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2018-03-07

# Transforming an Organization through Service and Space Design Strategy

Vacek, Rachel

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# Transforming an Organization through Service and Space Design Strategy

**Meghan Sitar**, Director of Connected Scholarship  
**Rachel Vacek**, Head of Design & Discovery  
University of Michigan Library

Designing for Digital  
March 7, 2018



<http://bit.ly/UMichD4D>



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# Hello!



**Emily Puckett  
Rodgers**  
Head of Library  
Environments

**Operations**



**Meghan Sitar**  
Director of Connected  
Scholarship

**Learning & Teaching**



**Rachel Vacek**  
Head of Design  
and Discovery

**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



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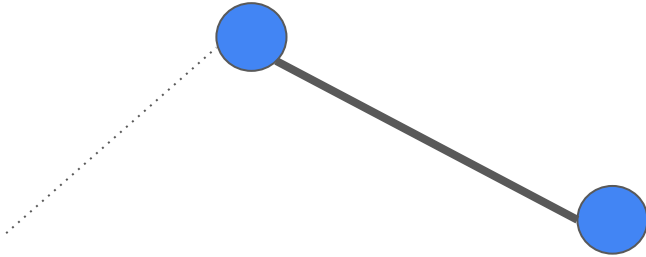
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# Progress

Hatcher-Shapiro  
Library organizational  
visioning and space  
programming

**Fall 2016-Winter 2017**



**Summer 2017**

Executive Council  
review of report

# Why Now?

Take a strategic  
approach to  
physical space  
planning

Create  
welcoming,  
accessible,  
safe buildings  
and services

Transform  
organizational  
culture



# Why **brightspot** ?



# Deliverables

## Strategy Report

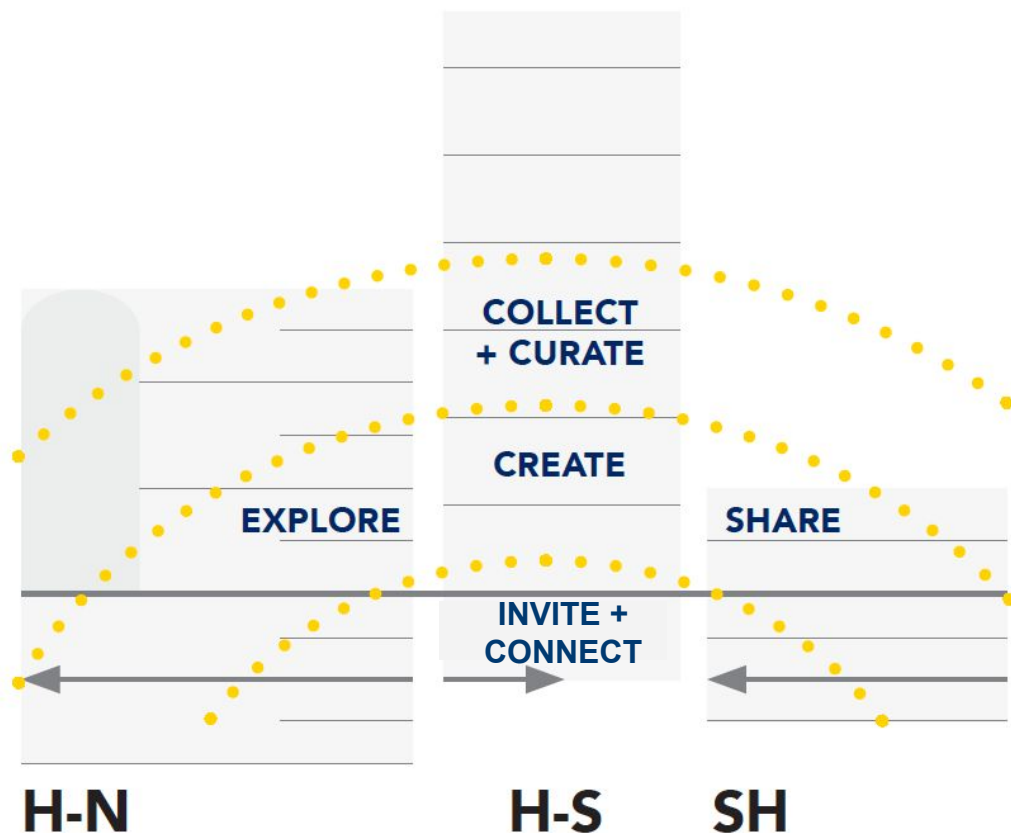
Space and Service Principles,  
Philosophy, Framework

## Playbook

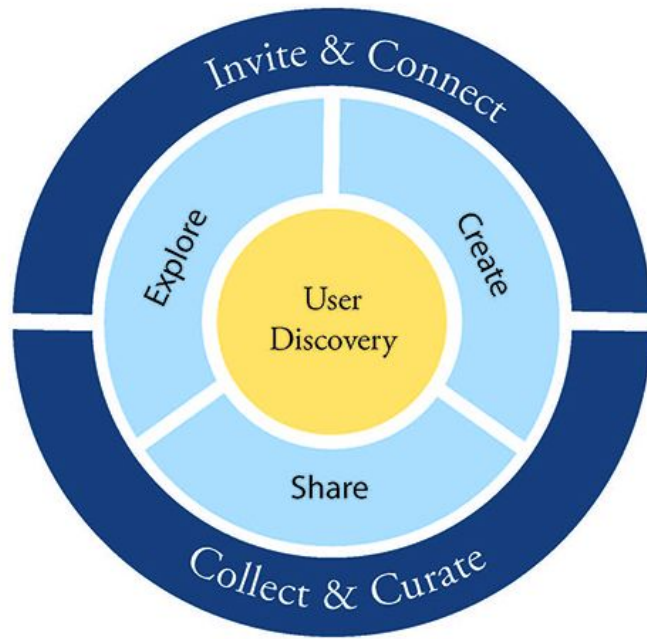
Flexible scenarios to consider  
piloting/prototyping guidance

## Research Report

User research conducted by  
the team



# 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

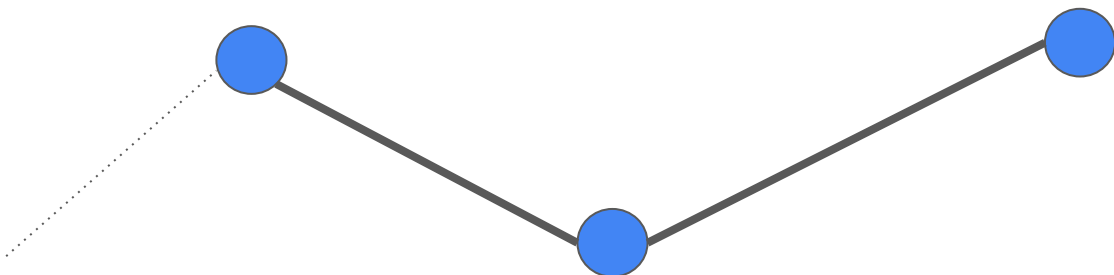
**Fall 2016-Winter 2017**

Service Design  
Task Force formed  
and charged

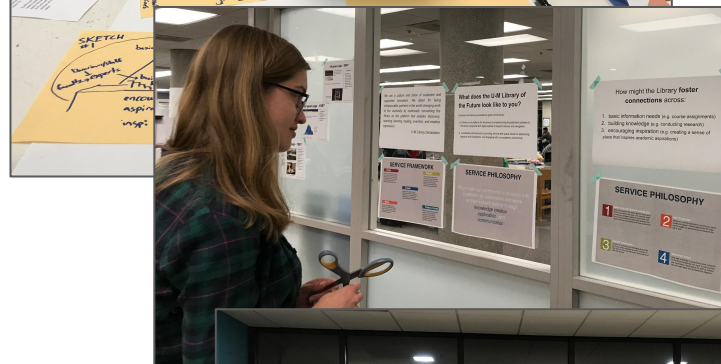
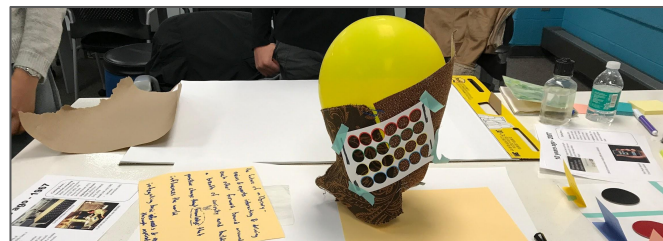
**Fall 2017**

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Executive Council  
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# 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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# Deliverables

## Strategy Report

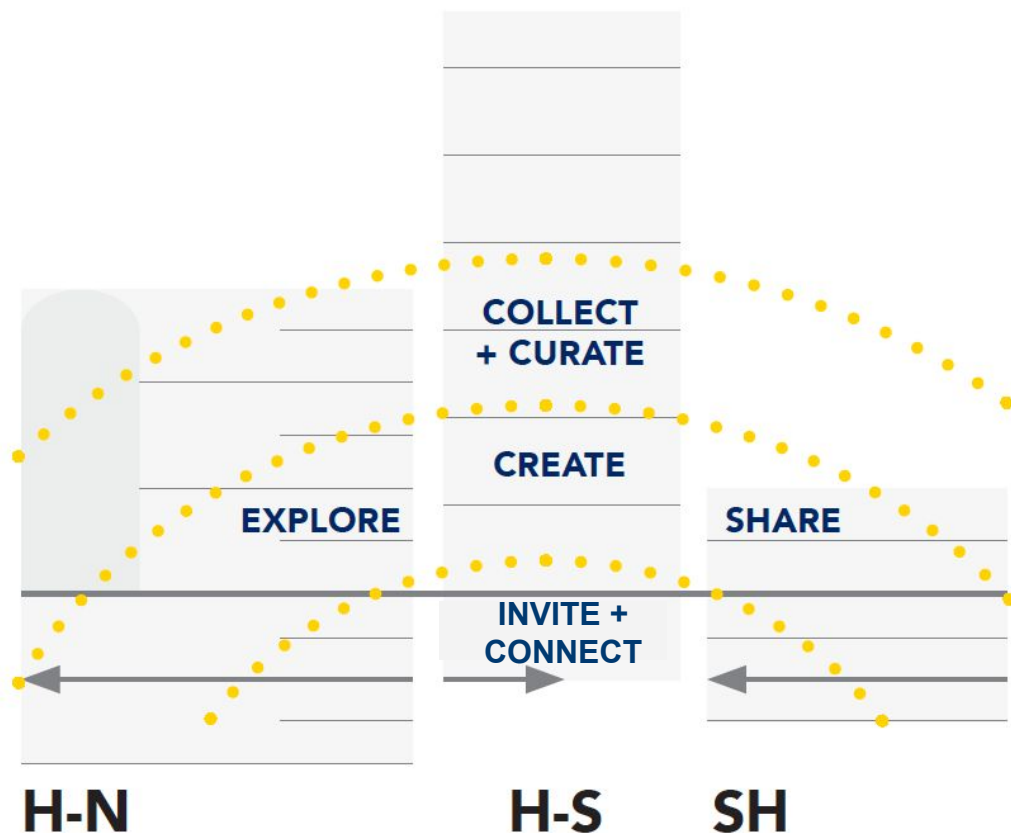
Space and Service Principles,  
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## Playbook

Flexible scenarios to consider  
piloting/prototyping guidance

## Research Report

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

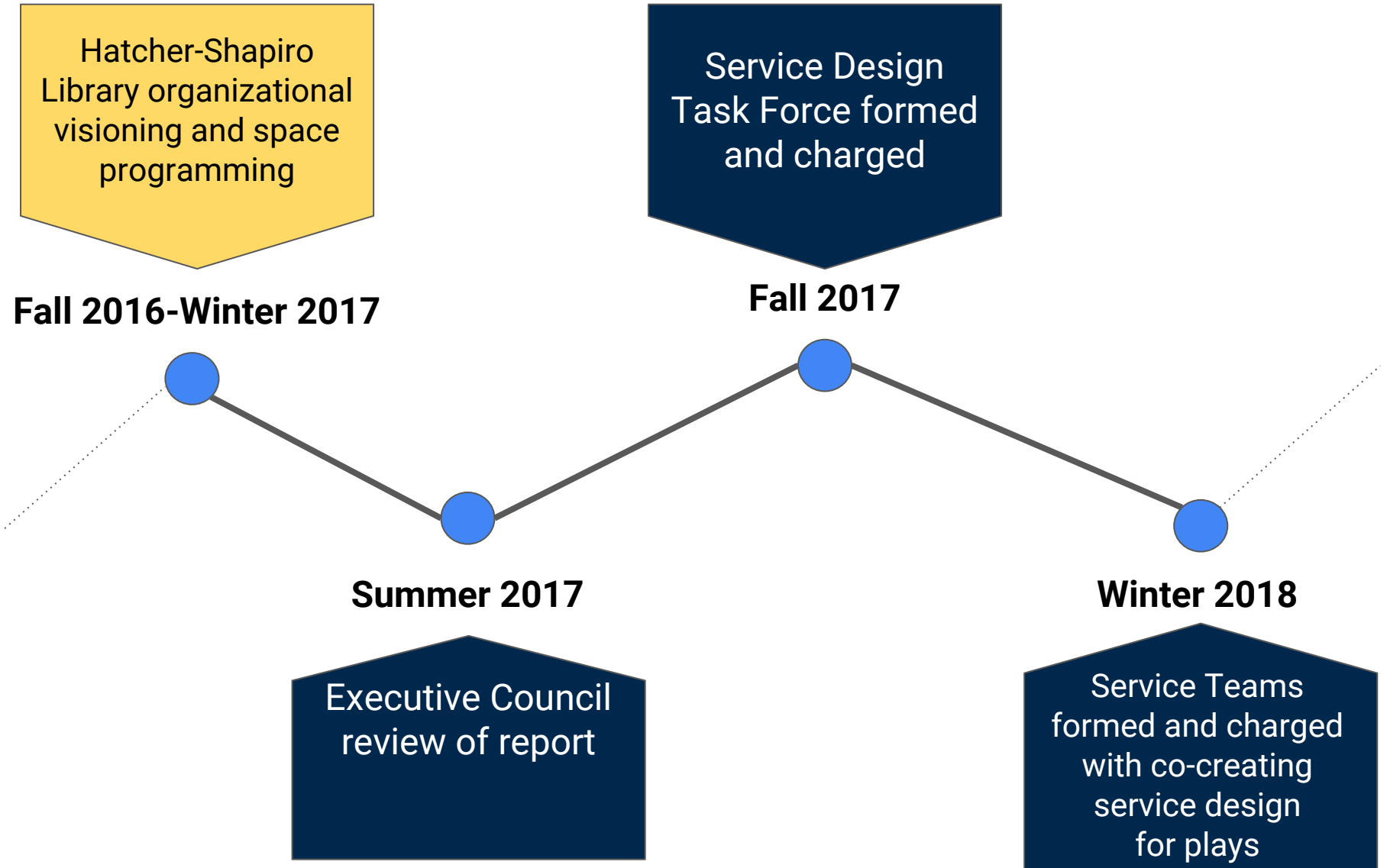
brightspot  
proposes the  
Research  
Scholars Hub  
play based on  
findings

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

# Progress





# 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)



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# 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*



**Accelerate partnerships in scholarship**

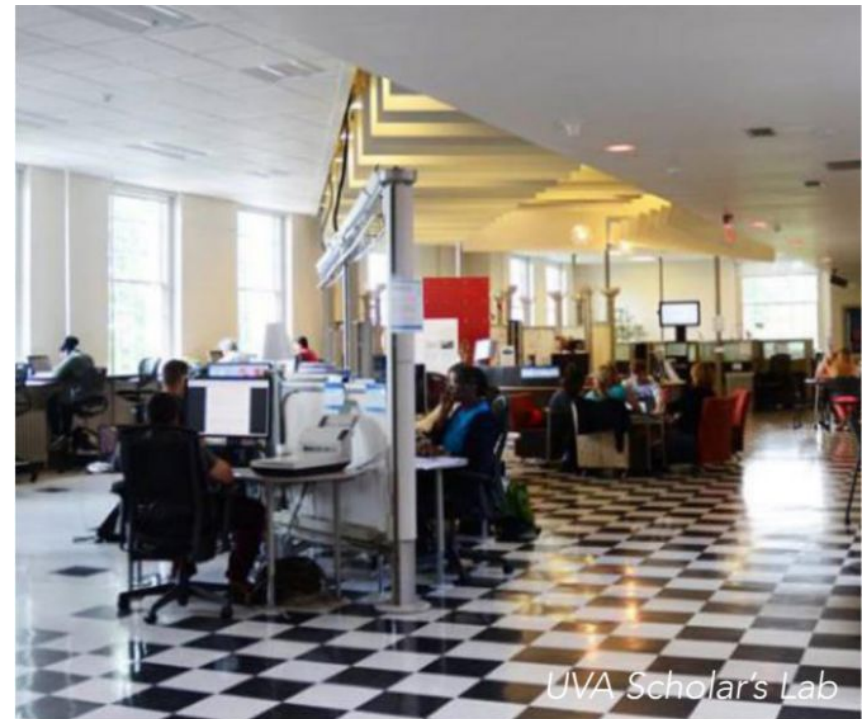
## Play #2 Digital Scholarship

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*



**Accelerate partnerships in scholarship**

## Play #3 Staff Innovation



Deliver as One Library

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



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# Our Approach to Service Design

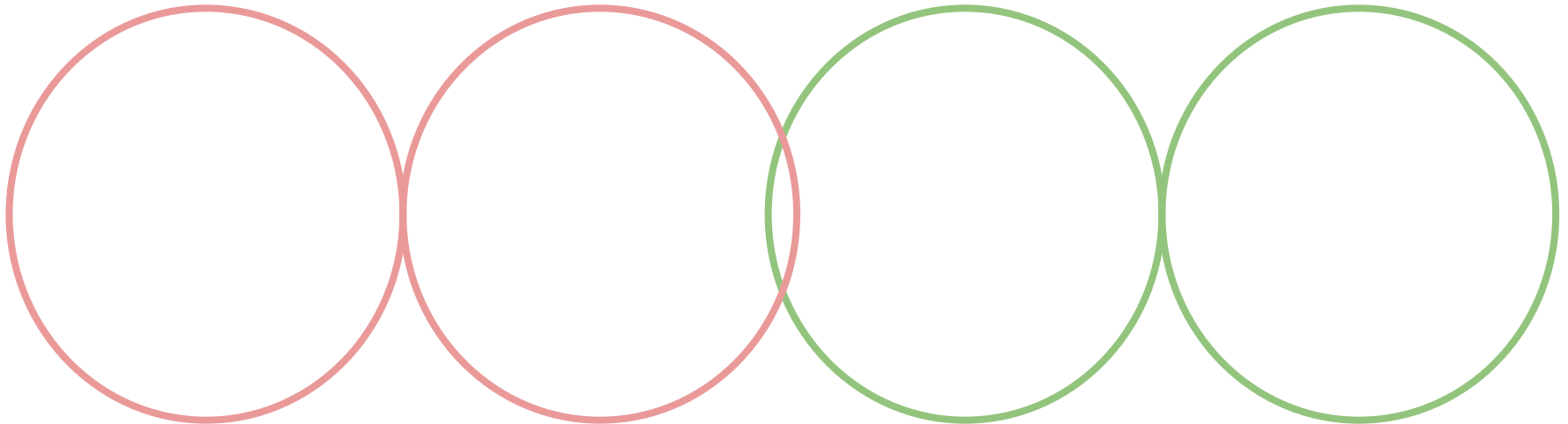
**Exploring Issues**

**Analysis**

**Generating &  
Exploring Ideas**

**Synthesis**

**Next 16-19 weeks**



Dive into issues from diverse perspectives against different time considerations

Clarify what is important to who and why

Create and explore alternatives from different perspectives

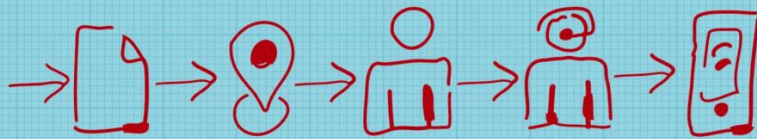
Define how to explore implications of new concepts and build knowledge

# The Service Innovation Handbook

## The Service Innovation Handbook

Action-oriented creative thinking toolkit for service organizations

TEMPLATES – CASES – CAPABILITIES



Lucy Kimbell

Lucy Kimbell, 2015

### Method 2: Visualizing drivers of change

|  |   |
|--|---|
| <b>Time involved</b>                           | Preparation, 10 minutes + optional extras<br>Using the method, 90 minutes                         |
| <b>Associated capabilities</b>                 | Recombine capacities into new innovation ecosystems<br>Increase the variances/bring in new actors |
| <b>Methods to use before or after this one</b> | Method 4 Mapping the user experience<br>Method 10 Telling stories                                 |

**What you'll need**  
Masking tape, Post-it notes, Blu-Tack, marker pens  
A flipchart  
A facilitator to guide the teams  
A documenter to photograph the results



#### key question

*What do you and your team think the future looks like?*

#### Purpose

Using this method helps a team identify the drivers of change it thinks are shaping 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 team 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. Co-creating 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 consensus and disagreement and reveals lack of knowledge.

#### Preparation

Ahead of time, invite an academic, artist or futurist – 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 in advance images such as photographs, screenshots, drawings, and icons that you associate with future developments. Cut them up to be approximately A5 size.

#### Tip

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

2 Contexts, strategies, value creation

continued...



# The Hatchery



# The Hatchery



# The Hatchery



# Service Design Tools & Their Socialization



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# 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.



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# 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.”

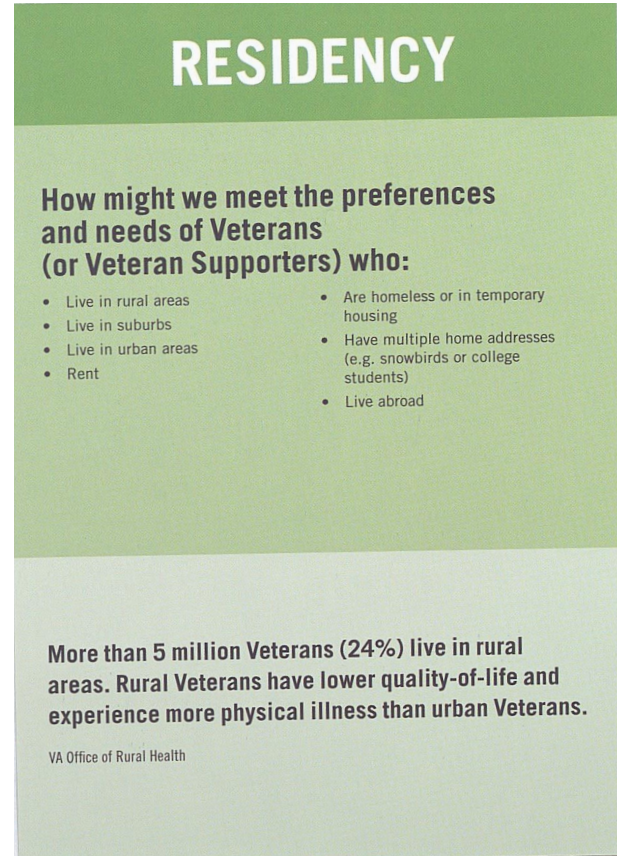
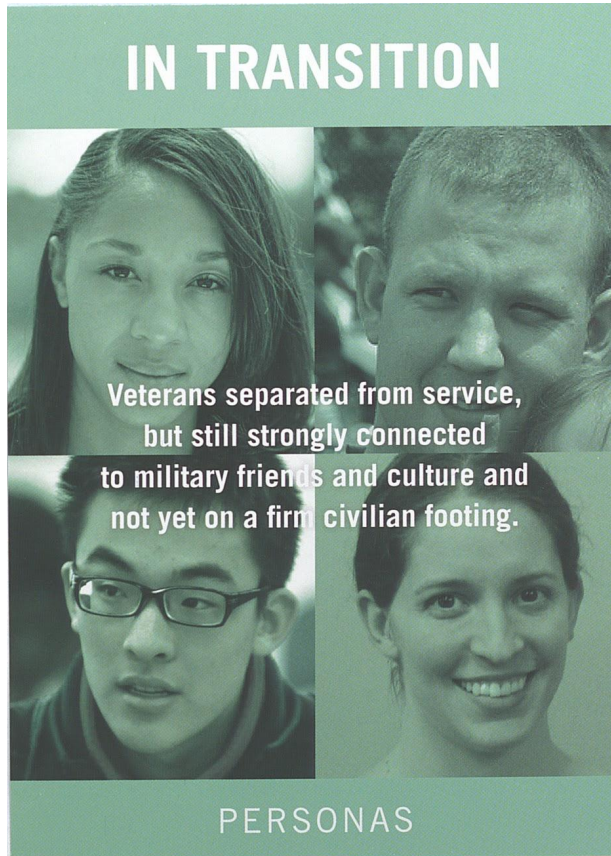
- Adaptive Path,  
<http://mappingexperiences.com/>

## 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.”

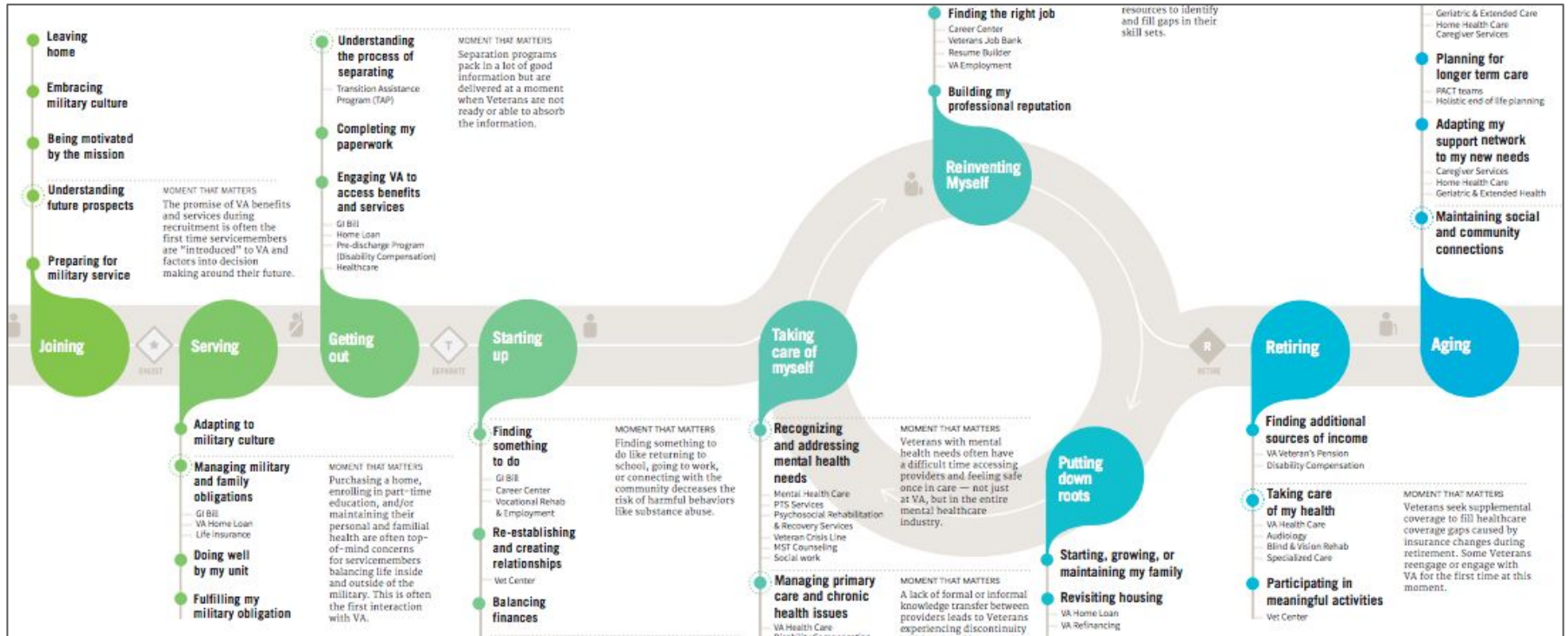
- Interaction Design Foundation,  
<https://www.interaction-design.org/>

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



Personas and Life Stages from resources made by the [VA Center for Innovation](https://www.va.gov/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)

category: \_\_\_\_\_ subcategory: \_\_\_\_\_  
service point: \_\_\_\_\_

|   |   |   |   |   |
|---|---|---|---|---|
| <p><b>3. Required Infrastructure</b></p> <p>What infrastructure does our service value proposition require? (e.g. tools, technology, furniture, staffing)</p> | <p><b>Key Partners</b></p> <p>Who are potential key partners? What are our motivations for these partnerships?</p>                        | <p><b>1. Service Value Proposition</b></p> <p>For _____ (user) who _____ (motivation) we offer _____</p> <p>(list services here)</p> <p>with _____ (unique characteristic) that _____ (benefit)</p> | <p><b>2. Staff + User Relationship</b></p> <p>What type of relationship do our users expect us to establish and maintain? (e.g. personal assistance, self-service, communities)</p> | <p><b>User Profile</b></p> <p>For whom are we creating value? (e.g. undergrad, grad, faculty) What are their current problems? Biggest needs?</p> |
| <p><b>Next Steps</b></p> <p>What do we need to understand in order to implement our service value proposition?</p>  | <p><b>Pilot Plan</b></p> <p>How might we test this service value proposition in simple, user-centered, flexible, and measurable ways?</p> | <p>back of house [staff ops]</p>  |   |   |

Direction of service delivery

**Future Service Blueprint**

Service: \_\_\_\_\_

|                        |   |  |  |  |
|------------------------|---|--|--|--|
| user actions           | What does the user see or interact with?                        |  |  |  |
| channels               | What are staff doing to respond to user actions?                |  |  |  |
| front-of-house actions | What are staff doing behind the scenes to support user actions? |  |  |  |
| back-of-house actions  | What tools or systems are needed to enable user actions?        |  |  |  |
| tools + systems        |   |  |  |  |

line of visibility

TIME →



<http://bit.ly/UMichD4D>



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# Goals and Intentions for these Tools

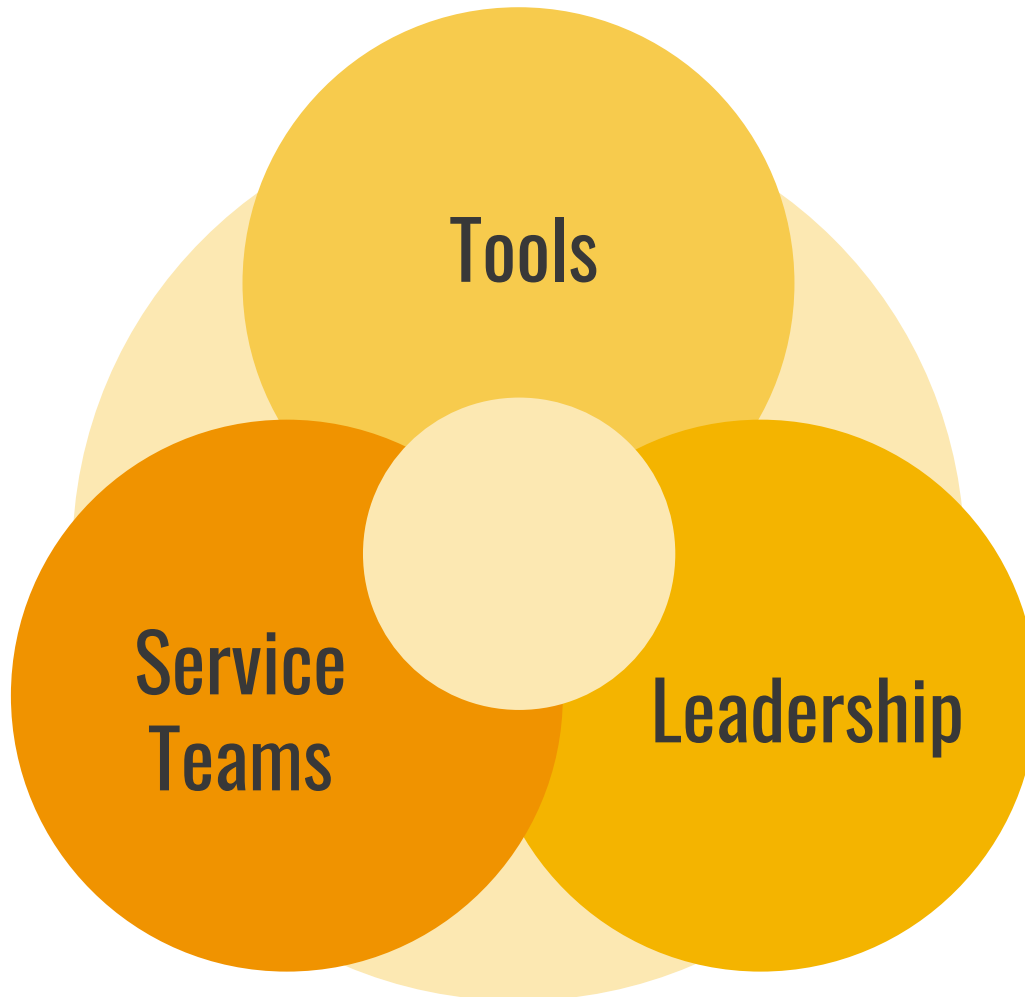
## For Our Staff

- 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



# Thank you!

# &

# Email Us!

[libservicedesign@umich.edu](mailto:libservicedesign@umich.edu)



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# Appendix: Tools & Resources



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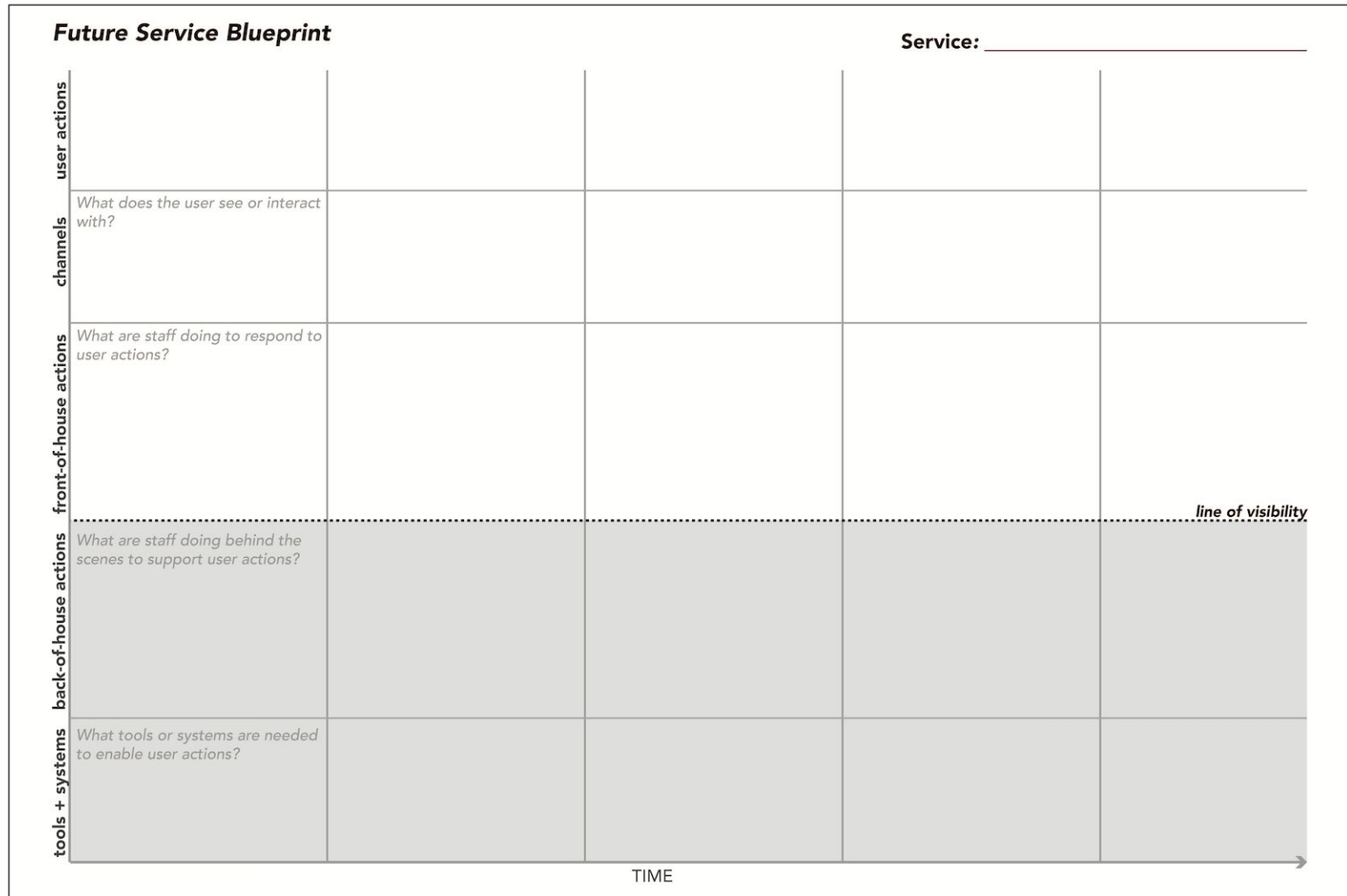
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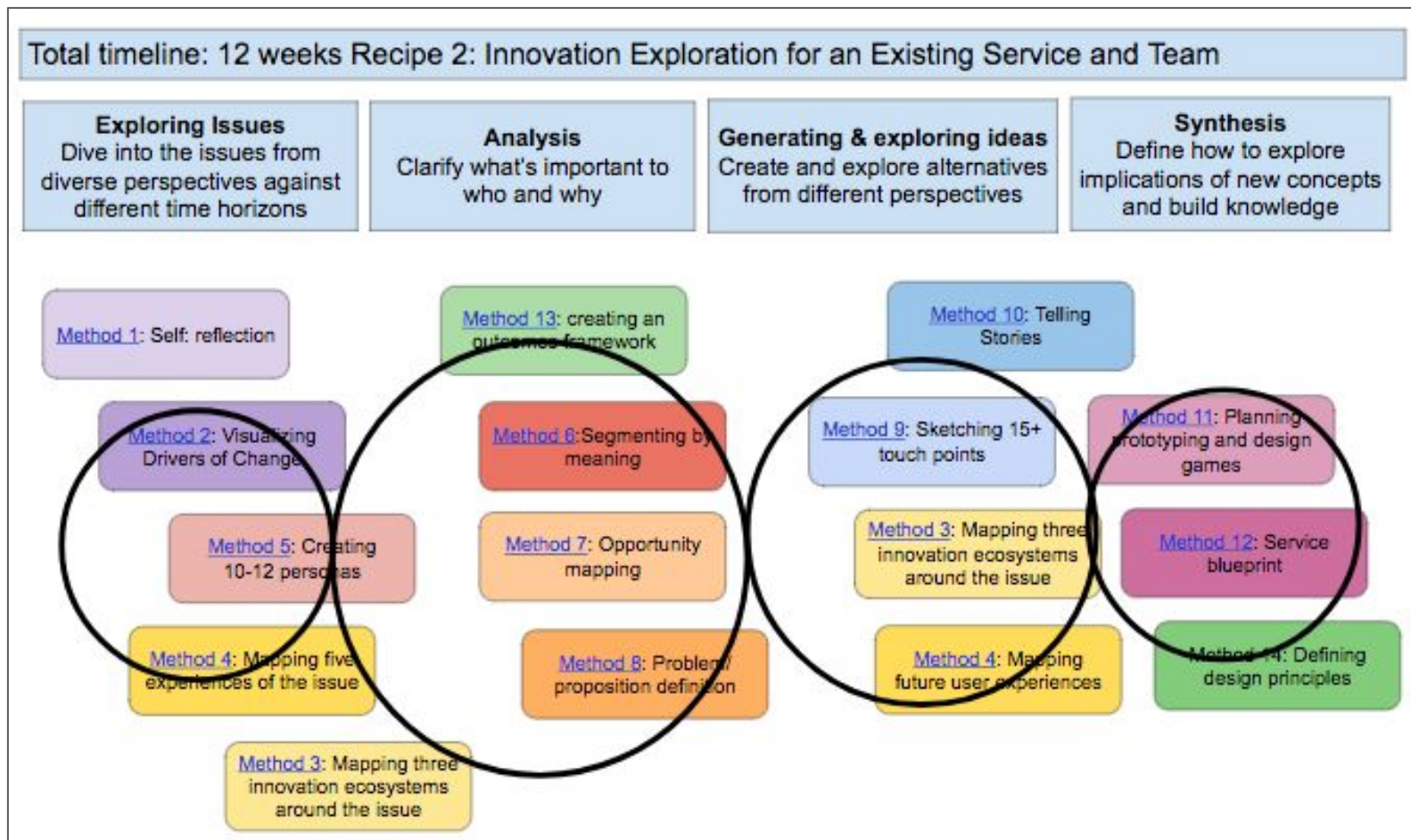
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# Service Blueprint



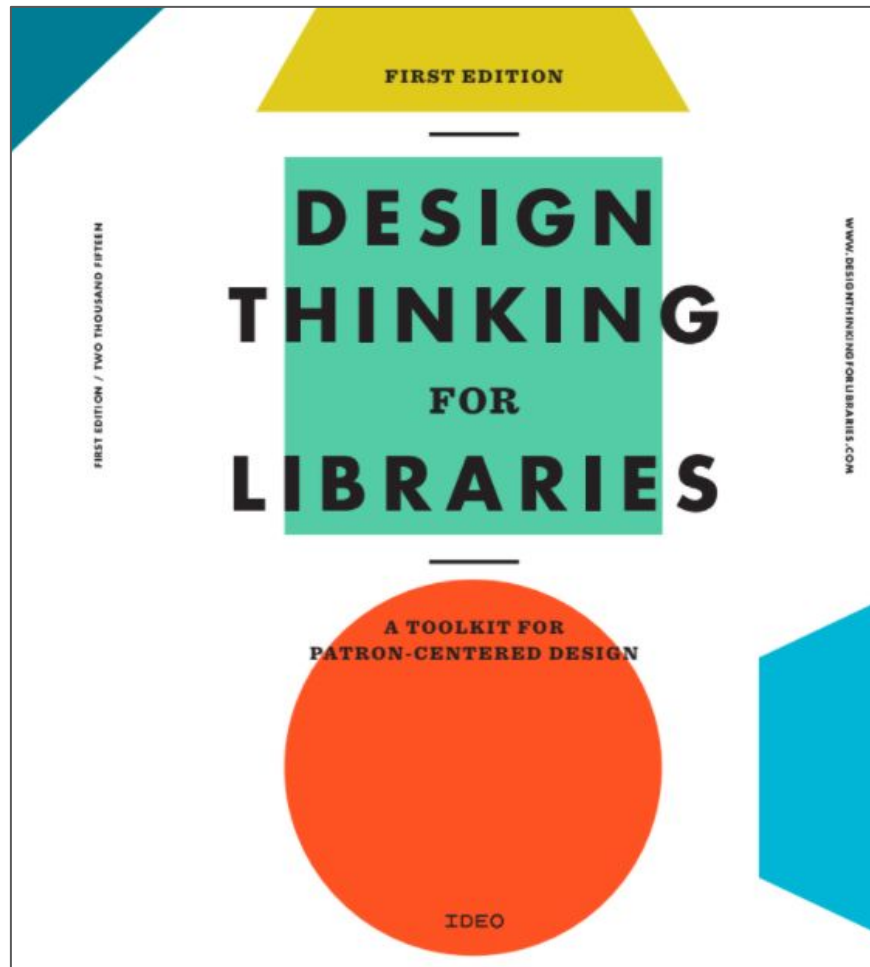
# Service Innovation Handbook, Recipe 2



Recipe 2, from *Service Innovation Handbook* by Lucy Kimbell, 2014, <https://serviceinnovationhandbook.org/>



# Design Thinking for Libraries



<http://designthinkingforlibraries.com/>