Transforming an Organization through Service and Space Design Strategy

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Transforming an Organization through Service and Space Design Strategy

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Rachel Vacek, Head of Design & Discovery
University of Michigan Library

Designing for Digital
March 7, 2018
Hello!

Emily Puckett Rodgers
Head of Library Environments

Meghan Sitar
Director of Connected Scholarship

Rachel Vacek
Head of Design and Discovery

Operations

Learning & Teaching

Library IT


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And special thanks to Jessie Sher, Project Coordinator.
Today, I’ll discuss

● Our engagement with brightspot strategy
● The formation and work of the Service Design Task Force
● Specific tools and processes we’re using in the resulting service design teams
Spaces & Services
Strategy Development
Progress

Hatcher-Shapiro Library organizational visioning and space programming

Fall 2016-Winter 2017

Executive Council review of report

Summer 2017

Service Teams formed and charged with co-creating service design for plays
Why Now?

- Take a strategic approach to physical space planning
- Create welcoming, accessible, safe buildings and services
- Transform organizational culture


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Why brightspot?

spaces

services

organization


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Deliverables

**Strategy Report**
Space and Service Principles, Philosophy, Framework

**Playbook**
Flexible scenarios to consider piloting/prototyping guidance

**Research Report**
User research conducted by the team


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Strategy Report: Our Service Philosophy & Framework Drives Our Next Steps

- Promote organizational change
- Experiment with service teams
- Transform spaces to improve the user experience

Space and Service Principles

1. **Enhance the Platform for Discovery** through foundational changes to physical and digital space usability, access, and navigation.

2. **Accelerate Partnerships in Scholarship** by engaging with library users and working them throughout the service experience.

3. **Deliver as One Library** with a shared service philosophy and improved library staff workspace.

Progress

Hatcher-Shapiro Library organizational visioning and space programming

Fall 2016-Winter 2017

Service Design Task Force formed and charged

Fall 2017

Executive Council review of report

Summer 2017
Fall 2017 Activities

Champions Workshop with Library Staff

Bicentennial Library of the Future Design Challenge with Students
Challenges

- Building a bridge from virtual to physical
- Moving from collections-centric to people-centric services & spaces
- Engaging leadership in a large, complex organization
- Using the physical locations on central campus to influence the library’s organizational culture library-wide
- Creating a shared understanding of the context for the work and communicating goals
Recommendations, Service Teams, and Plays


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**Strategy Report**
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User research conducted by the team
Path forward

- brightspot research report
- brightspot plays as hypotheses of needed action
- service design teams test hypotheses with deep dives and pilots / prototypes
- new services and spaces implemented and continually assessed

brightspot strategy report as a tool to keep this work aligned to service philosophy and space & service principles
Recommendation #1: Continued Adoption and Integration

At the leadership level, continue to embed the service philosophy in the work of divisions, with a focus on diffusing these principles for good service into continuing work.
Recommendation #2: Identified Priority Plays

Activate three service teams focused on deep dives and pilot/prototyping work around three plays identified in the Hatcher-Shapiro Library Service and Space Strategy Playbook:

- Digital Scholarship Lab
- Consultation Hub
- Staff Innovation Hub
Recommendation #3: Non-brightspot Mini-Play

Apply the same principles of service design and service teams to the problem of citation management services.
Recommendation #4: Library as Research Lab Play - Research Scholars Hub

The Service Design Task Force will partner with the Shapiro Design Lab’s Library Lab to guide graduate students working under the IMLS Library as Research Lab project, using the Research Scholars Hub play as an area for design work in the Design Thinking for Library Services Lab.
Example

- brightspot research on graduate students
- brightspot proposes the Research Scholars Hub play based on findings
- service design team studies more grad students and develops pilots / prototypes to test ideas for new services
- new graduate student services and spaces designed, implemented, assessed, and iterated upon in response to emerging needs

brightspot strategy report as a tool to keep this work aligned to service philosophy and space & service principles
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Priority Play Service Teams and Design Sprints

Purpose
Align related **expertise** from across divisions into a **collaborative group** that can more seamlessly design and deliver services for our users, accelerating our ability to partner in scholarship and deliver services as **one library**.

Membership
1 Service design partner
2 Co-leads
3-5 Additional members

Sprint Duration
16-19 weeks (May or June)
Expected Service Team Approach

Deep Dives, Pilots, and Prototypes

- **Deep dive** research studies are areas for intense study.

- Deep dive studies will inform **pilot and prototype** opportunities.
Play #1 Consultation

Service Design Partner: Meghan Sitar

“A one-stop shop for consultations with Library experts and partners, including topical and functional research and writing help.

Users can get advice on research planning and coursework in shared drop-in rooms for private consultations and flexible meeting spaces to accommodate small groups.

Provide access to library expertise in person and remotely as well as creating a sense of access through visibility and transparency (where appropriate).”

Playbook p. 47
Play #2 Digital Scholarship

Service Design Partner: Rachel Vacek

“Leading the great research library in the digital era, the lab is an active place for community of practices to form with cutting-edge technology for the presentation, visualization, and manipulation of data-driven research.

A collection of instruction spaces, a visualization lab, a data center, and access to expertise to empower all scholars with confidence working with data and digital learning.”

Playbook p. 48
Play #3 Staff Innovation

Service Design Partner: Emily Puckett Rodgers

“A destination for staff to pilot initiatives, develop ideas, and communicate work being done internally.

A collaborative workspace for interdisciplinary staff teams to support ideas from proposal to trial initiative to formal service offering.

Supports innovation and experimentation within the library organization and provides a model for testing ideas from proposal to implementation, while also engaging the community.

Empowers staff to own service experiences with agency and accountability.”

Playbook p. 55
Process
Our Approach to Service Design

Exploring Issues
- Dive into issues from diverse perspectives against different time considerations

Analysis
- Clarify what is important to who and why

Generating & Exploring Ideas
- Create and explore alternatives from different perspectives

Synthesis
- Define how to explore implications of new concepts and build knowledge

Next 16-19 weeks
The Service Innovation Handbook

Lucy Kimbell, 2015

Method 2: Visualizing drivers of change

Purpose
Using this method helps a team identify the drivers of change. It helps them shape the issue it plans to address. It helps a group articulate reasons why a service innovation initiative might be necessary, and provides detail on what teams members think are the key prompts for change.

Outcomes
A shared view of the drivers of change shaping the context for your issue, service or organization. Conceptualizing the drivers of change grid helps a team see things from different perspectives and supports sense-making and creativity. It also highlights important areas of concern and disagreement and reveals lack of knowledge.

Preparation
Ahead of time, invite an academic, artist or future-lab— or all three—to join the workshop to provoke or inspire you. Alternatively, a couple of days before the workshop, circulate links to videos, articles or blog posts discussing future developments from a range of fields, not just your organization’s core areas.

Add a visual dimension to this method by printing out advance images such as photographs, screen grabs, drawings, and stories that you associate with future developments. Cut them up to be approximatively A4 size.

Tip
While facilitating, push participants towards extremes. Encourage them to associate, imagine and be ridiculous.

continued...
The Hatchery


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Service Design Tools & Their Socialization
Library Experience Lifecycle / UX Toolkit

Toolkit Project Goals

- To compile and present existing user data more deeply and dynamically
- To create additional library-specific tools and resources for envisioning and designing services
- To develop user personas that represent our community in a deeper, more diversified way

This is an IRB Exempt Project.

Two methods

Experience Mapping

“Experience mapping is a strategic process of capturing and communicating complex customer interactions. The activity of mapping builds knowledge and consensus across your organization, and the map helps build seamless customer experiences.”


Personas

“Personas are fictional characters, which you create based upon your research in order to represent the different user types that might use your service, product, site, or brand in a similar way. Creating personas will help you to understand your users’ needs, experiences, behaviours and goals.”

One source of inspiration: U.S. Department of Veterans Affairs

Personas and Life Stages from resources made by the VA Center for Innovation
Example of an experience / journey map

Journey map from the VA Center for Innovation
See also “Toward a Veteran Centered VA” report
Service Delivery Canvas & Service Design Blueprint

Service Delivery Canvas
(adapted from Business Model Canvas)

- **Required Infrastructure:** What infrastructure does our service value proposition require? (e.g., tools, technology, furniture, staffing)
- **Key Partners:** Who are potential key partners? What are our motivations for these partnerships?
- **Service Value Proposition:** For [user], who [motivation], we offer... (user experiences)
- **Pilot Plan:** How might we test this service value proposition in simple, user-centered, flexible, and measurable way?
- **User Profile:** For whom are we creating value? (e.g., undergrad, grad, faculty) What are their current problems? Biggest needs?

Future Service Blueprint

- **Service:** ____________________________
- **User Actions:** ____________________________
- **Channels:** ____________________________
- **Front of House Actions:** ____________________________
- **Back of House Actions:** ____________________________
- **What tools or systems are needed to enable user actions?**
- **Line of visibility**

Direction of service delivery


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Goals and Intentions for these Tools

For Our Staff
● Tangible
● Anyone can use (with some training)
● Large and local application

For Our Organization
● Adaptive and iterative
● User-focused
● Aligns front and back-of-house services
Recap

Tools

Leadership

Service Teams

Thank you!

&

Email Us!

libservicedesign@umich.edu
Appendix: Tools & Resources
# Service Delivery Canvas

(adapted from Business Model Canvas)

<table>
<thead>
<tr>
<th>Required Infrastructure</th>
<th>Key Partners</th>
<th>Service Value Proposition</th>
<th>Staff + User Relationship</th>
<th>User Profile</th>
</tr>
</thead>
<tbody>
<tr>
<td>What infrastructure does our service value proposition require? (e.g. tools, technology, furniture, staffing)</td>
<td>Who are potential key partners? What are our motivations for these partnerships?</td>
<td>For ________ (user) who ________ (motivation) we offer</td>
<td>What type of relationship do our users expect us to establish and maintain? (e.g. personal assistance, self-service, communities)</td>
<td>For whom are we creating value? (e.g. undergrad, grad, faculty) What are their current problems? Biggest needs?</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Next Steps</th>
<th>Pilot Plan</th>
<th>Location (physical + digital)</th>
</tr>
</thead>
<tbody>
<tr>
<td>What do we need to understand in order to implement our service value proposition?</td>
<td>How might we test this service value proposition in simple, user-centered, flexible, and measurable ways?</td>
<td>Where do we deliver our service value proposition to our users? What are its adjacencies?</td>
</tr>
</tbody>
</table>

Directions of service delivery:
- **back of house** (staff ops)
- **front of house** (user-facing)


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Service Blueprint

<table>
<thead>
<tr>
<th>Future Service Blueprint</th>
<th>Service:</th>
</tr>
</thead>
<tbody>
<tr>
<td>user actions</td>
<td></td>
</tr>
<tr>
<td>What does the user see or interact with?</td>
<td></td>
</tr>
<tr>
<td>channels</td>
<td></td>
</tr>
<tr>
<td>What are staff doing to respond to user actions?</td>
<td></td>
</tr>
<tr>
<td>back-of-house actions</td>
<td></td>
</tr>
<tr>
<td>What are staff doing behind the scenes to support user actions?</td>
<td></td>
</tr>
<tr>
<td>tools + systems</td>
<td></td>
</tr>
<tr>
<td>What tools or systems are needed to enable user actions?</td>
<td></td>
</tr>
</tbody>
</table>

TIME

line of visibility
Design Thinking for Libraries

http://designtinkingforlibraries.com/