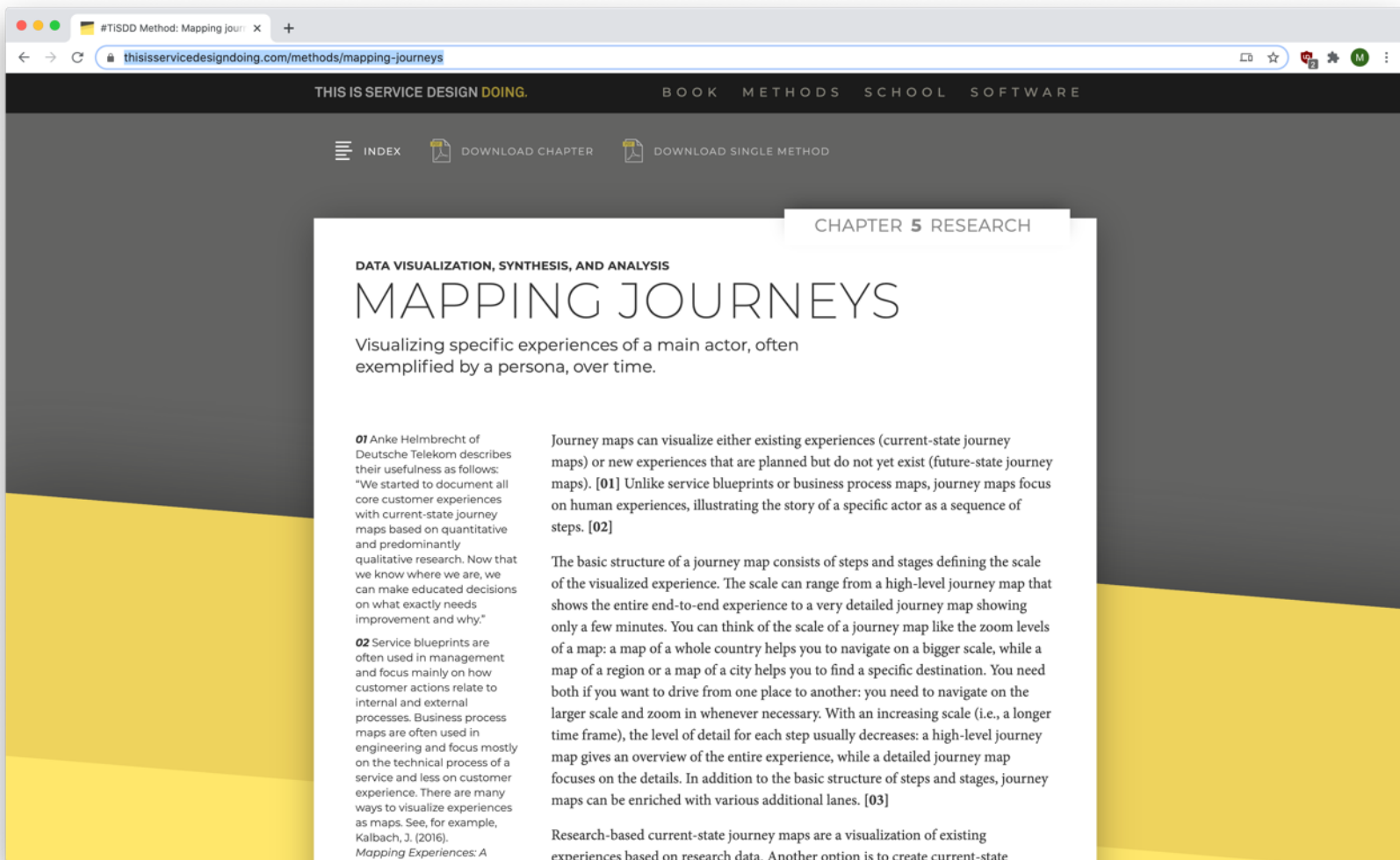
# **UNDERSTAND:** **EXPERIENCE MAP WORKSHEET**

Before improving a service, you need to understand how a client experiences it. Use this to map the key moments of your client's current end-to-end experience with one of your processes or services from their perspective. This will help you discover opportunities to improve their experience. Use as many copies of this worksheet to fully capture their key moments from start to finish. If you're looking at an experience that can have multiple branching paths, then you might want to create a separate map for each.

**CLIENT EXPERIENCE:** Walk-in client requires advisory services (generic example)

**CLIENT:** Student

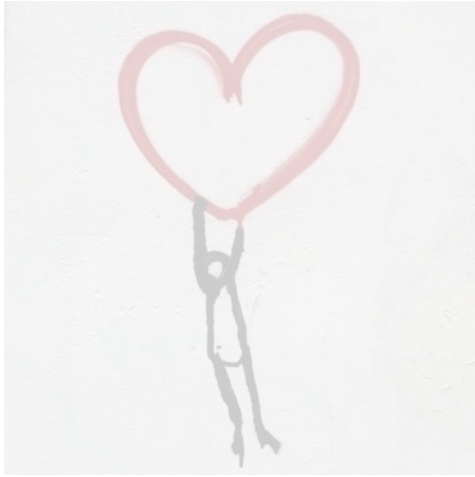
	4 KEY MOMENT: Front desk triages issue	5 KEY MOMENT: Client waits to speak to service provider	6 KEY MOMENT: Client speaks to service provider
What is the client's <b>goal</b> ?	To speak to someone about their problem and get it resolved	To speak to someone about their problem and get it resolved	To have their problem resolved
What are they typically <b>thinking, feeling and doing</b> ?	Thinking: "How much longer is it until I can speak to someone?"  Feeling: Cautiously optimistic that someone is going to speak to them soon  Doing: Speaking to the front desk about their issue; front desk triages client and asks them to wait	Thinking: "I hope I get to speak to them soon."  Feeling: Still cautiously optimistic that the wait will be short; anxious  Doing: Waiting to speak to a service provider	Thinking: "I'm glad that they were able to help me after all that!"  Feeling: Relieved  Doing: Speaking to the service provider
Who or what are they <b>interacting</b> with?	Front desk	Waiting area	Service provider's office
What <b>problems or roadblocks</b> might the client experience?	Front desk not able to properly triage issue; client didn't bring required documents for service	Limited waiting area seating; waiting area can be loud; potentially long wait time	Service provider can't resolve issue themselves and needs to escalate or refer to another unit
How might you <b>improve</b> the key moment for the client?	Better content specific training and support resources for front desk people; proactively reminding client what to bring	Create better layout for waiting area to fit more chairs; install divider between waiting area and queue	Cross-functional training for service providers; development of closer working relationship with related units



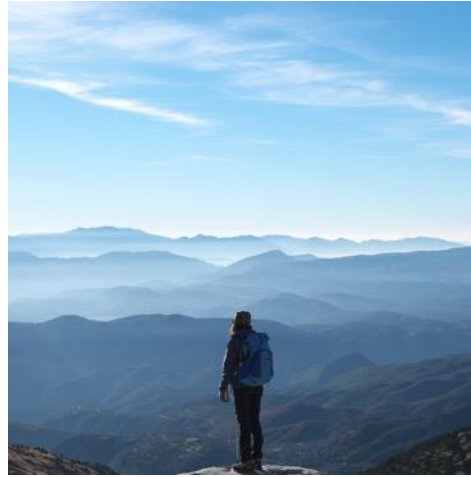
# Activity: Experience Mapping

1. Select a client experience you'd like to focus on improving over the course of today.
2. Use the experience map worksheet to capture the following for each key moment of the client's experience:
  - The client's goal;
  - What they're typically thinking, feeling or doing;
  - Who or what they're interacting with;
  - What problems or roadblocks they might experience;
  - And some potential opportunities to improve the key moment.
3. If you have time left over, think about which client problems or pain points you'd like to focus on solving with/for them.

# Step 2: Explore Ideas to Improve



Take the time to  
deeply understand  
your clients



Boldly explore  
opportunities to better  
meet client needs



Get feedback from  
your clients early  
and often

# Activity 2: Brainstorming

## *15 minutes*

**Student Service Excellence Part 2: Designing Improved Services**



# Key Mindset: Optimism

*Believing not only that services can be improved, but also that you have the ability to affect positive change.*



# Key Tool: 'How Might We' Statements

Creative way to  
rephrase and reframe  
problem statements or  
issues into  
opportunities to  
brainstorm new,  
innovative solutions.



# Brainstorming: Osborn's Rules



## Quantity > quality

*Generate as many ideas as possible*



## Suspend criticisms

*Don't toss out ideas at this point*



## Encourage wild ideas

*Be as imaginative as possible*



## Build on others' ideas

*Tap into diverse perspectives*

IMPROVE:

## BRAINSTORMING OPPORTUNITIES WORKSHEET

Once you've mapped the client's current experience from their perspective, brainstorm possible improvement opportunities. Use this worksheet to frame the service delivery problem that you're trying to improve, and brainstorm as many ideas as possible to address it. Do this activity individually or with others.

**1. Define the problem you're trying to solve.** Capture one issue or client pain point that exists within a service you deliver that you'd like to address.

*Example: "Clients are dissatisfied with our slow response times."*



**2. Define your desired outcome from solving the problem.** Capture what the end state would be if you address the issue or client pain point.

*Example: "We will be more responsive when clients ask for help."*



**3. Reframe your desired outcome as a 'how might we' statement.** A well-crafted 'how might we' statement will help frame your brainstorming efforts. Add the words "how might we" to the beginning of your desired outcome to transform it into a question.

*Example: "How might we be more responsive when clients ask for help?"*

**4. Brainstorm as many ideas to address your "how might we statement" as you can.** Set a timer for 5 minutes. Challenge yourself to come up with as many different ideas as possible. Remember that there are no such thing as bad ideas at this stage: the more ideas you can generate, the more you will have to work with going forward.



### NEXT STEPS

Take stock of all the ideas you have generated. Think about how you might be able to combine some of them into larger concepts. Use the other tools in this section of the toolkit to help you build out, communicate and get feedback on what you think are the most exciting and impactful concepts to address the problem.

IMPROVE:

## BRAINSTORMING OPPORTUNITIES WORKSHEET

Once you've mapped the client's current experience from their perspective, brainstorm possible improvement opportunities. Use this worksheet to frame the service delivery problem that you're trying to improve, and brainstorm as many ideas as possible to address it. Do this activity individually or with others.

**1. Define the problem you're trying to solve.** Capture one issue or client pain point that exists within a service you deliver that you'd like to address.

*Example: "Clients are dissatisfied with our slow response times."*

**Clients have a hard time finding where our service is physically located**



**2. Define your desired outcome from solving the problem.** Capture what the end state would be if you address the issue or client pain point.

*Example: "We will be more responsive when clients ask for help."*



**3. Reframe your desired outcome as a 'how might we' statement.** A well-crafted 'how might we' statement will help frame your brainstorming efforts. Add the words "how might we" to the beginning of your desired outcome to transform it into a question.

*Example: "How might we be more responsive when clients ask for help?"*

**4. Brainstorm as many ideas to address your "how might we statement" as you can.** Set a timer for 5 minutes. Challenge yourself to come up with as many different ideas as possible. Remember that there are no such thing as bad ideas at this stage: the more ideas you can generate, the more you will have to work with going forward.



### NEXT STEPS

Take stock of all the ideas you have generated. Think about how you might be able to combine some of them into larger concepts. Use the other tools in this section of the toolkit to help you build out, communicate and get feedback on what you think are the most exciting and impactful concepts to address the problem.



IMPROVE:

## BRAINSTORMING OPPORTUNITIES WORKSHEET

Once you've mapped the client's current experience from their perspective, brainstorm possible improvement opportunities. Use this worksheet to frame the service delivery problem that you're trying to improve, and brainstorm as many ideas as possible to address it. Do this activity individually or with others.

**1. Define the problem you're trying to solve.** Capture one issue or client pain point that exists within a service you deliver that you'd like to address.

*Example: "Clients are dissatisfied with our slow response times."*

**Clients have a hard time finding where our service is physically located**



**2. Define your desired outcome from solving the problem.** Capture what the end state would be if you address the issue or client pain point.

*Example: "We will be more responsive when clients ask for help."*

**The physical location of our service will be easier for clients to find**



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**How might we make the physical location of our service easier for clients to find?**

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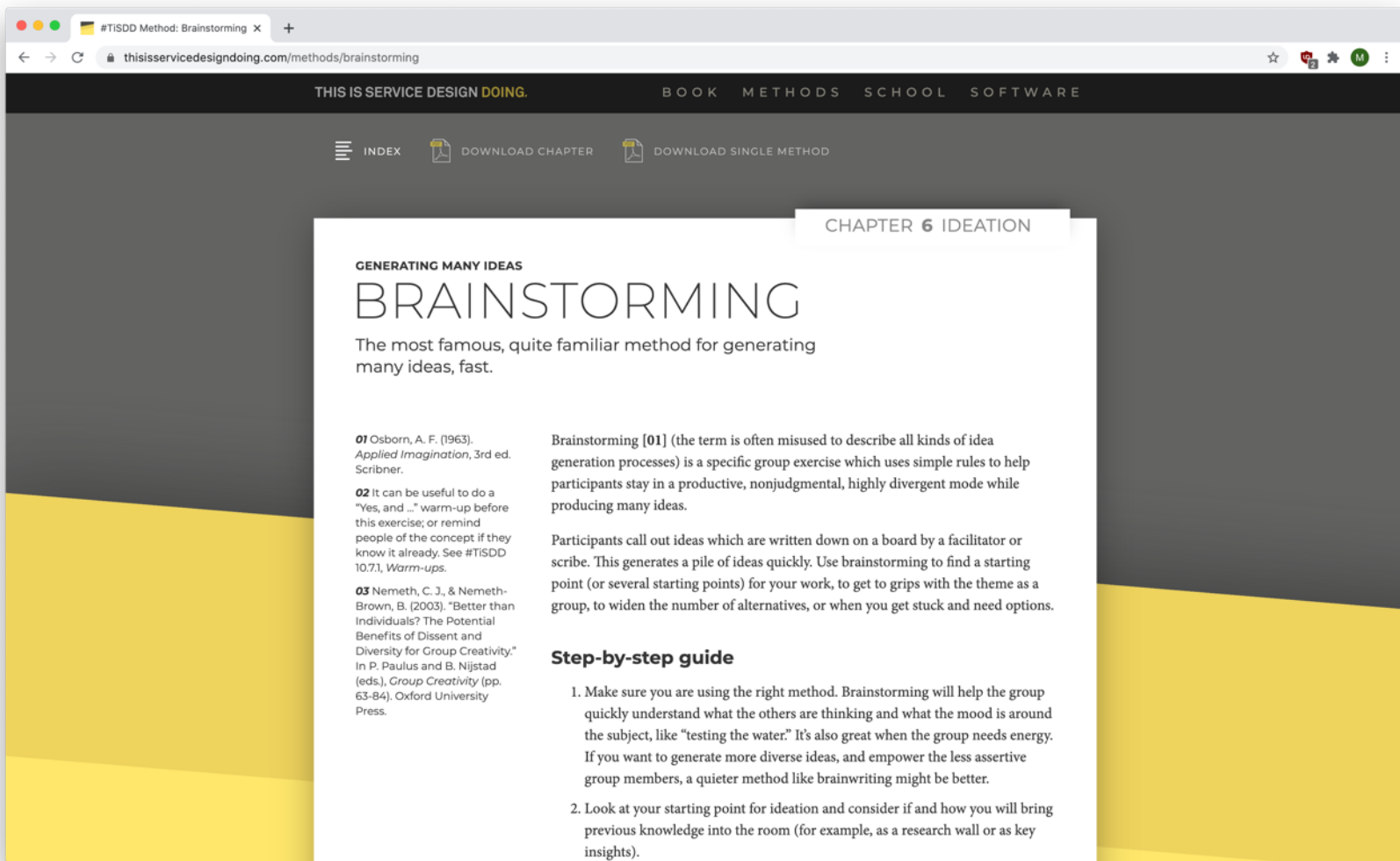
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- Create better signage inside and outside our building
- Create a downloadable / printable map
- Actively tell clients how to find us when we schedule an appointment with them
- Add Google Maps link to communications
- Ensuring we're accurately represented on Google Maps when clients search for us
- See-through / knock down walls
- Better info on website
- Greeters to guide clients around building
- Dotted lines on floor leading to our location like at hospitals or theme parks
- Sonar / pathfinding app
- Welcome video that includes showing clients how to find our location
- "Shuttle service" to pick up clients for appointments at entrance of building or other easy-to-find spot
- Booking digital or phone meetings instead of having clients come to see us
- Dial for help button
- Guide robot: goes back and forth on set path



### NEXT STEPS

Take stock of all the ideas you have generated. Think about how you might be able to combine some of them into larger concepts. Use the other tools in this section of the toolkit to help you build out, communicate and get feedback on what you think are the most exciting and impactful concepts to address the problem.



# Activity: Brainstorming

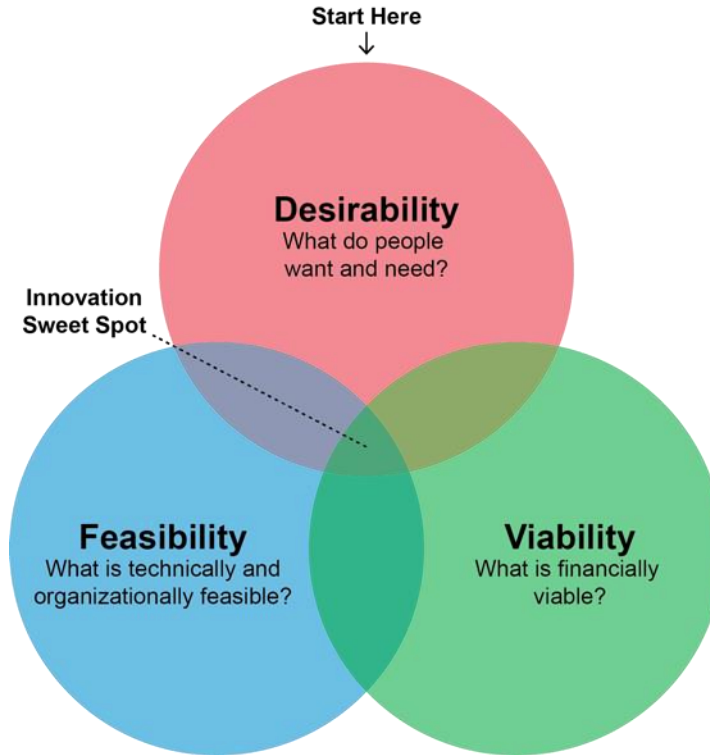
1. Based off of your experience map, pick a problem or pain point that you'd like to work on solving with/for your clients.
2. Using the brainstorming worksheet:
  - Define the problem you're trying to solve;
  - Capture the desired outcome from solving the problem;
  - Reframe the desired outcome as a 'how might we statement;'
  - And brainstorm as many ideas as possible to address the problem — quantity is better than quality at this point
3. If you have time left over, think about which idea (or bundles of ideas) you'd like to explore in more depth.



# Break



# The Innovation Sweet Spot



# Innovation Metaphor: Archery

The bullseye is a solution that is desirable, feasible and viable.

Need to initially aim higher as gravity (feasibility / viability) will naturally bring down your arrow.

Aim too low, and you undershoot.



# Activity 3: Concept Creation

## *30 minutes*

**Student Service Excellence Part 2: Designing Improved Services**



# Key Principle: Show Don't Tell

Ask yourself:

*"How could I explain  
this to someone  
without using words?"*

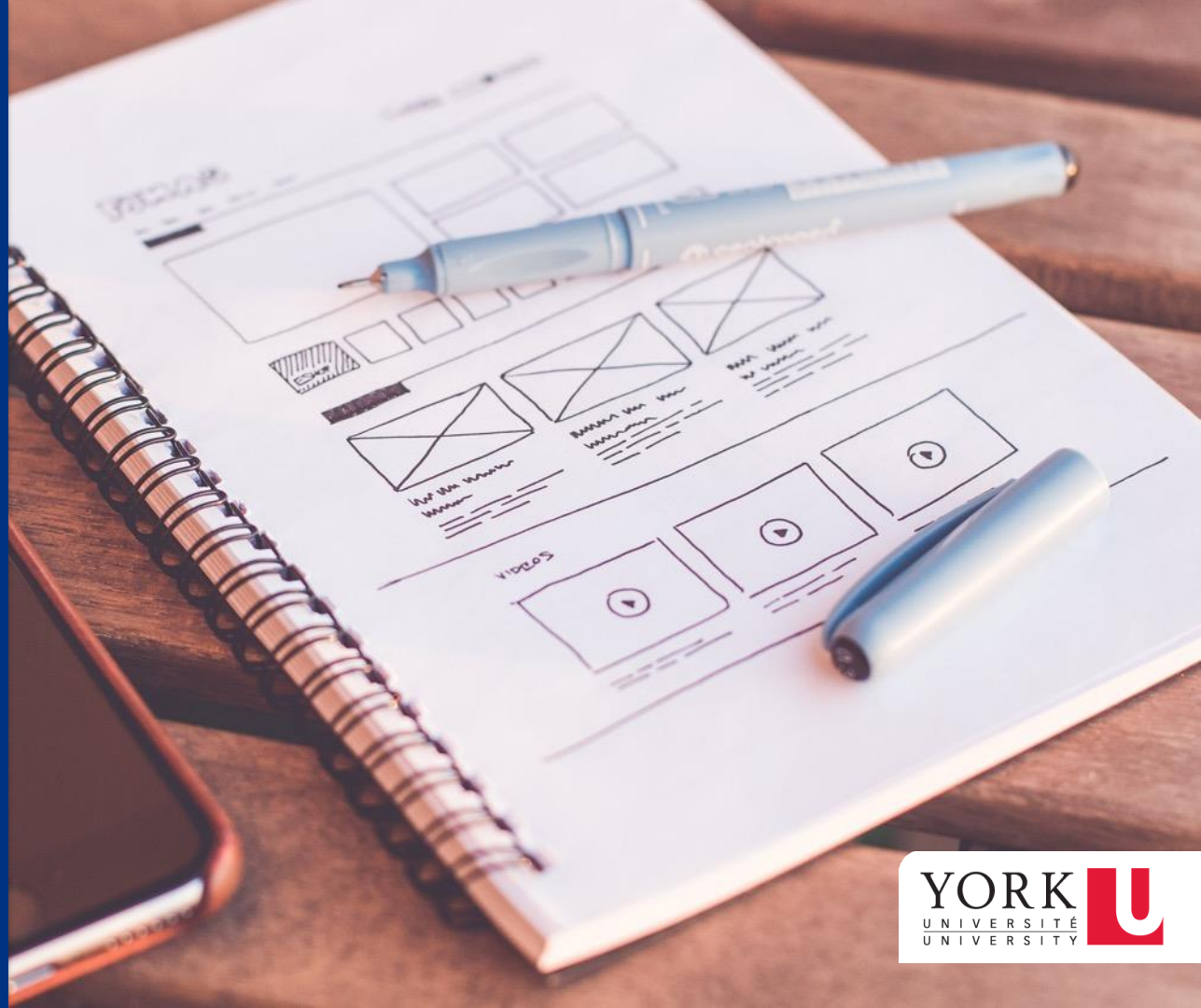




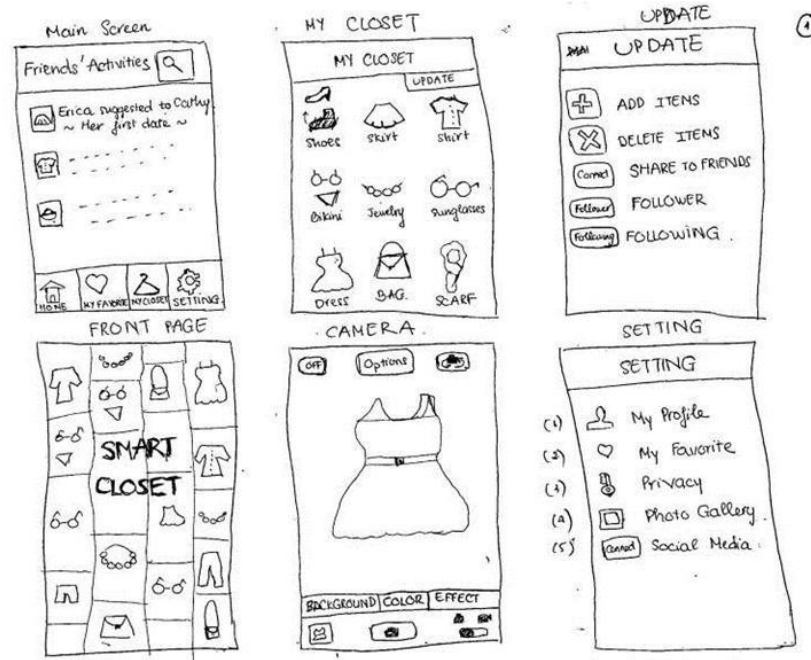
# Key Tool: Prototypes

Prototypes help make an idea tangible, and can be anything from a simple sketch to a functioning solution.

Sharing prototypes for feedback early and often helps de-risk the innovation process.



# Prototyping Isn't Fine Art



IMPROVE:  
**CONCEPT WORKSHEET**

**CONCEPT TITLE:**

Once you've brainstormed ideas to improve a client's service experience, use this worksheet to organize and communicate your best concept(s) at a high level so that your team and clients can offer feedback.

**Visualize your concept.** Draw a sketch or diagram or insert an image in the space below to help explain how your concept would work. Don't worry if it's rough or not perfect: this exercise is to help you quickly better communicate your concept to others.

**Describe how your concept would work at a high level.** Try to summarize the key elements of your concept in the space below without worrying about going into too much detail if you're unable to do so. Treat this like an elevator pitch: you want anyone you're sharing this concept with to be able to understand it in a short period of time.

**Capture the key benefits of your concept.** Frame these in terms of who within the York community would benefit from your concept, including the Division of Students or the University as a whole, and how they would benefit.

**NEXT STEPS**

Use this worksheet to help you collect feedback on your concept when you share it with others. Ask the following three questions and use the answers to help you improve your concept:

1. What do you like about this concept?

2. What would you improve about this concept?

3. What do you think is still missing?

## IMPROVE CONCEPT WORKSHEET

### CONCEPT TITLE Client Shuttle Service

Once you've brainstormed ideas to improve a client's service experience, use this worksheet to organize and communicate your best concept(s) at a high level so that your team and clients can offer feedback.

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**What if we went the extra mile to help clients navigate their way to our office when they arrive to speak with us?**

We'd place highly visible signage with a phone number on it at the front entrance of the building. The sign would direct clients to call or text the number if it's the first time coming to see us or they don't remember where to go. The client would then text or call the number to let us know that they've arrived and need help finding our office.

A service provider would be notified that a client has arrived. They would then go down to greet the client and bring guide them to their office. For the sake of efficiency, they could even begin determine how to help the client as they head to the office.

**Capture the key benefits of your concept.** Frame these in terms of who within the York community would benefit from your concept, including the Division of Students or the University as a whole, and how they would benefit.

Clients would be less frustrated with wayfinding and feel that we are providing better service.

We'd benefit by seeing fewer late starts to pre-scheduled meetings and hopefully retain more clients as a result of them being happier.

### NEXT STEPS

Use this worksheet to help you collect feedback on your concept when you share it with others. Ask the following three questions and use the answers to help you improve your concept:

1. What do you like about this concept?

2. What would you improve about this concept?

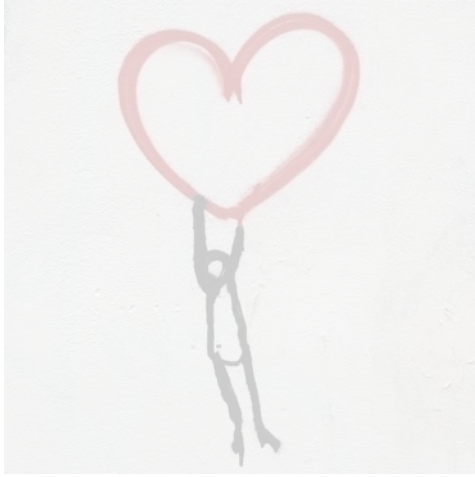
3. What do you think is still missing?

# Activity: Concept Creation

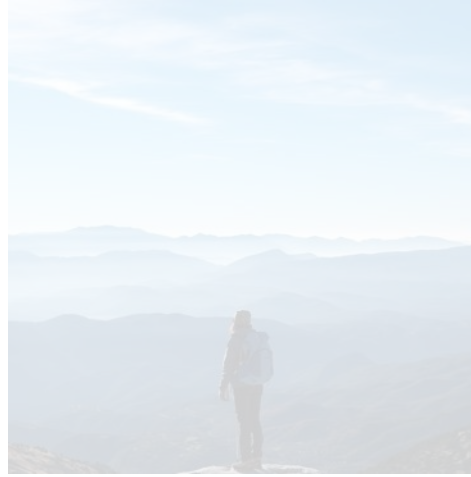
1. Based off of your brainstorming worksheet, choose an idea or bundle of ideas to build out into a more tangible concept.
2. Using the concept worksheet, accomplish the following in any order you like:
  - Create a simple visualization of your concept.
  - Describe how your concept would work at a high level.
  - Capture the key benefits of your concept.
3. Prepare to share your concept back with a breakout group.

*If you'd prefer to work digitally, you can use PowerPoint and free stock photo / icon websites to create your visualization. Otherwise, feel free to draw something by hand on a separate piece of paper.*

# Step 3: Get Feedback



Take the time to  
deeply understand  
your clients



Boldly explore  
opportunities to better  
meet client needs



Get feedback from  
your clients early  
and often



# Activity 4: Share Back & Feedback

## *25 minutes*

**Student Service Excellence Part 2: Designing Improved Services**

# Key Mindset: Embracing Feedback

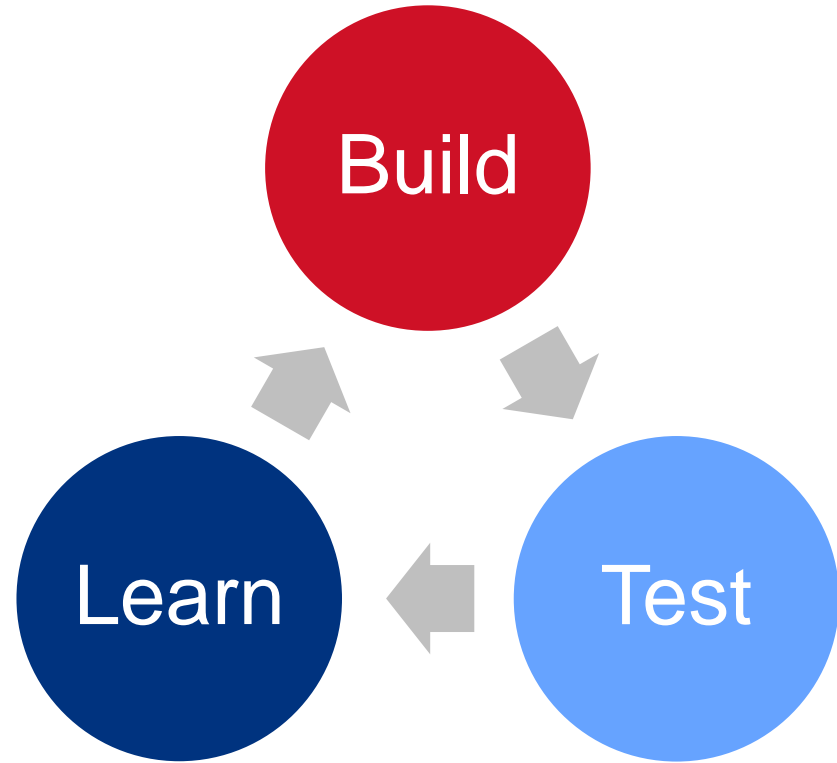
*Making it a priority to continuously seek out, listen to and reflect on feedback will only serve to help us improve the way we do things.*



# Key Technique: Iteration

A solution is never truly “done.” There’s always something about the solution itself or the way it's delivered that can be fine-tuned.

Consistently gathering feedback from a variety of clients will help identify ways to continually improve solutions.



Incorporating feedback de-risks the innovation process and helps ensure you're on track to delivering a great solution.



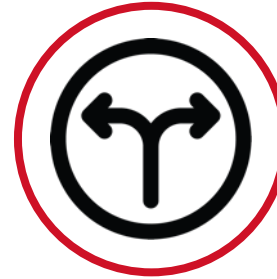
# Who to Ask for Feedback



Service  
Clients



Service  
Providers



Decision-  
makers



Other Key  
Stakeholders

# Three Helpful Questions

1. What do you like about [X]?
2. What would you improve about [X]?
3. What do you think is still missing from [X]?



# Tips for Receiving Feedback



Be open and positive,  
not dismissive or defensive



Ask clarifying questions,  
and discuss alternatives

# Tips for Providing Feedback



Have an honest, yet  
constructive conversation



Explain your thinking,  
and be clear and specific

Design Kit



designkit.org/methods/get-feedback

☆🔒📧⌵

DESIGN KIT

brought to you by  
IDEO·ORG

MINDSETSMETHODSCASE STUDIESRESOURCESSIGN UP | LOG IN



# Get Feedback

You've learned and built. Now share what you've made with the people you're designing for and see what they think.

STATS

Suggested Time

60-90 Minutes

Level of Difficulty

Moderate

Materials Needed

Pens, paper, your prototype

Participants

Design team, people you're designing for

PROCESS PHASE

Soliciting feedback on your ideas and prototypes is a core element of the Ideation Phase, and it helps keep the people you're designing for at the center of your project. It's also a direct path to designing something that those same people will adopt. If the point of a prototype is to test an idea, then collecting feedback from potential users is what pushes things forward.

01

Now that you've got a prototype to share, get it in front of the people you're designing for. There are lots of ways to do it: Reconvene a [Group Interview](#), intercept people in markets for [Interviews](#), do another [Expert Interview](#) with your prototype, or perhaps run a [Co-Creation Session](#) designed to solicit feedback.

02

Capturing honest feedback is crucial. People may praise your prototype to be nice, so assure them that this is only a tool by which to learn and that you welcome honest, even negative feedback.

# Activity: Share Back & Feedback

In your breakout rooms, take few minutes each to do the following:

1. Share back your concept with your group.
2. Ask for feedback on your concept. Remember to try and ask the following three questions:
  - “What do you like about the concept?”
  - “What would you improve about the concept?”
  - “What do you think is still missing from the concept?”

**Note:** Be sure to write down any feedback you receive!

Use the feedback to iterate on your idea  
and build it out further.





# Next Step: Storyboarding

## *10 minutes*

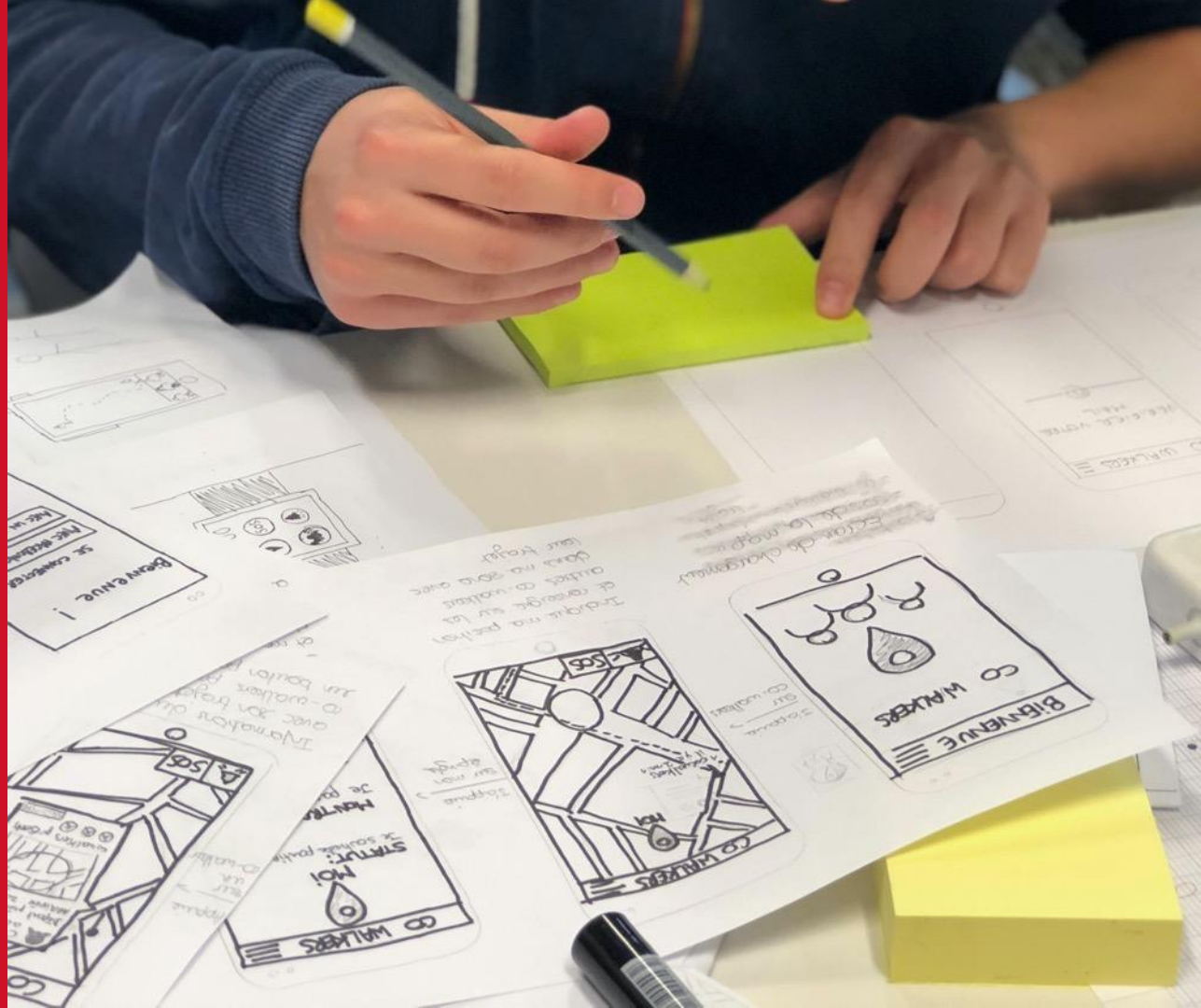
**Student Service Excellence Part 2: Designing Improved Services**



# Key Principle: Culture of Prototyping

Ask yourself:

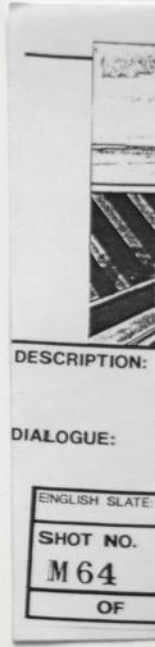
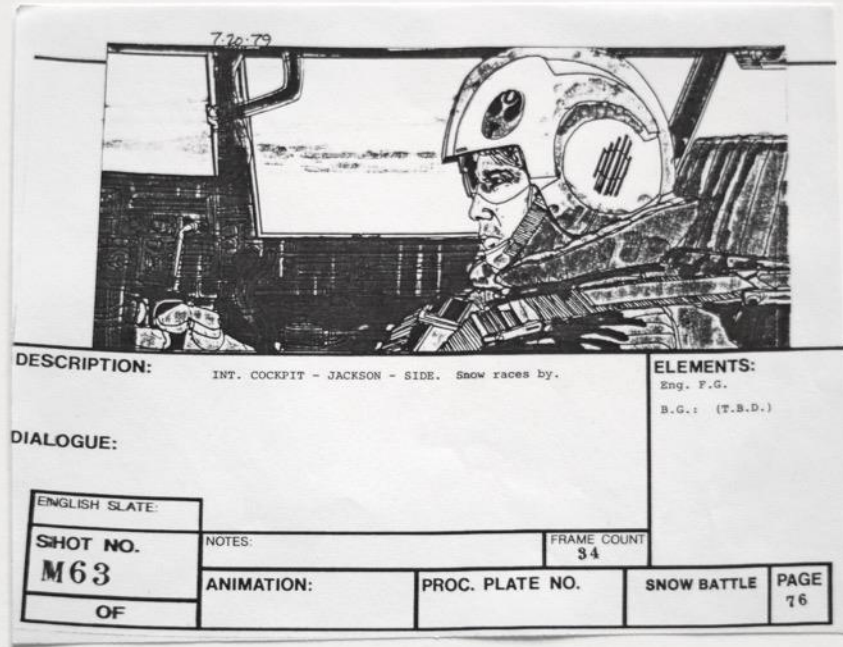
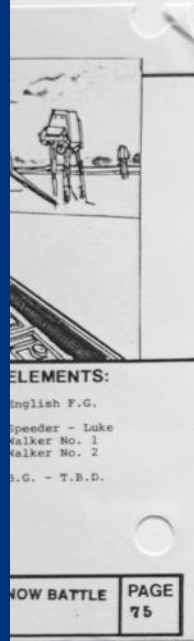
*“How do we make an  
early idea tangible to  
generate feedback?”*




# Key Tool: Storyboard

A storyboard helps visualize how a proposed solution will play out from beginning to end.

It helps you think through your solution in greater detail, including who will use it, where and how, as well as identifying any required supporting resources.





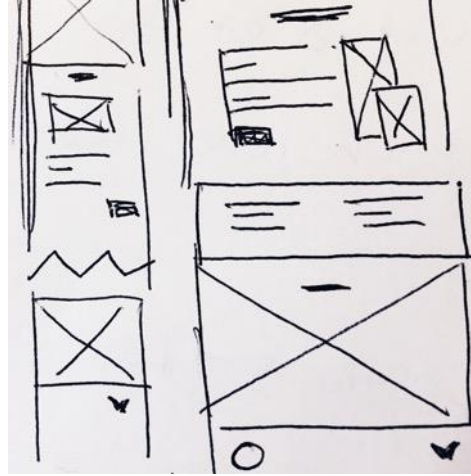
**Remember:** Every story has a beginning, middle and end.



# Other Storyboarding Tips



Think carefully about who or what is involved in each key moment



This is about thinking through your idea, not your drawing ability



You can create multiple storyboards for a single experience

IMPROVE:

## FUTURE-STATE STORYBOARD WORKSHEET

After identifying opportunities and concepts to improve the client experience, it's useful to build out how that improved future experience will unfold end-to-end in chronological order. Use as many copies of this worksheet as you need to create a storyboard that captures and visualizes the key moments of an improved client experience from start to finish.

CLIENT EXPERIENCE:

CLIENT:



KEY MOMENT:



KEY MOMENT:



KEY MOMENT:

**Visualize what happens in this key moment of the improved client experience.** Draw a simple sketch or diagram or insert an image in the space below.

**Describe what happens in this key moment.** Try to capture what the client should be thinking, feeling and doing and who or what they're interacting with.

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### NEXT STEPS

When your full storyboard is complete, walk others through it to get their feedback. Ask the following three questions and use the answers to help you further improve the experience:

1. What do you like about this experience?

2. What would you improve about this experience?

3. What do you think is missing?



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CLIENT EXPERIENCE: Client Shuttle Service

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CLIENT EXPERIENCE: Client Shuttle Service

CLIENT: Student

1

KEY MOMENT: Client arrives to building

Visualize what happens in this key moment of the improved client experience. Draw a simple sketch or diagram or insert an image in the space below.



Describe what happens in this key moment. Try to capture what the client should be thinking, feeling and doing and who or what they're interacting with.

The client arrives at the main entrance of the building. They're hoping to speak with us to get support within an issue they're facing and are feeling anxious about it. They're also feeling overwhelmed upon seeing how large and confusing the layout of our building is, especially since there's no front desk.

KEY MOMENT:

Visualize what happens in this key moment of the improved client experience. Draw a simple sketch or diagram or insert an image in the space below.

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CLIENT: Student

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The client arrives at the main entrance of the building. They're hoping to speak with us to get support within an issue they're facing and are feeling anxious about it. They're also feeling overwhelmed upon seeing how large and confusing the layout of our building is, especially since there's no front desk.

2

KEY MOMENT: Client calls number

Visualize what happens in this key moment of the improved client experience. Draw a simple sketch or diagram or insert an image in the space below.



Describe what happens in this key moment. Try to capture what the client should be thinking, feeling and doing and who or what they're interacting with.

The client notices a sign for our service posted at the front entrance of the building. It encourages the client to either call or text the number on the sign if they need help finding our office. The client, feeling less anxious, decides to call the number.



KEY MOMENT:

Visualize what happens in this key moment of the improved client experience. Draw a simple sketch or diagram or insert an image in the space below.

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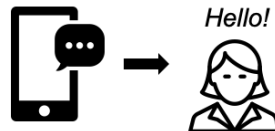
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The client notices a sign for our service posted at the front entrance of the building. It encourages the client to either call or text the number on the sign if they need help finding our office. The client, feeling less anxious, decides to call the number.

3

KEY MOMENT: Front desk receives call

Visualize what happens in this key moment of the improved client experience. Draw a simple sketch or diagram or insert an image in the space below.



Describe what happens in this key moment. Try to capture what the client should be thinking, feeling and doing and who or what they're interacting with.

A person at the front desk receives the client's call. They warmly greet the client and let them know that someone will be come down to get them. The client is relieved.

The person at the front desk then asks an available service provider to go meet the client.

## NEXT STEPS

When your full storyboard is complete, walk others through it to get their feedback. Ask the following three questions and use the answers to help you further improve the experience:

1. What do you like about this experience?

2. What would you improve about this experience?

3. What do you think is missing?

## IMPROVE:

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CLIENT EXPERIENCE: Client Shuttle Service

CLIENT: Student

4

KEY MOMENT: Service provider goes to meet the client

Visualize what happens in this key moment of the improved client experience. Draw a simple sketch or diagram or insert an image in the space below.



Describe what happens in this key moment. Try to capture what the client should be thinking, feeling and doing and who or what they're interacting with.

The service provider goes to meet the client, who has been waiting by the sign. They introduce themselves to the client and let them know that they'll be helping them today. The service provider then starts to lead the client back to the office. The client is thankful that someone has come to meet them.

KEY MOMENT:

Visualize what happens in this key moment of the improved client experience. Draw a simple sketch or diagram or insert an image in the space below.

Describe what happens in this key moment. Try to capture what the client should be thinking, feeling and doing and who or what they're interacting with.

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## NEXT STEPS

When your full storyboard is complete, walk others through it to get their feedback. Ask the following three questions and use the answers to help you further improve the experience:

1. What do you like about this experience?

2. What would you improve about this experience?

3. What do you think is missing?



## IMPROVE:

# FUTURE-STATE STORYBOARD WORKSHEET

After identifying opportunities and concepts to improve the client experience, it's useful to build out how that improved future experience will unfold end-to-end in chronological order. Use as many copies of this worksheet as you need to create a storyboard that captures and visualizes the key moments of an improved client experience from start to finish.

CLIENT EXPERIENCE: Client Shuttle Service

CLIENT: Student

4

KEY MOMENT: Service provider goes to meet the client

Visualize what happens in this key moment of the improved client experience. Draw a simple sketch or diagram or insert an image in the space below.



Describe what happens in this key moment. Try to capture what the client should be thinking, feeling and doing and who or what they're interacting with.

The service provider goes to meet the client, who has been waiting by the sign. They introduce themselves to the client and let them know that they'll be helping them today. The service provider then starts to lead the client back to the office. The client is thankful that someone has come to meet them.

5

KEY MOMENT: Arriving at the office

Visualize what happens in this key moment of the improved client experience. Draw a simple sketch or diagram or insert an image in the space below.



Describe what happens in this key moment. Try to capture what the client should be thinking, feeling and doing and who or what they're interacting with.

The service provider brings the client to the office. On the trip there, the service provider has already started to speak with the client and better understand their service needs. The client is happy that they are being heard and are receiving excellent service.



KEY MOMENT:

Visualize what happens in this key moment of the improved client experience. Draw a simple sketch or diagram or insert an image in the space below.

Describe what happens in this key moment. Try to capture what the client should be thinking, feeling and doing and who or what they're interacting with.

## NEXT STEPS

When your full storyboard is complete, walk others through it to get their feedback. Ask the following three questions and use the answers to help you further improve the experience:

1. What do you like about this experience?

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3. What do you think is missing?

Student Service Excellence Toolkit

excellence.students.yorku.ca/toolkit

Example 2: Accessing Tait Mackenzie

Example 3: Waiting for Decision from York

## Improve

"Help me explore ways to improve the client/student experience."

**Goals:**

- Identify practical opportunities to improve the client/student experience.
- Articulate and share back opportunities.
- Socialize opportunities to get feedback.

<p><b>Brainstorming opportunities worksheet:</b> Generate ideas to improve the client experience.</p> <p><b>Example:</b> Finding out where services are physically located</p>	<p><b>Concept worksheet:</b> Capture your idea and communicate why it matters.</p> <p><b>Example 1:</b> Navigating in-person admission inquiries</p> <p><b>Example 2:</b> Quick and easy student referrals with Civitas: Inspire</p> <p><b>Example 3:</b> Linking Outlook e-mail to the Advocate system</p> <p><b>Example 4:</b> Including various perspectives in problem solving</p>	<p><b>Future-state storyboard worksheet:</b> Think through how an improved client experience would unfold.</p> <p><b>Example 1:</b> Completing the first steps of Becoming YU</p> <p><b>Example 2:</b> Receiving a pop-up reminder from the Student Virtual Assistant</p> <p><b>Example 3:</b> Making effective referrals and updating a student record</p> <p><b>Example 4:</b> Seeking assistance with OSAP restriction solving</p>
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## Act

"Help me start making a difference and measure the impact of my efforts."

**Goals:**

- Provide actions and strategies for use in day-to-day role to improve service delivery.
- Measure the impact of efforts with an eye to continuous improvement.
- Hire and recruit for service excellence.


Design Kit

designkit.org/methods/storyboard

DESIGN KIT

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## Storyboard

A quick, low-resolution prototype, a Storyboard can help you visualize your concept from start to finish.

STATS

Suggested Time

60 Minutes

Level of Difficulty

Easy

Materials Needed

Pens, paper

Participants

Design team

PROCESS PHASE

You don't need to be a great artist to create a great Storyboard. By visually plotting out elements of your product or service, you can learn a lot about your idea. Not only will this method help you refine what your idea is, it can also reveal who will use it, where, and how. Like all prototypes, the idea here is to make something really rough as a way to help you think the idea through. It's amazing what putting pen to paper can reveal.

01

With a partner, determine what it is you want to prototype. You don't have to Storyboard the entire offering. Use it to test even one component of your idea, like an interaction, or how a customer finds your product.

02

Spend no more than 30-45 minutes drawing how your ideas work. Use a series of comic book-style frames for your drawing. This will help you spotlight key moments and build a short narrative

# Wrapping Up *20 minutes*

**Student Service Excellence Part 2: Designing Improved Services**



# What Service Excellence is All About

“Embracing a culture of service excellence, in which we all are responsible for supporting each other’s success”

– *UAP 2020-2025*



# Toolkit Overview

Four sections of tools to help embed service excellence into our fabric:



## Foundational

*"Help me understand the guiding principles for SSE."*



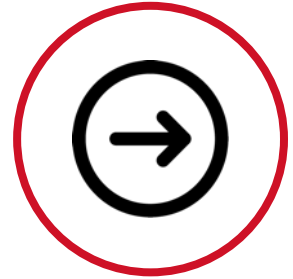
## Understand

*"Help me better understand the client / student experience."*



## Improve

*"Help me explore ways to improve the client / student experience."*



## Act

*"Help me start making a difference and measure the impact of my efforts."*

# What We Covered Today

Four sections of tools to help embed service excellence into our fabric:



## Foundational

*"Help me understand the guiding principles for SSE."*



## Understand

*"Help me better understand the client / student experience."*



## Improve

*"Help me explore ways to improve the client / student experience."*



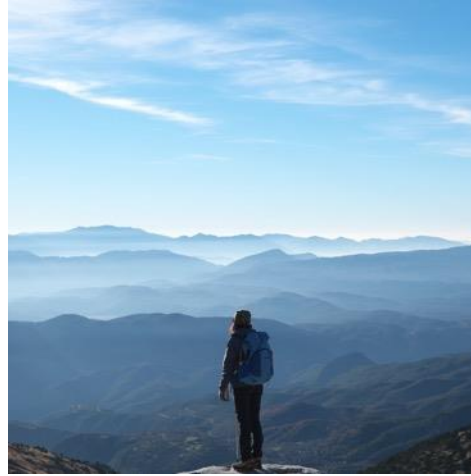
## Act

*"Help me start making a difference and measure the impact of my efforts."*

# Recap: Three Keys of Good HCD



Take the time to  
deeply understand  
your clients



Boldly explore  
opportunities to better  
meet client needs



Get feedback from  
your clients early  
and often

# Other Helpful Resources



# The Remaining Section

Four sections of tools to help embed service excellence into our fabric:



## Foundational

*"Help me understand the guiding principles for SSE."*



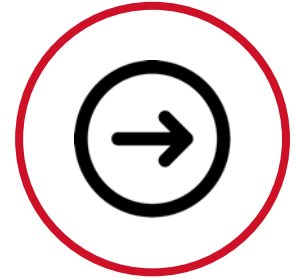
## Understand

*"Help me better understand the client / student experience."*



## Improve

*"Help me explore ways to improve the client / student experience."*



## Act

*"Help me start making a difference and measure the impact of my efforts."*



# What's in the Act Section



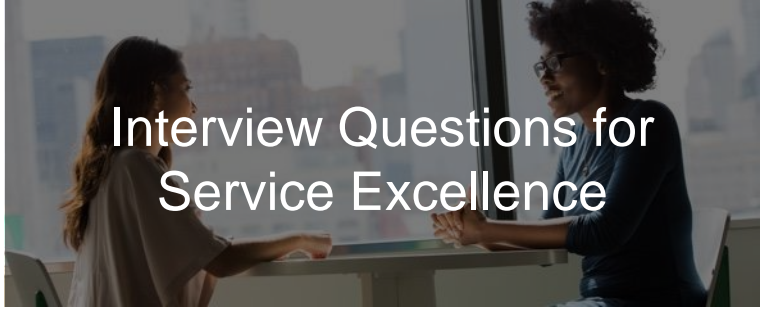
Service Scripting  
Guides



Individual Development  
Cheat Sheet



Team Performance  
Cheat Sheet



Interview Questions for  
Service Excellence

# Next Steps After The Session



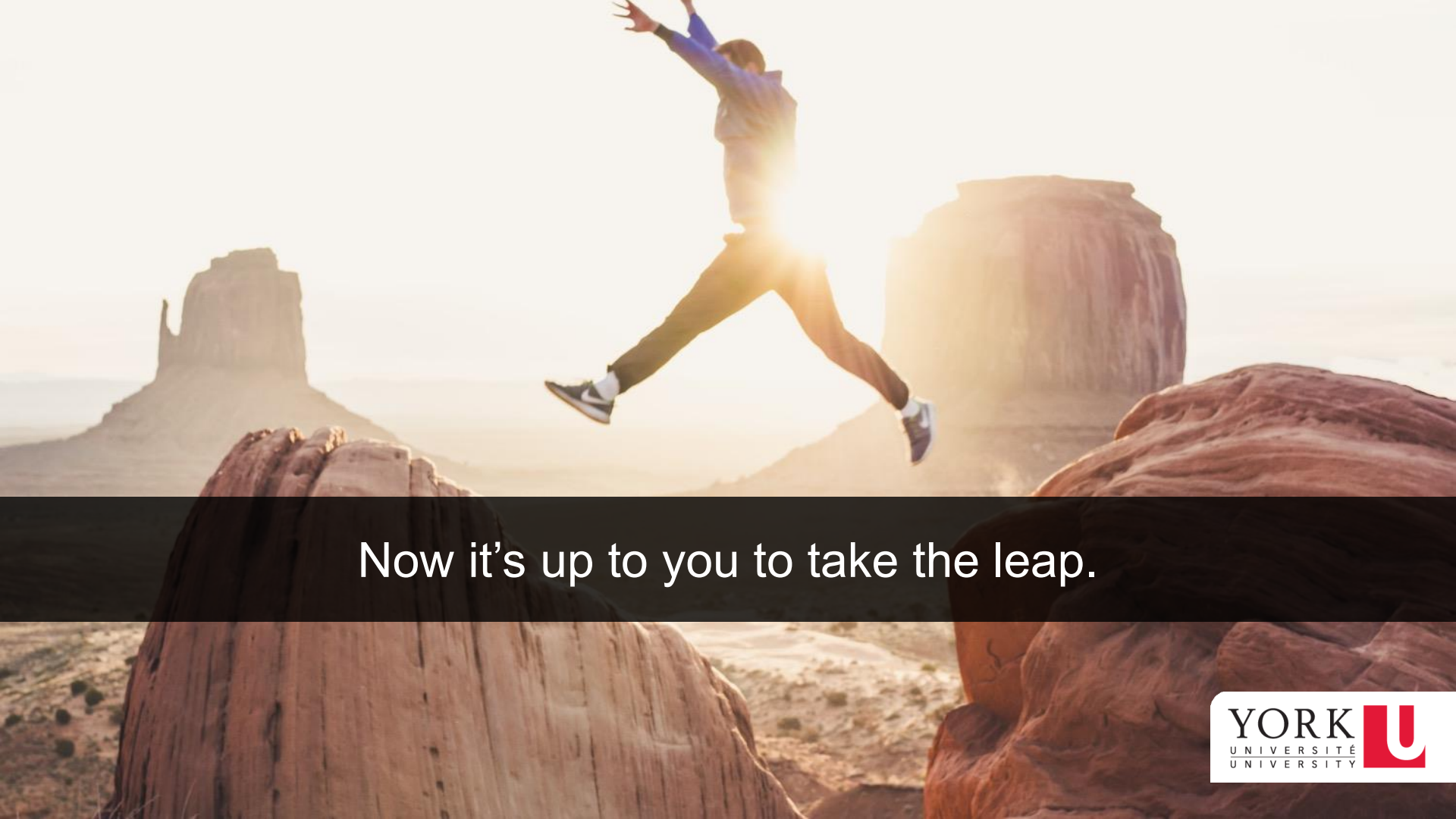
Provide your  
feedback



Send us your  
concept template



Receive your  
certificate

A person is captured mid-jump, leaping over a gap between two large, reddish-brown rock formations in a desert landscape. The sun is low on the horizon, creating a strong backlight effect and a warm, golden glow. The person is wearing a light-colored jacket, dark pants, and sneakers. The background shows more desert rock formations under a clear sky.

Now it's up to you to take the leap.

# The Future of Service Excellence in the Division of Students





# Thank you!

## *Questions?*

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