

Self-assessment by Beatrice Wan

SUBMITTED ON 20 MAY 2023



A summary about me:

I am a Service Design Associate Director at EY design studio Canada, leading the service design practice. With 9 years of experience in customer research and service design, I excel in utilizing consumer insights to drive product innovation while aligning with business objectives and technology capabilities. Before my current role at EY design studio Canada, I worked at EY Hong Kong and EY-Seren in the UK, where I led international teams on diverse projects across the USA, EMEA, and Asia. My experience in managing and collaborating with global teams underscores my ability to drive successful outcomes in multicultural and cross-functional environments.

I currently work as a/at:

Service Design Associate Director at EY design studio Canada

https://studio.ey.com/en_ca/

My LinkedIn profile:

<https://www.linkedin.com/in/beatricekywan/>

My social media channels:

N/A

My educational background:

2021 - 2022 MASTER OF BUSINESS ADMINISTRATION – Hult International Business School

2011 - 2014 BACHELOR OF INTERNATIONAL BUSINESS AND CHINESE ENTERPRISE – The Chinese University of Hong Kong

The following theories are the key components of my approach to service design:

Design Thinking: Design thinking is a human-centered approach to problem-solving and innovation. It involves empathizing with users, defining their needs, generating ideas, prototyping, and testing solutions. This theory is highly relevant in service design as it encourages designers to adopt a user-centric mindset, continuously iterate and improve services based on user feedback, and involve stakeholders throughout the design process. Design thinking promotes a collaborative and iterative approach to service design, ensuring that solutions meet the actual needs of users.

Service Blueprinting: Service blueprinting is a visualization technique that maps out the end-to-end process of delivering a service, including both customer-facing and behind-the-scenes activities. It helps identify potential bottlenecks, pain points, and areas for improvement in the service delivery process. This theory is relevant in service design as it enables designers to understand the interdependencies between different elements of the service and make informed decisions to enhance its efficiency and effectiveness.



These are the most relevant resources I base my work on and I recommend them as a body of knowledge in service design:

"This is Service Design Thinking" by Marc Stickdorn and Jakob Schneider: This book provides a comprehensive introduction to service design principles, methods, and case studies. It offers practical tools and techniques for implementing service design projects and is often regarded as a foundational resource in the field.

"Service Design: From Insight to Implementation" by Andy Polaine, Lavrans Løvlie, and Ben Reason: This book explores the entire service design process, from research and insights to ideation, prototyping, and implementation. It delves into various service design methods and approaches, making it a valuable resource for both beginners and experienced practitioners.

"Mapping Experiences: A Guide to Creating Value through Journeys, Blueprints, and Diagrams" by Jim Kalbach: This book focuses on different mapping techniques, including customer journey mapping and service blueprinting. It provides practical guidance on how to visually represent and analyze service experiences, making it a valuable resource for designers interested in understanding and improving customer interactions.

I have X years of working experience in service design:

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My working experience in service design includes involvement in:

- Service design projects
- Service design consultancy
- Service design training

I have particular experience in the following service sectors:

Financial Services, Mining

I have conducted X service design projects that aim at creating improvements or innovations within organisations:

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These are the service design projects I have successfully delivered:

Service Design Capability Building – An international bank (2022-2023)

- Established a robust Service Design framework, encompassing user research methodologies, design thinking principles, and customer journey mapping techniques, to drive customer-centric innovation and enhance service offerings across multiple banking channels
- Led cross-functional teams in conducting comprehensive user research and analysis, uncovering pain points and opportunities for service improvement, and translating insights into actionable strategies for enhanced customer satisfaction and operational efficiency
- Collaborated closely with key stakeholders, including executives, product managers, and technology teams, to align service design initiatives with business objectives, ensuring seamless integration with existing processes and technological capabilities
- Conducted training sessions and workshops to educate employees on service design methodologies, empowering them to contribute to customer-centric initiatives and cultivating a customer-focused mindset across the organization

Employee Experience Improvement – A Canadian Bank (2021-2022)

- Led a cross-functional team to enhance the employee experience, resulting in a more engaging and productive work environment
- Conducted comprehensive research and analysis to understand employee pain points, needs, and motivations, collaborating closely with employees from various departments and levels
- Developed innovative solutions and streamlined processes based on user-centered design principles, resulting in increased efficiency, job satisfaction, and employee engagement
- Implemented pilot programs, gathered feedback, and made data-driven adjustments to continuously optimize the employee experience, ultimately improving productivity and organizational outcomes

End-to-end Experience Design from scratch - A newly set up virtual bank in HK (2020-2021)



- Conducted focus groups and interviews to understand needs and comments regarding to the current service and pain points for the banking services in HK
- Worked with the senior management to define the target customer groups, customer proposition and product roadmap based on the customers' research results and personas
- Designed the end-to-end customers journeys (including on-boarding, deposit and loan application etc.) with the technical enablers and the operational processes
- Designed the user experience of the virtual banks app and worked with vendor on the user interface design

Design Thinking and Agile Transformation - A Canadian insurance company (2019-2020)

- Conducted design thinking training session to educate the staffs on the design thinking methodology
- Hand-held with the clients to run the design thinking workshop for their new projects
- Designed the agile running model which cater for the needs of the company
- Conducted agile training for different groups of clients (e.g. IT, business and project management team etc.)

Customer Journey Development - One of the largest commercial banks in China (2019-2020)

- Conducted interviews with the target customer group to understand needs and comments regarding to the current service and prioritized the pain points based on the degree of severity
- Brainstormed customer journey improvement solutions using design thinking methodology and presented to the key stakeholders
- Performed a hand-held pilot phase with the clients to train them how to work on the solutions proposed to improve the customer experience

Customer-led Research - A global wealth management firm (2018-2019)

- Performed local market competitor review to understand trends in customer experience across a range of industries to find inspiration for ground-breaking design thinking
- Conducted workshop with key stakeholders gather existing knowledge and insights from across the client's business and engage internal stakeholders to lay the foundations for a successful engagement
- Conducted face to face business / wholesale and distribution partner interviews on customer needs and behaviours, current goals, operators and methods

I have provided service design training sessions and/or other educational experiences for X years:

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My philosophy as a trainer is:

Clear learning objectives, an interactive and hands-on approach, diverse learning methods, real-world examples, collaboration among participants, expert facilitation, ongoing support and resources, and evaluation and feedback characterize successful service design training sessions.

Firstly, clear learning objectives provide a focused direction for the training session, ensuring participants understand the specific skills and knowledge they will gain. Secondly, an interactive and hands-on approach engages participants through group work, case studies, and simulations, allowing them to apply service design methods and tools.

Using diverse learning methods accommodates different learning styles and maintains engagement. Real-world examples and case studies illustrate the practical application of service design principles, inspiring participants and providing valuable insights.

Encouraging collaboration and cross-disciplinary teams mirrors the multidisciplinary nature of service design projects, fostering diverse perspectives and teamwork. Expert facilitation by experienced practitioners or trainers guides discussions, provides feedback, and creates a safe learning environment.

Ongoing support and resources beyond the training session, such as reference materials and follow-up sessions, enable participants to continue their learning journey and apply their knowledge effectively.



Lastly, evaluation and feedback mechanisms gather insights on participants' learning outcomes and suggestions for improvement, facilitating continuous refinement of future training sessions.

These are the service design training sessions and/or other educational experiences I've facilitated within the last year:

In December 2021, I conducted a 2-hour introductory Service Design training session for 30 participants at Teck. The session provided an overview of Service Design principles and methodologies, engaging participants in interactive exercises and real-world examples to equip them with foundational knowledge in the field.

I mostly provide my training offerings in the following language(s):

English, Chinese

I mostly provide my training offerings in the following countries/cities:

Canada, Hong Kong

I cover the following topics during my training offerings:

- Definition of service design
- Differentiation of service design to other approaches like design thinking, service marketing and service branding
- Relationship of service design to agile, scrum and lean
- User research/deep customer insights
- Designing and conducting co-creation workshops
- Creativity and ideation processes
- Facilitation skills for service design
- Implementation of service design concepts
- Leadership/management of service design projects
- Building in-house service design capabilities

My training participants typically have the following level of experience:

- Novice (new to service design)
- Fundamental (basic knowledge)

These are my favourite cases I use to inform participants about the impact and value of service design:

When discussing successful service design examples, Starbucks stands out for its clever use of language. The ritual of ordering a "venti" or a "grande" latte adds a touch of sophistication, elevating the experience beyond simply asking for a "small" or a "large" size. This intentional linguistic choice, reinforced by baristas, creates a sense of being transported to another place, even if just for a moment. Starbucks' historical success is a testament to the loyalty they have built among their core customer segments.

Uber is another compelling example, not just for its app but also for the overall driver experience. From the car you sit in to personalized offerings like bottled water or magazines, Uber allows drivers to personalize the service. It's a layered service design approach, with some centralized elements and constraints, while other aspects are decentralized and left to the discretion of individual drivers.

Food delivery services provide yet another illustration of service design. The ecosystem involves consumers, online ordering platforms, delivery personnel, restaurants, kitchens, and loyalty programs, all working together to encourage repeat engagement. This highlights the fundamental principle that if you want to sell to someone more than once, you are essentially in the service business. In the digital age, service design perspectives can be applied to almost everything, offering new insights and approaches.

Recently, I have been working on developing Go to Market (GTM) materials for EY Design Studio, specifically focused on service design. One of our challenges is effectively framing service design for a new audience in a concise manner that sparks conversations. To address this, I have



been collecting relevant articles to build a compelling case for service design tailored to our prospective clients.

Here are some valuable links that I found relevant to my GTM project:

Article Link 1: "Service Design 101" (<http://www.practicalservicedesign.com/service-design-101>) provides key terms that can be useful for grounding the language of service design in a presentation or slide.

Article Link 2: "This is Service Design and Why It Matters" (<https://www.oreilly.com/library/view/this-is-service/9781491927175/ch01.html>) offers solid insights into the business value of service design and the underlying reasons for adopting a service design approach.

Article Link 3: "5 Advantages of Service Design" (<https://discover.academyxi.com/blog/5-advantages-of-service-design/>) highlights how service design introduces necessary constraints to foster collaboration while remaining grounded in research and adaptable for anyone to participate in achieving positive outcomes.

Article Link 4: "What's Service Design and Why Does It Matter?" (<https://uxdesign.cc/whats-service-design-and-why-does-it-matter-5025ca624f2>) emphasizes that service design does not exist in isolation but addresses complexity to improve experiences across technologies and business silos.

Article Link 5: "Service Design 101" (<https://www.nngroup.com/articles/service-design-101/>) provides practical examples and simple explanations, making it a great resource for defining service design in an understandable way.

These articles serve as valuable resources for understanding service design concepts, business value, practical examples, and defining service design in a clear and accessible manner.

These are the service design methods and tools that I use during my sessions:

Here are some key service design methods and tools that I use during my sessions and their relevance:

Customer Journey Mapping: This method involves visualizing and understanding the end-to-end customer experience across various touchpoints. It helps identify pain points, opportunities for improvement, and moments of delight. Customer journey mapping allows for a holistic view of the customer experience, enabling designers to identify gaps and design interventions to enhance customer satisfaction and loyalty.

Service Blueprinting: Service blueprinting is a tool that helps map out the underlying processes, activities, and interactions that contribute to the delivery of a service. It provides a clear understanding of the front-stage and back-stage elements, as well as the role of different stakeholders. Service blueprinting facilitates the identification of service bottlenecks, areas for optimization, and opportunities to streamline operations for better service delivery.

Persona Development: Personas are fictional representations of typical users or customers, based on research and insights. They help bring user needs and motivations to life, making them relatable for the design team. Personas enable designers to empathize with users, make informed design decisions, and create user-centered solutions that address specific user needs.

Co-creation Workshops: Co-creation workshops involve bringing together stakeholders, customers, and design team members to collaborate on ideation and solution development. These workshops foster creativity, collective problem-solving, and cross-functional collaboration. Co-creation workshops allow for diverse perspectives to be shared, leading to innovative service design concepts and fostering a sense of ownership and buy-in from participants.

Prototyping and Testing: Prototyping involves creating tangible representations of service concepts or solutions, allowing for early feedback and iteration. Prototypes can take various forms, such as physical mock-ups, digital interfaces, or even role-playing scenarios. Testing these prototypes with users helps validate ideas, uncover usability issues, and refine the service design before full-scale implementation. Prototyping and testing ensure that the final service meets user needs effectively.



Stakeholder Mapping and Analysis: Stakeholder mapping helps identify and understand the various individuals or groups that have an influence on or are impacted by the service. This method assists in identifying key stakeholders, their roles, interests, and potential collaboration opportunities. By mapping stakeholders, designers can develop strategies for effective communication, engagement, and collaboration throughout the service design process.

Service Safaris and Ethnographic Research: Service safaris involve immersing oneself in real-life service experiences as a way to observe, learn, and gather insights. Ethnographic research methods, such as in-context observations and interviews, provide deep insights into users' behaviors, needs, and pain points. These methods offer valuable qualitative data that informs the design process, helping designers uncover unmet needs and design solutions that truly resonate with users.

These service design methods and tools are essential for understanding users, mapping the service ecosystem, fostering collaboration, generating ideas, prototyping, testing, and ensuring that the final service design meets user needs and business objectives. By employing these methods effectively, service designers can create meaningful and impactful experiences for users.

After successfully attending my training sessions, participants will typically be able to:

After successfully attending my training sessions, participants will typically be able to:

Understand the core principles and concepts of service design: Participants will gain a solid understanding of the fundamental principles, methodologies, and approaches used in service design. They will grasp the importance of user-centered design, empathy, and the holistic view of the service experience.

Apply service design methods and tools: Participants will be equipped with practical skills to apply various service design methods and tools. They will learn how to conduct customer journey mapping, create personas, facilitate co-creation workshops, prototype and test service concepts, and effectively use stakeholder mapping and analysis techniques.

Identify user needs and pain points: Participants will develop the ability to identify and empathize with user needs and pain points. They will learn how to conduct user research, gather insights, and analyze data to gain a deep understanding of user behaviors, motivations, and expectations.

Generate innovative service concepts: Participants will learn creative ideation techniques and approaches to generate innovative service concepts. They will be able to think outside the box, challenge assumptions, and develop unique solutions to address user needs and improve the overall service experience.

Collaborate effectively in cross-functional teams: Participants will enhance their collaboration and communication skills, particularly within cross-functional teams. They will understand the value of diverse perspectives and learn how to foster collaboration, facilitate effective workshops, and engage stakeholders throughout the service design process.

Prototype, test, and iterate service solutions: Participants will learn how to rapidly prototype service concepts and test them with users. They will understand the importance of feedback and iteration in refining and improving service solutions, ensuring that they meet user needs and business objectives.

Drive customer-centric innovation: Participants will develop a customer-centric mindset and the ability to drive customer-focused innovation within their organizations. They will be able to advocate for the importance of service design, communicate its value, and champion user-centered approaches in their work.

By achieving these outcomes, participants will be well-equipped to apply service design principles and methodologies in their projects, leading to improved service experiences, enhanced customer satisfaction, and business success.

I apply the following evaluation tools to make sure the participants have understood the content of my sessions and



gained the expected competencies and skills:

written test

I systematically evaluate and improve my offerings based on feedback. These are examples of feedback that have led to improvements:

Participant Surveys: I collect participant feedback through surveys after each training session. This allows me to gather their perspectives on the training's content, delivery, and overall experience. I carefully review the feedback and identify common themes or areas for improvement. Participants mentioned that they would like more interactive exercises. I incorporated more hands-on activities in future sessions to enhance engagement.

I have participated in the following service design-related activities in order to stay up to date, share my experiences with peers and receive their supervision within the last 12 months:

- SDN Global Conference

I actively support the local or national service design community through:

Support the presentation in VanUX 2023 talking about how to collaborate between service design and UX design

I have participated as a speaker in the following events:

EY People Advisory Academy Conference

Introduction to Design Thinking

Facilitated five sessions of a 75-minute event, with 50 participants in each session, with activities and breakout groups for applying the design thinking process to reimagine employee experience, change management, and organizational change. The audience was management consultants (i.e., non-designers).

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