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# Designing a Digital Tool Concept for Business-to-Business Dialogue Using a Customer-Centric Approach

# – Case Fazer Food Services

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**Laurea University of Applied Sciences**

# Designing a Digital Tool Concept for Business-to-Business Dialogue Using a Customer-Centric Approach

## – Case Fazer Food Service

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Degree Programme in
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**Abstract**

**Designing a Digital Tool Concept for Business-to-Business Dialogue Using a Customer-Centric Approach — Case Fazer Food Services**

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Due to the wave of digitalisation and increasing competition, companies are desperately searching for new solutions to keep up with change. Technological solutions are being developed to strengthen services and customer relationships, and the need for more efficient communication between the client and the supplier has become even more critical. Yet, solutions are done mostly from the company's perspective and needs, whereas customer-centricity is neglected. Therefore, the objective of this thesis is to find answers to the question: "customer-centricity — how can it be used in building a digital business-to-business client relationship tool", and to direct a customer-centric perspective to the account management. The developmental goal is to develop a client portal concept for Fazer Food Services based on their clients' needs.

Customer-dominant logic, Service logic and Service-dominant logic are theoretical approaches reflected in this study. Account management, digitality, development of service business and service design including the Lean principle are discussed in order to understand how the new portal should be developed to fit into the new demands of digital transformation. Theoretical questions, such as what is customer-centricity, are reviewed. Also, elements for the best practise in digital tool development are given and the suitability of collaborative service design methods and tools in a traditional business context are reflected.

The research approach was a qualitative case study in the field of food service. The empirical part follows the service design process model Double Diamond, and uses several service design methods and tools. Altogether nine client and ten staff interviews were conducted and three internal staff workshops held to gather insight of all the needs, risks and benefits concerning the client portal — its non-functionalities, functionalities, gains, and current challenges. These were mapped during the first process phase into Empathy maps. Three benchmark interviews are conducted including internet search based competition analysis to understand the best practises in the field of digital service design related to portals. The client portal concept is the main empirical outcome: a definition of users in a stakeholder map, personas ("Dynamic" and "Brand loyal"), and a minimum viable product of core functionalities and content of the desired portal system. Other methods used were Jobs-to-be-done canvas, Customer experience and business value matrix, Experience service blueprints as well as mind maps.

This study offers ideas on how to incorporate customer-centricism in digital tool development and client relationship management in practical level as well as in further scientific studies. The theoretical framework for the development of customer-centric digital tools presented in this study can act as a valuable framework. The main conclusion of this study is that the client portal concept could benefit the clients and the company by creating an effective platform for client communication and data exchange, saving resources and even increasing the client retention rate.

Keywords: customer-centric, service design, client relationship management, digitality, client portal

**Laurea-ammattikorkeakoulu** **Tiivistelmä**
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Degree Programme in Service Innovation and Design
Master's Thesis

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**Digitaalisen business-to-business -asiakassuhdetyökalun asiakaslähtöinen konseptisuunnittelu**
**— case Fazer Food Services**

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Digitalisaatio ja kiihtynyt kilpailu ovat johtaneet tilanteeseen, jossa yritykset ovat alkaneet etsiä uudenlaisia ratkaisuja ja toimintamalleja pysyäkseen muutosvauhdissa mukana. Uusia teknologisia ratkaisuja kehitetään palvelujen ja asiakassuhteiden vahvistamiseksi. Saumattoman viestinnän tarve asiakkaan ja toimittajan välillä on entistä tärkeämpää. Uudet ratkaisut toteutetaan kuitenkin usein toimittajan näkökulmasta ja tarpeista, ja asiakaskeskeisyys jää vähemmällä huomiolle. Tämän opinnäytetyön tavoitteena on löytää vastauksia kysymykseen: "Asiakaslähtöisyys – miten sitä voidaan toteuttaa digitaalisen Business-to-Business asiakassuhdetyökalun rakentamisessa", ja tämän kautta ohjata asiakassuhdetyötä yhä asiakaslähtöisempään suuntaan. Kehitystavoitteena on luoda Fazer Food Servicesille asiakkaiden tarpeisiin perustuva asiakasportaalikonsepti.

Tutkimuksen teoreettisia näkökulmia ovat Customer-dominant logic, Service logic ja Service-dominant logic. Lisäksi syvennytään asiakassuhteiden hallintaan, digitaalisuuteen, palveluliiketoiminnan kehittämiseen ja palvelusuunnitteluun sekä Lean-periaatteeseen. Ne lisäävät ymmärrystä siitä, millainen portaalista tulisi luoda, jotta se vastaisi digitaalisen murroksen tuomia vaatimuksia. Teoreettisia kysymyksiä, kuten mitä on asiakaslähtöisyys, mitkä ovat digitaalisen työkalun kehittämisen parhaita käytäntöjä ja kuinka erilaiset palvelumuotoilun yhteisen tekemisen menetelmät soveltuvat perinteiseen teollisuuteen, pohditaan myös.

Tämän kvalitatiivisen ruokapalvelualan tapaustutkimuksen empirian vaiheet noudattavat palvelumuotoilun Double Diamond -prosessimallia. Empiriassa hyödynnetään useita palvelumuotoilun menetelmiä ja työkaluja, joiden tavoitteena on selvittää asiakastarpeita, nykytilanteen haasteita, käsitystä portaalin hyödyistä ja riskeistä sekä toiveita portaalin ominaisuuksista. Yritysasiakashaastatteluja oli yhdeksän, Fazerin työntekijähaastatteluja kymmenen sekä kolme Fazerin sisäistä työpajaa. Tulokset ryhmiteltiin ensimmäisessä prosessivaiheessa Empathy-karttoihin. Lisäksi laajempaa näkemystä portaaleihin liittyvien digitaalisten palvelujen suunnittelun parhaista käytännöistä saatiin haastattelemalla kolmea eri alan yritystä sekä kilpailija-analyysillä. Tutkimuksen tärkein empiirinen lopputulos on asiakasportaalikonsepti. Se sisältää määritelmän käyttäjistä sidosryhmäkarttaan hahmoteltuna, kaksi persoonaa ("Dynaamiset" ja "Brändiuskolliset") sekä kriteerit portaalin vähimmäisvaatimuksista sisältöineen ja toiminnallisuuksineen (Minimum Viable Product). Muita menetelmiä ovat Jobs-to-be-done -malli, Asiakaskokemus ja liiketoiminta-arvomatriisi, Experience service blueprint -suunnitelmat sekä miellekartat.

Tutkimus tarjoaa ideoita digitaalisten työkalujen kehittämiseen ja asiakkuuksien hallintaan käytännön tasolla sekä tieteelliseen tutkimukseen. Teoreettista antia jatkotutkimuksiin on muun muassa viitekehys asiakaskeskeisen digitaalisen työkalun kehittämistä varten. Tutkimuksen johtopäätös on, että asiakasportaali hyödyttää asiakkaita ja yritystä luomalla tehokkaan foorumin viestinnälle ja tiedonvaihdolle, säästää resursseja ja vahvistaa asiakassuhteiden pysyvyyttä.

Ydinsanat: asiakaskeskeisyys, palvelumuotoilu, asiakassuhdehallinta, digitaalisuus, asiakasportaali

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# 1 Introduction

A long-standing problem has been to obtain more information on how companies can increase their customer retention[1] rate and hold on to the long-term client relationships (Reichheld 1994). Today, growing competition, rapid technological change, and globalization (Gök 2009; Heinonen & Strandvik 2017) have put companies to a situation they have never been in. This rapid technological change has transformed into a turning point - an “era of information explosion” (Bagheri & Shaltooki 2015, 340), “the Enlightened Age of Data” (Arthur 2013, 10-11) or the “Age of Value Creation” (Cooper, Vlaskovits & Ries 2016, 24). This so-called era of Big Data, digitalisation and technological transformation forces companies to realize, that in order to keep their competitive edge, their processes and data handling must become much faster (Marvin 2016). This has led to the increased popularity of development principles such as *Design Thinking* (*Service design*), *Design Agile* and *Lean* (Holtzblatt, Koskinen, Kumar, Rondeau & Zimmerman 2014, Ries 2011; Cooper et al. 2016). Companies must create value for the clients to stay alive because in today’s business the power has shifted from the supplier to the customer (Cooper et al. 2016, 24, 28, 41-50) and theoretical approaches such as *Customer-dominant logic* (Heinonen & Strandvik 2017; Heinonen & Strandvik 2015; Heinonen, Strandvik, Mickelsson, Edvardsson & Sundström 2010) have arisen to help understand its deep meaning. Heinonen, Strandvik and Voima (2013) describe how today's business challenge is to know who the customers are, and what are their current mindsets.

Due to the wave of digitalisation and increasing competition, companies are desperately searching for new solutions in order to keep up with change (Baran & Galka 2017, 161; Cooper et al. 2016, 34; Vlosky, Fontenot & Blalock 2000). Companies, especially global enterprises, have developed technological solutions to strengthen their services and customer relationships already years ago. They have created extranets and client portals, to share data with a direct access to relevant documents (Berkovi 2014, 108, 274, 286; Vlosky et al. 2000). A well-designed extranet creates efficiencies and monetary benefits, eases the lives of its users and adds value (Greengard 1997). Described by Higgins, the portal is like a company’s virtual office to which the client can walk in on a daily basis. Higgins (2011) estimates that despite this potential value, only 20 to 40 % of companies have a client portal, an extranet, and even those who do are using only a fraction of its potential. He claims that a client portal can have an effect far greater than any other action the company takes in the next 10 years, and that it can bring a significant return on investment.

As the pace of change increases, the need for more efficient communication between the client and the supplier becomes more critical. It has been discussed how an extranet can enable

[1] Retaining current clients is called retention (Woodburn & McDonald 2011, 153)

faster communication (Grönstedt 2000, 212) yet scientific literature still omits the client oriented-view in the discussion about portal/extranet solutions. Solutions are done mostly from the company's perspective and needs, whereas customer-centricity is neglected. Answers are needed on how clients perceive the portal needs and what serves them best. Therefore, this study aims to solve how a customer-centric client portal can be created to fulfill the client's evolving needs and wishes, especially in traditional industries such as the food service sector.

Portal systems are common in big global companies which offer other services as well, such as facility management (Grönstedt 2000, 212; Secoya 2017; Agasthi 2016). Until now, they have been rare in industries focusing solely on food service, but a change is happening as some clients have started to ask for client portals from companies such as Fazer Food Services. This created the need to build one because Fazer's business is based on clients' needs.

What kind of an approach could be used to develop a customer-centric portal solution for the food service business? Could it be service design? As Reason, Løvlie and Flu (2016, 6) have put it, service design helps companies to react to the fast-changing customer needs and to the competition and to create innovative solutions, as the customer-oriented or customer-centric nature of services design can contribute to keeping the current customers, create new sales as well as efficiency, and reduce costs. The trends towards value in services, expanding customer expectations and digitality have made service design a growing discipline (Reason et al. 2016, 2-6). According to Schneider and Stickdorn (2010, 54-67) service design is a multidisciplinary field of science, process and methods, providing knowledge for building services with a new type of iterative and modern process. As services are developing, so is service design itself constantly evolving and new ways of designing are evoked. The rising popularity of service design, as well as its interdisciplinary nature, underline the importance of common structures, processes and methods that help to design better services.

Schneider and Stickdorn (2010, 39) emphasize, how design thinking can influence corporate success. Combined with new sophisticated technologies, service design can substantially enhance customer experience and satisfaction with its co-creative and organisational border crossing nature. The opportunities presented by service design, as well as the challenges of business-to-business client retention and digitalisation, are an interesting combination that has formed the initial scope of this thesis, because its writer is particularly interested in those fields; developing digital tools, enhancing customer relationships, and creating new sales especially for Fazer Food Services. The next chapter describes the company of the case study, its current challenges and the background of the portal project and thesis work.

## 1.1 Background of Fazer Food Services and the case study

Fazer is a major Finnish family-owned company operating in eight countries and exporting products to approximately 40 countries. Its six business units focus on food service, bakery, confectionery, grain products, life style foods as well as café services. The company is 125 years old and employs a total of 15,000 people. This study was made for one of Fazer's business units, Fazer Food Services. The company serves food in more than 600 restaurants in Finland to all customer segments: business, industry, day care centres, schools, universities, cafeterias, senior care, public institutions, and events.

Fazer Food Services' market is fairly mature and finding new competitive edges is crucial. Seeing what adds real value to the client is important, because the winner of the market will be the one with the highest retention rate. As winning new clients costs up to five times more than retaining the current ones (Baran & Galka 2017, 77; Woodburn & McDonald 2011, 153) account management is of critical importance. There are new competitors entering the market, even ones with a tot ally new revenue model, such as online food delivery services. The industry giants, like Fazer itself, have realized that small enterprises focused on other types of restaurant sectors are entering the field as well. And what makes this even more challenging is the pace of change. It is breath-taking, even chaotic, if not taken seriously and fitted to the company strategies, such as the account management strategies.

The first idea of a client portal was introduced already in 2015 in Sweden in a one-day workshop discussing the business website concept development. The participants represented different roles from all the Nordic countries. This workshop identified the need to nourish current business-to-business (B2B) client relationships with targeted information and communication. The workshop participants described how "*we realized that the service needs are different for new clients and existing clients that need nurturing. This kind of relationship requires quite a different service than just telling "become a customer" and "with us you will get great restaurant services". So that's where it all really started.*" Another one confirmed: "*[...] you are absolutely right - we talked about an extranet but it was a little bit ahead in the future.*" The idea of developing an extranet was put on a road map for future phases. It was already seen that the client portal could be a way to offer client- and sector-specific information, which goes even deeper than the current company website.

In 2016, a year after this B2B website workshop, Fazer Food Services' real impulse for the idea of this thesis came from a current client, a governmental institution. This client required a portal solution in their framework agreement based on a competitive tendering process. They required real-time automated access to specific information. As Fazer Food Services did not have this kind of portal services, a solution was developed to fit the framework agreement's requirements. The writer of this thesis was a member of this project.

In 2017 a discussion began on how the portal should be developed to match the clients' needs even better. Underlying this is a strong customer-oriented mindset spanning all operations. Understanding the needs of business-to-business clients and restaurant guests is considered extremely relevant. The main idea was to develop a tool for the client's purposes and the second goal was to make it match the company's needs.

The company has some internal challenges to tackle and there was an idea that maybe a portal could help solve them. One challenge the company currently faces is the amount of different systems account managers need to use. Reporting, measuring and communicating to clients are currently done using several programs: business analytics, agreement management, invoicing, customer satisfaction systems, purchasing, document management, etc. Combining various systems into one portal view could minimize the number of systems that account managers need to use on a daily basis, and make it less overwhelming. Another challenge is the amount of email. Currently, client communication is based mostly on face-to-face communication, phone calls and sending emails. Contracts define which reports the clients receive and how often. Documents are sent mainly by email, which makes sharing large files sometimes problematic. The third challenge is the scattering of expertise within the organisation. Why? Gathering knowledge and information in one place efficiently is a challenge, because it is sometimes not known who knows the most about the subject. People do the same work in different locations without knowing about each other's work. The fourth challenge is the very heterogeneous and diversified group of clients.

Considering all these challenges, a well-designed portal could frame it all, combine systems, replace emails, and share expertise. The company wanted to find out what kind of a portal would serve them best in addressing these challenges, and whether there were other needs beyond the governmental institution's needs. They were also interested in understanding the portal's possible benefits and creating it to match the clients' needs.

Before starting any concept projects, it was important to find out what solutions already existed. It was confirmed that one business unit had a portal service, but it was developed for another purpose. Therefore, its structure and other elements could not be used in this new portal.

After the need to develop a client portal concept was established, the next question was: who would create it? Having an interest in digital development, being the chief editor of the company's website, and working in the sales department with tenders, service models and concepts, made it natural for the writer of this thesis to participate in the project and to suggest developing this portal concept as a thesis subject. The next chapter describes the objective of the study and the research questions in more detail.

## 1.2 The objective, purpose and approach of the thesis

The company is steering its business towards an even more customer-oriented operating strategy. This led to the establishment of a concept project consisting of a project manager, a project owner, and the thesis writer. The thesis writer was appointed to create a business-to-business client portal concept by using service design methods and tools. The developmental goal set by the concept project is to create a digital platform to enable data exchange between B2B customers and the company. This thesis report is the concept project report including the description (Chapter 5) of the final concept: the clients' needs, and the definition of features and functionalities based on those needs.

This study aims to give valuable information to the account management by showing how companies can develop client relationships by seeing the world through client's eyes. This thesis work is based on the research questions, defined by the thesis writer as a part of the thesis work, as well as on the concept project goals established in the company in August 2017. The goal is to use service design to find answers to the following research question: **"customer-centricity — how can it be used in building a digital business-to-business client relationship tool".**

In the context of business-to-business research, the sub-questions are the following:
1. How is customer-centricity defined?  / RQ1
2. What are the best practises when building a customer-centric digital tool? /RQ2
3. How do collaborative service design methods and tools fit into a traditional business context? / RQ3
4. In which ways can a portal tool be prototyped? / RQ4

In the case of Fazer Food Services the objective of the concept development is to find answers to the following questions:
1. What should be taken into consideration when building the portal (What challenges there might be? Who are its stakeholders and users? / DQ1
2. What should the portal be like (ideas and feelings)? /DQ2
3. What kind of needs do the clients and the company have (features and content)? /DQ3
4. What are the benefits of the portal? / DQ4

Question DQ1 gives an answer to what should be taken into consideration when building the portal, the challenges, risks, stakeholders, users. This question is situated in the outer circle in Figure 1 as in this study it is assumed that challenges impact needs for the portal as well as what kind of users and stakeholders it has. The first development question is related to issues such as what kind of aspects need to be taken care of when trying to create a customer-centric digital tool, and what challenges people face that evoke needs. DQ2 is related to finding out what matters to the clients and staff: what is important to them and what is not. It is about what kind of non-functional features are desired. This is a question of abstract thoughts and feelings, not concrete needs related to content or functionalities. Question DQ3 gives an answer to the practicalities, and is more about what the portal will really be like. DQ4 are the benefits desired of a well-planned client portal. The research questions RQ1-RQ4 are answered in order to be able to create the portal, and to achieve the objectives of the development phase, and to answer questions DQ1-DQ4.

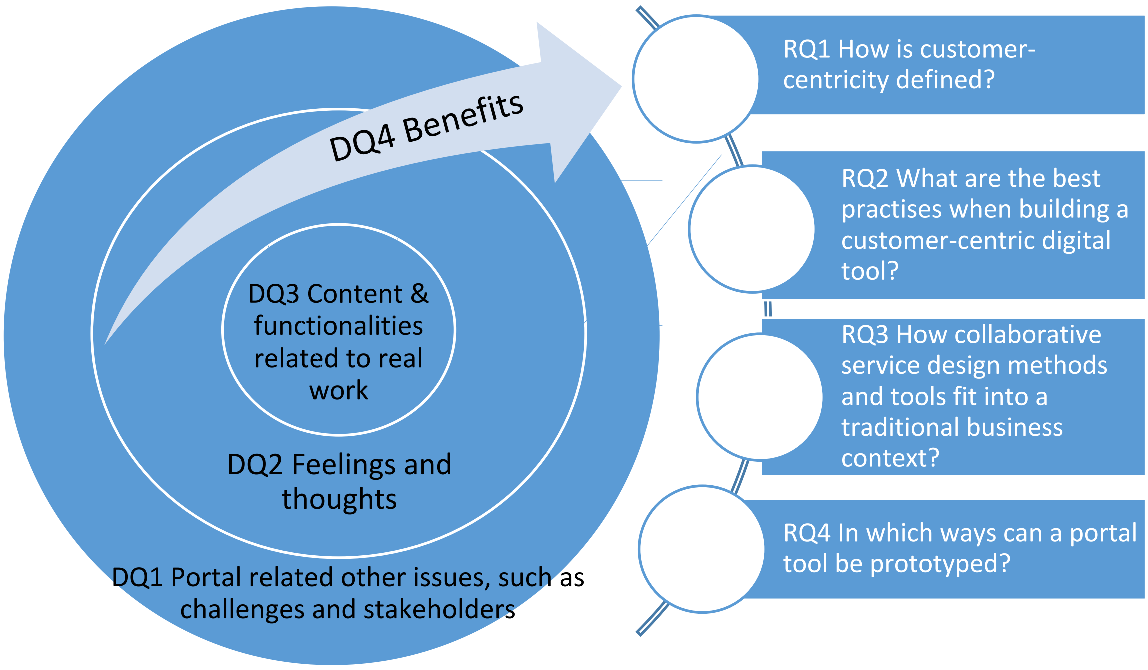


Figure 1: The relationship of development and research questions

In the third research question (RQ3), "traditional business" is defined as a business in, for example, food and other industries that have existed for decades, or even longer. The solutions of competitors and other companies are investigated (Chapter 4.2.1). Also, stakeholders are identified, to be able to understand the main users of the portal. The project was planned to run until the end of 2017.

The objective of the theoretical part of this study is to create an understanding of all the perspectives transforming today’s business. Therefore, the theoretical part (Chapter 2) focuses on account management and its changes (Chapter 2.1), digitality in today’s business (Chapter 2.2), services business approaches (Chapter 2.3) and new development principles (Chapter 2.4), such as the Lean principle, along with service design and its theories. The aim is to link all these theories together by creating a theoretical framework (Chapter 2.5). The main theory behind this study is the Customer-dominant logic (Chapter 2.4 page 34, Heinonen et al. 2010) as it places the customer in the centre and connects theory to the empirical methods. It also offers a new approach to company-client relationships, as earlier literature has been mainly based on the service provider's perspective (Heinonen et al. 2010). Digitality and account management need to be studied because the client portal would be a new digital service in client relationship management. Service design and the Lean principle are studied because service design is the basis of all development in this study, and it uses a lot of ideas from Lean development, such as the minimum viable product (Chapter 2.4, page 38).

As this study is done in a particular company environment within a limited period of time, this research can be defined as a case study. Case studies are suitable for studies related to contemporary sets of events, such as this study case, and topics the researcher cannot control (Yin 2014, 3-4, 14). According to Yin, case studies try to answer questions such as "how" and "why" a phenomenon works. Yin adds (2014, 3-4) that in-depth interview is the most suitable method to find answers to those questions and to get real insight into the client's life. As mentioned above, the objectives of the study were to gain an insight of the clients' needs, challenges and possible benefits of the portal—to really understand their perspective. To understand what the customer is doing or aims to do and how a service (portal concept) fits this scope, is also a relevant part of the main theory of this study, the Customer-dominant logic (Heinonen et al. 2010). Therefore, it was important that the methods used in this study would help understand the clients' underlying reasons and motivations. Qualitative research methods, e.g. in-depth interviews, seemed to fulfil this purpose, as the qualitative approach seeks insights and explanations to gain a comprehensive understanding of the phenomenon (Eriksson & Kovalainen 2016, 4-5). When it comes to quantitative studies, they do not enable the spontaneous in-depth questions to understand what the person really means (Silverman 2011, 12-16).

This study follows the services design process model, the *Double Diamond*, combined with service design methods and tools. After comparing different service design processes, the Double Diamond was chosen as it provided the best visual description of the phases of this study and it was also familiar inside the company, which made it easier to communicate. The tools and methods used in this study were also chosen to fit the Customer-dominant logic (*CDL*). Heinonen et al. (2013) underline how new research methods should be used to understand the customer's life. Therefore, the goal was to find a tool to support this Customer-dominant logic approach. The empathy map acts as a framework during the Double Diamond's research part, the discover phase. Other tools used are mind maps, stakeholder maps, jobs-to-be-done canvases, customer experience business value matrices and expressive service blueprints. These methods are described in Chapter 3.2.

This thesis includes a number of business-to-business interviews in the business, industry, university, health care and public office sectors. Interviews within the organisation, with staff representing different roles and departments, as well as benchmark interviews, were also conducted. Also, three facilitated internal workshops with the company personnel were held. The facilitation methods “World Café” and “MeWeUs” were used, as they are co-creative and easy for the workshop participants to understand. These methods are described in Chapter 3.2. Insight was gathered from the staff’s and business-to-business clients’ current challenges, needs and feelings, to understand what kind of a portal concept could facilitate and create efficiency in the mutual client relationship.

The concept itself is created in Finland with Finnish clients, but the needs of the other Nordic units are taken into account for the portal to be scalable to their needs as well. Schools, day care centers as well as senior care and other similar institutions are not included in this study due to the nature of the segment. The public sector is a very heterogeneous segment and it is suggested to be analysed separately later on. Companies with real estate rental agreements are also not included because of their assumed lower need for a client portal, as they receive fewer reports and other documents from the provider.

A client portal system will be created later based on the findings and the concept created in this study. The goal of the system itself will be to highly enhance customer satisfaction during different phases of the customer lifecycle, trigger new sales, and help retain existing clients. Whether the portal increases efficiency, customer satisfaction and retention, remains to be seen. It can be measured after implementing the system. The increase in efficiency can be calculated, for example, by comparing the time used for current manual reporting versus time used for reporting via the portal.

### 1.3 Structure of the report

This chapter describes the structure of the report, which is visualized in Figure 2. Chapter 1.4 describes the concepts of the thesis and Chapter 2 dives into the theories. The theoretical part contains literature related to client relationship and account management (Chapter 2.1), digitality (Chapter 2.2), approaches in service business (Chapter 2.3), the Lean principle and service design (Chapter 2.4). These are relevant issues for the portal development, as they all support its development from a customer-centric perspective and bring insights into today’s transforming business world.

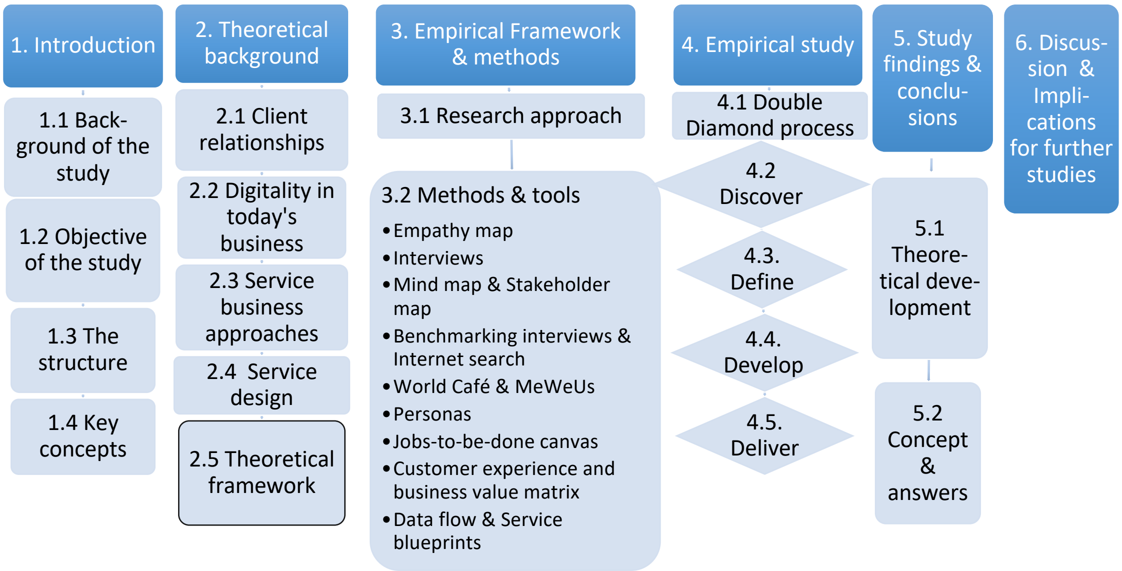


Figure 2: Structure of the report

The empirical framework and methods are presented in Chapter 3. The methods used include the Empathy map with its pains and gains tool, mind map, stakeholder map, jobs-to-be-done canvas, service blueprint, personas, and customer experience and business value matrix. Chapter 4 contains the empirical part of the study following the service design process Double Diamond phases: discover, define, develop, and deliver. The empirical part emphasises the discover phase with its several interviews and workshop. Results of the discover phase are presented in Chapter 4.2.5, whereas study findings of the whole empirical part are discussed in Chapter 5. Discussion and possible implementation of results and suggestions for further studies are described in Chapter 6. The next chapter is the last chapter of the introduction presenting the key concepts of this thesis.

## 1.4 Central concepts of the thesis

This chapter presents the concepts of the thesis. Other key concepts such as service design, customer-centricity and the minimum viable product are defined in the theoretical part (Chapter 2).

**Client, customer, account and guest**

In this study, business-to-business customers are called clients, customers or accounts. This is based on the definition by Heinonen and Strandvik (2015, 472-473), in which users, buyers and clients can all be called customers; and as the definition of customers is not self-evident, we define customers as clients in this study. The end-customers in the business-to-customer context are called guests.

**Service**

Meroni and Sangiorgi (2011, 18-24) and Vargo and Lusch (2004a) define services as intangible, inseparable, heterogenic and perishable. Service is an experience and cannot be physically touched the same way as goods. Inseparability describes how most services emerge in the presence of the customer. Heterogeneity relates to the fact that services vary according to time, situation and people taking part in it. Perishability describes how services cannot be stored, which puts pressure on companies to make well planned supply-demand decisions. Heinonen and Strandvik (2015) define service as a part of an overall offering.

**Co-creation and co-design**

Co-creation and co-design are connected and describe participation between the client and the company. Sanders (2008) explains that in co-creation all the people participating in the design process work collaboratively together, also the users, even though they are not professional designers. Vargo and Lusch (2008) see that companies can provide value and that co-creation comprises the whole service process in which the customer is always a co-creator. In this study, we use co-creation to describe collaboration during the whole service design process according to Sanders' and Vargo and Lusch's view. Co-creation is defined as collaborative actions inside the organisation, as well as with clients and other stakeholders.

**Customer insight**

Customer insight tells us the underlying reason why the customers act the way they do (Polaine, Løvlie & Reason 2013, 39). In this study, we define that customer insight is understanding what the customer thinks and feels. It means gathering a comprehensive knowledge about the customers behind the purchase decisions—seeing the products and services through their eyes and thoughts. It is not only about understanding the added value of the product or service to the customer. Moreover, it is knowing the core value, which the customer expects to receive and prioritises in his or her decisions. It is the key to better business performance and product innovation.

**Extranet = Portal**

Extranet, or in other words portal, is a network integrated with the company's databases built to enhance business-to-business relationships (Ince 2013). It is described as being a close network (Baran & Galka 2017, 143), which links business partners to one another over the internet. It can be built, for example, on an existing intranet, offering access with specified user rights. (Baran & Galka 2017, 143; Greengard, S. 1997; Vlosky et al. 2000.) Extranet and portal are used as synonyms in this study.

**Management fee, own risk agreements and rental fee agreement**
The company of this study has mainly three types of contracts with clients: management fee agreements, own risk agreements and rental fee agreements. The principle of the management fee agreement is that the service provider manages the restaurant operations according to the principles determined by the client. The costs of the restaurant operations are paid by the client, who on the other hand receives the sales proceeds accrued from the restaurant operations. The restaurant service provider receives a service fee, and the operational costs are covered by the client. Under the management fee agreement, the client holds the risks of the restaurant operations, whereas under the own risk agreements, the provider holds the business risks. Rental fee agreements are also used. Under those agreements, the supplier pays an agreed rental fee based on the space used by the supplier.

**Retention**
Retaining current clients is called retention, and it is calculated as a percentage of retained business from one defined period to another (Woodburn & McDonald 2011, 153). The importance of retention was brought up by Reichheld (1994). He suggested companies to concentrate more on client retention than on new customer acquisition.

The introduction chapter started by describing the phenomena of the increasing pace of change, competition, and digitalisation. This was followed by presenting the background of the study and its need to match the clients' needs. The purpose and objective of the study was framed, and a structure of the thesis presented. Next, the concepts defined above are connected to the following chapter which describes the different theories and models related to the case study.

# 2 Perspectives in transforming business-to-business

In order to understand the context of the study and the portal development, a wide range of theories and models from the fields of client relationship management and service science as well as the digital transformation were studied for this thesis. This theoretical part supports the study in finding an answer to the research question: "customer-centricity – how can it be used in building a digital business-to-business client relationship tool".

The reasoning approach of this study was abductive, meaning, that only after starting the interviews and workshops it became apparent, which literature, theories, trends and phenomena are connected to the study. The abductive approach will be discussed in Chapter 3.1. As the portal is a business-to-business client relationship tool, understanding the theoretical background of account management is relevant. The focus is on theories describing the client relationship and its development (Chapter 2.1). Furthermore, this is connected to the next theoretical part, digitalisation in today's business (Chapter 2.2). The topic of digitalisation cannot be missed, as it is probably the biggest influencer to why other than ICT-focused companies are also creating portals to better meet their clients' needs and wishes. Another major topic area is service science and its approaches (Chapter 2.3), such as Customer-dominant logic, which inholds the importance of customer-centrism in today's business. The fast-changing customer needs and increasing pace of competition in the market have put companies also in a situation where they have to consider whether to start using new development principles (Chapter 2.4). Therefore, the Lean principle is also discussed as its elements are part of service design, such as the minimum viable product concept. The last theoretical topic in Chapter 2.4 is service design, the models and theories of which form the basis of this study. A comparison of different service design process models is also presented, and based on that comparison, the Double Diamond is chosen as the model for this thesis. Chapter 2.5 presents a framework of the different theories.

## 2.1 Client relationships management—the core of business

Already in 1997, McDonald, Millman and Rogers stated, that account management was more complex than it had been before. Now, 20 years after the statement made by McDonald et al. (1997), it is likely to be more complex as changes are even more rapid. The client portal concept in this study is being developed partly to help clients and account managers facing this complexity, but to understand their world, a dive into the theoretical background of account management needs to be done. In this chapter, the evolution of the theoretical background of client relationship and key account management is presented, and the importance of retention is discussed.

**Evolution of client relationship**

Client relationship management is a core strategic function focused on enhancing value by developing relationships between the company and its clients (Payne & Frow 2005). Account management is a general definition of client relationship management. Account management in the 1970s and 1980s was considered mainly as a sales functionality (see Figure 3). Supplier's needs and costs were in the focus, and models such as Transaction Cost Economy (TCE) prevailed. In the mid-1990s, account management shifted towards relationship marketing (Gosseling & Bauwen 2006). Account management had an emphasis on market share and size (Johnson & Selnes 2014) and instead of focusing on the client's needs, the theoretical discussion was more focused on the seller as a passive supplier actor (Gosselin & Bauwen 2006). Account management theory was mainly discussed by McDonald et.al (1997) and scientific studies were scarce before the year 2000, after which a more holistic approach took over.

As the theoretical background of account management might seem blurry, Figure 3 below was made for the reader of this thesis to understand the connections of the issues discussed above. It describes the evolution of client relationship management from transactional perspective to client-focused management.

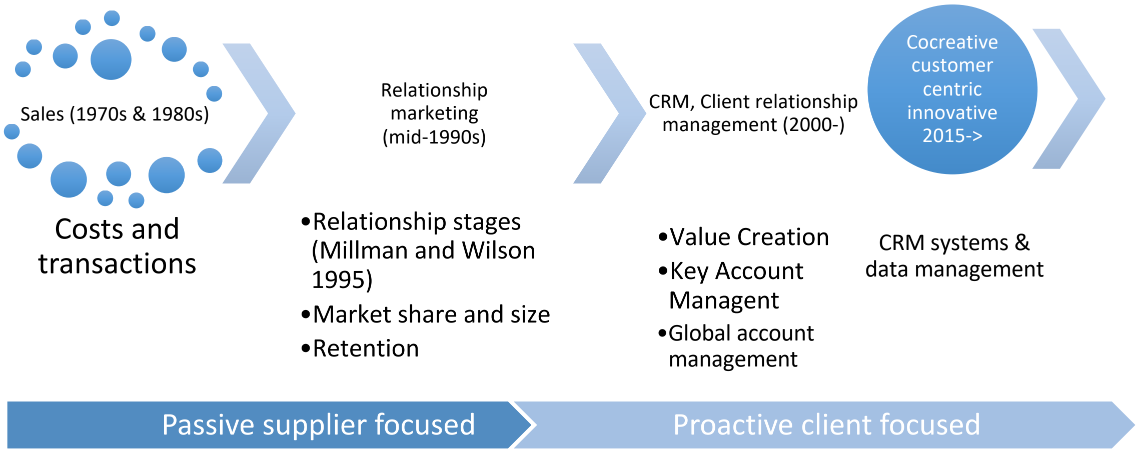


Figure 3: The evolution of Client Relationship Management

**Key account management**

Gosseling and Bauwen (2006) see the importance of the account manager's role as proactively enhancing client relationships. This is supported by Johnson and Selnes (2004) who state that the key to profitability is in developing client relationships, and Wang and Brennan (2014) add that long-term financial success can be gained by co-creating value with key clients, instead of maximizing revenue.

To take care of the most important customers and to prevent them from leaking off the bucket, so to say, clients need to be identified, classified, and a client strategy needs to be developed (Cheverton 2008, 5; Woodburn & McDonald 2011, 26-85). Ojasalo (2001b) adds that key accounts need to be analysed after identification, and operational level competence needs to be planned to fit the strategy. The most important clients are taken care by Key Account Managers (KAM). Key Account Management has been a common function in the service industries for three decades, and it aims to optimize long-term relationship returns through investments (Wang & Brennan 2014). According to McDonald et al. (1997) the key account portfolio comprising of several clients is handled by a key account manager, who takes care of clients' needs on a regular basis by offering them tailored solutions. They focus on the strategically most important business-to-business clients and long-term client relationships (McDonald et al. 1997).

**Classifying clients and defining relationship phases**

Important clients can be identified, for example, by using Woodburn and McDonald's Key Account Selection Matrix (2011, 26, 40-47), and they can be further developed in the Customer Portfolio Management (Terho 2009; Thakur & Workman 2016). By using Wang and Brennan's

(2014) classification model, clients can be also categorized by the revenue they bring versus the value of the relationship. Wang and Brennan (2014) combined KAM with revenue management and identified four categories of clients according to how much revenue value they bring versus the value of the relationship, e.g. the “True Key Account” offers high revenue value and high relationship value. Most of these identification models are very company-driven and lack the client’s perspective and the client’s perceived value.

Instead of presenting different matrices of how to define key clients, the discussion on how relationship stages can be classified and how they develop is seen more relevant in this study, as client’s needs are of interest and retention is one challenge the food service sector currently faces. Various classifications have been developed (Cheverton 2008; Millman & Wilson 1995; Wilson, Zeithaml, Bitner & Gremler 2012, 141-143; Woodburn & McDonald 2011, 53-55). These classifications describe how relationships develop from short acquaintances into long-lasting partnerships. Understanding how much the client knows about the service, the level of expertise, is also relevant in creating long-term client relations (Ojasalo 2001a). Ojasalo suggests discussing the long-term benefits of the service with new clients and groups the clients into novices and experts. Clients can be also categorized into acquaintances, friends, and partners (Johnson and Selnes 2004; Wilson et al. 2012, 141-143). Another example is a six-stage key account relation development model developed by Millman and Wilson (1995; 2003; McDonald et al. 1997). Millman and Wilson’s model describes the steps from transactional low involved relationships to collaborative synergistic key account relationships. In Millman and Wilson’s model the relationships between the company and the client are classified into the following steps: pre-KAM, Early KAM, Mid-KAM, Partnership KAM and Synergistic KAM. This model can help companies define their competitive edge for different types of clients in different stages of relationships (Millman & Wilson 1995).

The client relationship development models described by Cheverton (2008) and Woodburn and McDonald (2011, 53-61) are based on Millman and Wilson’s model. According to Woodburn and McDonald (2011, 54) the simple, **transactional** relationship is connected by an account manager (see Figure 4). This is the Early KAM Phase (Cheverton 2008, 52). As long as the client is satisfied, the relationship is stable. In this type of relationship, there is a risk of losing the relationship and vulnerability to competitor’s actions increase, as there is only one person connecting the company and the client. This type of relationship does not fully benefit the relationship as the touchpoint is so narrow. This one-point connection is also very dependent on how well the “moments of truth” (Grönroos 2007, 453) are taken care of between the client and the company. In order to develop the relationship further, there needs to be more cooperation between the parties and the ultimate goal for the selling company, the provider, is to create **interdependent** relationship with the buying company (Woodburn & McDonald 2011, 54-59). This relationship is no longer dependent on one touchpoint, the account manager and the client manager, but is linked through several touchpoints and people.

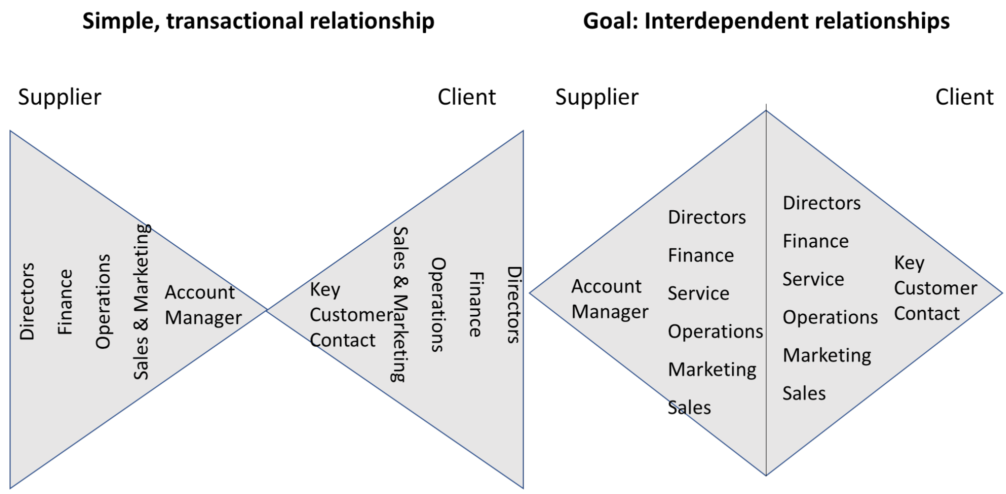


Figure 4: Stages of relationships (Woodburn & McDonald 2011, 54)

McDonald et al. (1997) point out the importance of transforming the client relationship into a partnership. This is defined as the partnership KAM stage in Millman and Wilson's model (Cheverton 2008, 54). When this happens, the surface combines these two organisations over multiple layers of people, not only from operations, but also directors and people from finance, services, sales and so on (Woodburn & McDonald 2011, 54-59). Grönroos (2007, 454) also presents in his customer-focused strategy how interactive marketing between the customers and the company is connected to various people inside the organisation. He defines them as part-time marketers. The partnership can even reach the synergistic KAM stage, which might mean joint business between these two companies (Cheverton 2008, 55).

**Retention**

To create a partnership, clients should be well taken care of. Therefore, retention should be highly valued in every business, rather than only focusing on closing the sales cases. One commonly used theory is the bucket theory (Wilson et al. 2012, 142). New customers and added sales fill the bucket but if the bucket leaks, the current client relationships are lost and the retention rate decreases. This is a very simple way to describe why relationship development is important to a company. Every leak is lost money. Ojasalo (2001b) points out how changing the provider causes switching costs for both sides. Reichheld, Markey and Hopton (2000) point out that a satisfied client might not be a loyal one. It is the proven track of repurchases that measures real loyalty. Woodburn and McDonald (2011, 153) add that it is the quality of the market share that matters and the loyal clients in that market. To summarize, strong quality market share with loyal repurchasing customers make the business. The cost of acquiring new clients is on average five times higher than keeping the current ones satisfied. Studies show that a five-percent increase can impact future turnover with an increase of 25 to 85 percents (Baran & Galka 2017, 277; Reichheld 1994, see Figure 5). Woodburn and McDonald (2011, 154) list five reasons explaining the cost of new client acquisitions:

1. It takes more time to find new clients and to make them profitable than keeping the old ones happy.
2. Satisfied current clients use more money in single purchases.
3. Satisfied client relationships are more efficient and more willing to integrate even their IT processes.
4. Satisfied clients can be used as reference when creating new sales.
5. Satisfied clients are less price-sensitive.

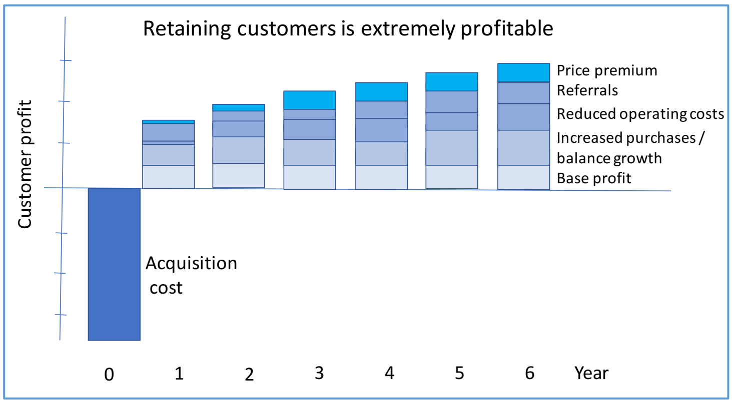


Figure 5: Client profit related to retention and client lifecycle (Reichheld 1994)

Retaining current clients and keeping them satisfied and loyal can make client relationships “interdependent”, and even “integrated” ones, when they start spreading a good word about the company (Woodburn & McDonald 2011, 155). The interdependent ones are satisfied clients and the integrated ones feel they are almost a part of the company. Woodburn and McDonald claim that the closer the client relationship is to an integrated partnership, the more rewarding it feels to both sides. They also point out that these relationships need a lot of dedicated resources. Therefore, with most of the client relationships, the interdependent stage is good enough and already a huge step forward from the simple transactional one with one touchpoint. (Woodburn & McDonald 2011, 155)

Keeping promises is a key element in client relationship. The company makes promises through its marketing actions and sales. The internal marketing is seen as enabling the promises, whereas the interactive marketing and communication in client relationships is seen as keeping the promises and fulfilling them. (Grönroos 2007, 454-457.) Promises are also written on contracts and service level agreements.

A retention strategy and interdependent stage relationship is connected to a vast amount of data. Baran and Galka (2017, 280) point out the importance of database technology and CRM systems in client interaction, especially in the dialogue between the supplier and the client. Could data management help in reaching the Interdependent stage? Could the portal connect the supplier's and client's core people together and keep the sides attached as in the right side of the Figure 4? According to Woodburn and McDonald (2011, 76) new web services offer possibilities for interaction and communication between the client and the provider—they get pulled towards each other's internal environments.

**Communication in client relationships**

Finne and Grönroos (2017) point out that face-to-face word-of-mouth communication is the most relevant source of messages. Yet they underline the importance of understanding that it is not enough, because the transformation into a world of multi-channelled social media needs new ways of working. Their customer-centric marketing communication approach presents a new concept, communication-in-use (Finne & Grönroos 2017, 454): "a customer's integration and sense-making of all messages from any source, company driven or stemming from other sources the customer perceives as communication, forming value-in-use for him or her for a specific purpose." The idea of this concept is to emphasize how today's multiple channels in the customer's own life create several message streams, out of which the customer chooses the most valuable ones related to the specific issue, the value of communication (Finne & Grönroos 2017, 455). They also (Finne & Grönroos 2009) developed a Relationship communication model, CIMC, to replace the idea of seeing the client as a passive receiver of company communication message. In their model, they bring up the issue of emphasizing outside-in communication instead of focusing on inside-out communication. Their customer-centric marketing communication approach has its roots in the Customer-dominant logic (CDL will be discussed in Chapter 2.3).

This chapter presented an overview of the different approaches in account management. As the research goal is to create a concept that serves both sides, the client and the company, understanding the client relationship and its development is mandatory and leads to a better concept. Among other literature, stages in client relationship were presented and the role of retention was clarified. As data management plays a major role in today's account management (Baran & Galka 2017, 132; Rogers 2016, 6) understanding the influence, impact and opportunities of digitalisation is necessary. These will be discussed in the next Chapter 2.2.

## 2.2 Digitality in today's business

Digital transformation impacts business (Rogers 2016) and client relationships, and therefore it is a relevant issue connected to the client portal development. In this chapter, current challenges and the value of digitalisation for business are presented, as well as the transformation in sales approach and personnel mindset. Possibilities in creating an extranet and its main elements are also discussed.

Digitality and Big Data are here to stay, also in the field of account management (Baran & Galka 2017, 161). The role data is changing and becoming more and more important (Rogers 2016, 4). According to Dragland (2013), in 2013, already about 90% of world's data had been created in the past two years, and according to Harris (2016) data created in the year 2017 is more than the amount of data created in the past 5,000 years of humanity.

Why has digitality become a necessity in the business environment as Baltes (2016) states? Previously change in business was driven mainly by client demand, competition, and expectations of quality. Other change drivers were the need for organizational growth, production cost reductions, individual leadership agendas, the economy and new technologies (Bonvillian 1997). The answer to the question above is that digitalisation influences these factors, and according to Marvin (2016) those companies that are able to face and tackle the challenges linked with handling and integrating large amounts of data, so called Big Data[2], will gain increased competitive advantages.

**Big Data**

What is Big Data and how is it related to digitalisation? Briefly, combining different definitions from Marvin's article (2016), Big Data refers to an information asset, a large amount of data, in different formats processed fast through different types of sources in real-time revealing possibilities for new insight and decisions. The possibilities of using all the collected data are enormous. Big Data in various cloud based systems is making our world increasingly digital (Bagheri & Shaltooki 2015, 340). De Mauro, Greco and Grimaldi (2015) add that Big Data requires specific technology and analytical methods to be transformed into value. Data is cheaper than ever before to store and use, but as the magnitude of data is becoming enormous (Rogers 2016, 4, 97-99), the harder it is to transform it to valuable information.

What kind of role do digitality and Big Data play in business? Digitality is driving a strong change in companies, and companies are becoming more and more aware of the possibilities

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[2] Big Data is defined by Gartner (2017) as "high volume, high velocity, and high variety information assets that require new forms of processing to enable enhanced decision making, insight discovery and process optimization".

it offers to decision making and to their own company's deficiencies in the current systems (Bagheri & Shaltooki 2015). According to Goldenberg (2013), Big Data in companies is a complex data combination deriving from client management systems (CRM), ERP's and several other systems. Bagheri and Shaltooki (2015) emphasize that Big Data should be built by integrations to complement the existing infrastructure, not to replace it. Another important aspect is that collecting data does not bring value—analysing it and using it as a basis for data-driven decision-making does (Goldenberg 2013). Bagheri and Shaltooki (2015) emphasize the need for robust statistical methods. Goldenberg (2013) states that as the amount of data is so enormous, the focus should be on getting enough insight from it. Insight derived from data can be used to engage clients more effectively, which brings real monetary value by higher retention rates (Arthur 2013, 151).

**Transforming mindset in business**

How can companies adapt into digitality and lead this change? Companies must transform (see Figure 6) their mindset from traditional sales funnel thinking into digital sales funnel thinking (Leboff 2016, 14, 92; Rogers 2016, 6, 11), and Cooper et al. (2016, 105-120) suggest flipping the order from "aware to transaction" to "passionate to aware". The traditional sales funnel is based on trying to reach as many prospects as possible, to create awareness. But this is no longer the case as the power is shifting from the companies to the customers who are already aware and have more and more information available through the various digital channels (Cooper et.al 2016, 24, 28, 41-50; Leboff 2016, 14, 92). Everything is increasingly tailored and personalized. Clients can go all the way through the sales funnel without any interaction with the sales managers. Therefore, there is a transformation from the traditional funnel to the digital sales funnel. Compared to large campaigns, the new way is to target carefully, less massively, and engage. The more clients you attract, the bigger the number of engaged prospects. The idea is to keep them in the funnel until the moment for sales is mature. This can be done by using social proof, such as references and word of mouth, writing blogs and sharing consultative knowledge. These act as testimonies and create value around the company's actions. With brands, this can also lead to a shared mindset with the customers. Once these customers are engaged, they are more likely to buy from the company than from others. (Leboff 2016, 7-23, 83-103.)

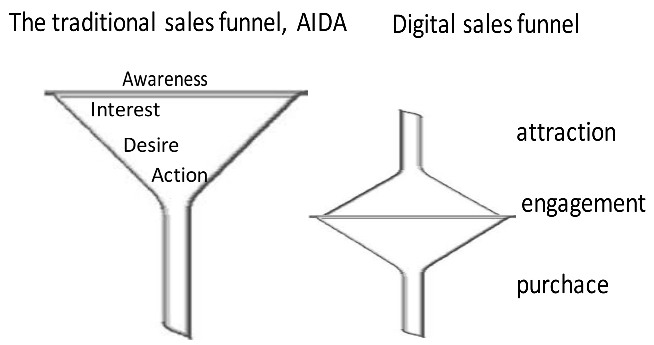



Figure 6: The traditional sales funnel versus the digital sales funnel (Leboff 2016, 14, 92)

One of the research goals of this study was to understand the possible benefits of the portal. What happens after the funnel? Could the purchase phase in Figure 6 be followed by another engagement phase and the system behind it would be the portal? It will be seen, after the system has been used for a while, whether the portal can nourish the clients and keep them. A great benefit would be if the portal could support retention and attract new prospects. These questions will be addressed in Chapter 6.

Changing the mindset to digital funnels and channels is not enough if the people and the company culture are not ready for the transformation. According to Arthur (2013), changing the company culture into a data and analytics focused organisation needs people to lead the change. The main rules of managing change are communicating the change regularly with all the necessary parties, linking it to the company strategy, and engaging people (Cervone 2011). The factors affecting change resistance are change-specific cynicism and scepticism (Stanley 2005). Change might provoke employee cynicism, which Stanley (2005) defines as disbelieving the management’s motives. Stanley (2005) also defines change-specific scepticism as doubting the viability of achieving the stated objectives. Furst and Cable (2008) suggest tackling suspicion, cynicism and scepticism by keeping up regular manager-employee interaction. According to them, positive attitude to change correlates with how positively the managers can influence their employees, with the nature of the relationship between these two.

**Building a client portal**

According to Payne and Frow (2005, 168), well-developed processes in client relationship management offer “opportunities to use data and information to both understand clients and co-create value with them”. They point out the cross functional nature of CRM, how the processes, people, operations, as well as marketing need to be integrated through information, technology, and applications.

Account management literature (Baran & Galka 2017; Woodburn and McDonald 2011) discusses the technological solutions for account management focusing on CRM systems highlighting the importance of client relationship management systems. Grönroos (2007, 463-464) discusses the important role of technology in today's business. Nonetheless, the idea of a portal is barely brought up. For example, Baran and Galka refer to an extranet only a few times (2017, 77, 143). It seems that the current account management scientific literature is missing the broader debate on portal solutions' role in client relationship management, whereas websites offer loads of articles, blogs, supplier offerings on developing portals and extranet. Most of the literature date back to the millennium. Some books, such as Grönstedt (2000, 212), include a short description of portal experiences by the company but omit the client perspective. A glimpse of the client perspective is in Greengard's article (1997), where he states that a portal creates efficiencies and monetary benefits, eases the lives of its users and adds value. Vlosky et al. (2000) discuss the impact of extranet on business practices and relationships. Short one-page articles in Certified Public Accountants' publications were found on client portal and their benefits (Higgs 2015; Girsch-Bock 2015). According to Berkovi (2014, 108, 274, 28), Vlosky et al. (2000), Kepczyk (2008) and Girsch-Bock (2015), major benefit that client portals offer is the accessibility of documents and network. Kepczyk (2008) and Girsch-Bock (2015) add the secured data access. Kepczyk (2008) adds that portals enhance processes, and Grönstedt points out benefits in faster communication. Another bonus is that creating a portal login link on the company website is an opportunity for marketing (Girsch-Bock 2015). Large files are also easier to transfer, and Kepczyk (2008) states that sending documents by email creates a risk, as they go through several unknown servers.

Higgins (2011) defines that defining a strategic focus for the portal, and gathering a comprehensive insight of the portal content, is relevant when building a portal. Portal strategy needs to take into account all the relevant people and departments in the organisation. Higgins defined stages of portal development (Figure 7, Higgins 2011). Grönroos (2007, 464) also defined that technology needs to be accepted by the staff, so that it does not affect the client relationship negatively.


Figure 7: Stages of portal development (Higgins 2011).

The first stage is to have all the client information and documents online. Kepczyk (2008) adds that documents should transfer smoothly, bi-directionally, and the portal should be easy to use for the clients. Also, Grönroos (2007, 445) emphasizes the importance of extranet's easy navigation, and search for information to be able to turn this into usable knowledge. The second is to define the touchpoints and workflows connecting the company and the client to minimize all the procedures which cannot be automated. The third important element is to have a single sign-on, login, access to the portal, as it eases client's access to the portal daily. The fourth strategic step is to decide, which systems and application the company sees are strategically important in the client relationship management.

It is to be noticed that client perspective is very narrow in Higgins view of portal development, and this applies to all the literature mentioned above, even though he mentions the portal's helping feature. The discussion in this chapter, and the scarce portal/extranet related account management literature, refers that scientific studies in customer centric and client relationship perspective in business-to-business data management is still taking baby steps. As customer-centrism is a rare piece of puzzle in the business-to-business client data management, linking these two is important. To be able to understand how customer has moved to the centre of the business, theoretical background for the transforming service business is discussed in the next chapter.

## 2.3 Developments in service business towards Customer-dominant logic

The transformation in business-to-business is currently happening in many levels, as we have presented in the earlier chapters. The theory part started by discussing client relationship evolution and importance of retention, and later dived into digital transformation. They both lift the customer into the centre of transformation, which underlines the phenomena of customer centricity in current service business. In order to understand the background of this transformation, this chapter is dedicated to the different approaches in service business and to the relevance of Customer-dominant logic for this study.

The transformation from mass-production into service centred business thinking has pushed the focus from products to a holistic thinking where services and products integrate (Gummeson & Grönroos 2012) and can be seen as one offering (Heinonen & Strandvik 2015). Service business logic (Heinonen & Strandvik 2015) was long dominated by goods-dominant logic (GDL) and provider-dominant logic, until the discussion of goods versus services started in the 80-90's (Gummeson & Grönroos 2012, Heinonen & Strandvik 2015, Vargo & Lusch 2014, 4-91, 2004b). The Table 1 below, adapted from Galbraith (2011, 9-11) and Shah, Roland, Parasuraman, Staelin and Day (2006), describes the differences between product-centricity and customer-centricity. Product-centricity, with its transaction-oriented business, has changed to customer-centricity with tailorable solutions and services, in which focus is on the customer relationship management, customer satisfaction and retention, as well as constant solution development.

| | Product-Centric | Customer-Centric |
|---|---|---|
| **Goal** | Sell customer the best product | Serve customers the best solutions and services |
| **Main offering** | New products | Personalized services and products |
| **Orientation** | Transaction oriented | Relationship oriented |
| **Structure** | Product-profit centres | Customer segments and teams, customer managers |
| **Processes** | New product development | Customer relationship management & solution development |
| **Measures** | Market share<br>Number of new products | Customer share of most valuable customer<br>Customer satisfaction<br>Lifetime value of a customer<br>Customer retention |
| **Management criteria** | Portfolio of products | Portfolio of customers |
| **Customer knowledge** | Customer data as a control mechanism | Customer knowledge is a valuable asset |

Table 1: Product-centrism versus customer-centrism (Galbraith 2011, 9-11; Shah et al. 2006)

According to Schneider and Stickdorn (2010, 28), it is all about the interaction, and no longer about the tangible goods but rather about services combined with tangible elements. Interaction between the service provider and the customer is what creates a service. Customer-centrism describes a customer-oriented approach: organising around the customer with a customer-centric mindset, as Galbraith (2006, 5-8) defines it. This view is close to how Fader (2012, 9) sees customer centricity: defining the most valuable customers and their needs and aligning the company's services to fit those needs.

**Approaches in service business: SDL, SL and CDL**

Three theoretical approaches give valuable insight to customer centricity: *Service-dominant logic* (*SDL*, Vargo & Lusch 2008), *Service logic* (*SL*, Grönroos 2011) and especially the Customer-dominant logic (CDL, Heinonen et al. 2010). SDL is the one of the most cited literatures in business, and it is suggested to be considered as general theory of Service Business market and Value Co-creation (Vargo & Lusch 2017). SL offers also theoretical implications and advice for managers in strategic decision-making (Grönroos 2007, 469; 2017). Now the focus is changing towards the customer. Customer logic is defined by Heinonen and Strandvik (2015, 478) as "customer's idiosyncratic reasoning and their sense-making about appropriate ways for achieving their goals and conducting their tasks". CDL is a managerial approach, serving a holistic view of marketing as "a foundation for business", not only a mere function inside the company (Heinonen & Strandvik 2015). In this approach, the customer-related aspects dominate the business. The managerial mindset has to be transformed to see the customer in the centre of all decisions.

The focus from goods changed to services, and now it is moving towards customers. Three paradigms in Service Marketing depict the evolution starting from goods-dominant logic (see Figure 8, Gummeson & Grönroos 2012): The Goods Paradigm, The Goods versus Services Paradigm and Integrative Service Paradigm. According to Gummeson and Grönroos (2012) Service dominant logic (SDL) and Service logic (SL) are approaches of the Integrative Service Paradigm and in this study, we suggest adding the Customer-dominant logic (CDL) to the same realm; as according to Anker, Heinonen and Strandvik (2015) and Anker, Sparks, Moutinho and Grönroos (2015), CDL is also a distinctive service approach instead of defining it as an extension of SL. Heinonen et al. (2010) claim that SDL together with GDL represent the provider-dominant logic, as the emphasis in SDL is on what is provided to the customer, but in this study the definition of Vargo and Lusch (2004b) is used. They don't see provider-dominant logic playing any part in Service-dominant logic. SL and CDL are both approaches (Heinonen & Strandvik 2017) of the Nordic School of Service Management (Gummeson & Grönroos 2012).

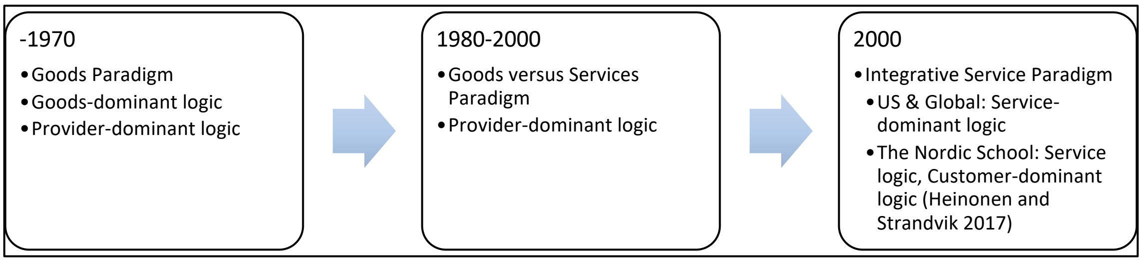


Figure 8: Paradigms in service business (Gummeson & Grönroos 2012)

Heinonen and Strandvik (2015) describe the positioning of different service perspectives and their relations in Figure 9, which reveals the fundamental differences between the current three service perspectives: SDL, SL and CDL. SDL, defined by Vargo and Lusch (2017, Lusch & Vargo 2014, 2004b, 2008), and SL approach, defined by Grönroos (2011), both focus on the role of service and on the interaction between the provider and the customer, whereas CDL is positioned to the customer's side, their lives, and business, and defines the product or service as an overall offering covering products, services, and even the provider-customer relationship (Heinonen et al. 2013; Heinonen & Strandvik 2015). CDL differs from SL and SDL in its distinction between provider and customer, whereas SDL and SL make a difference between products and services (Heinonen & Strandvik 2015).

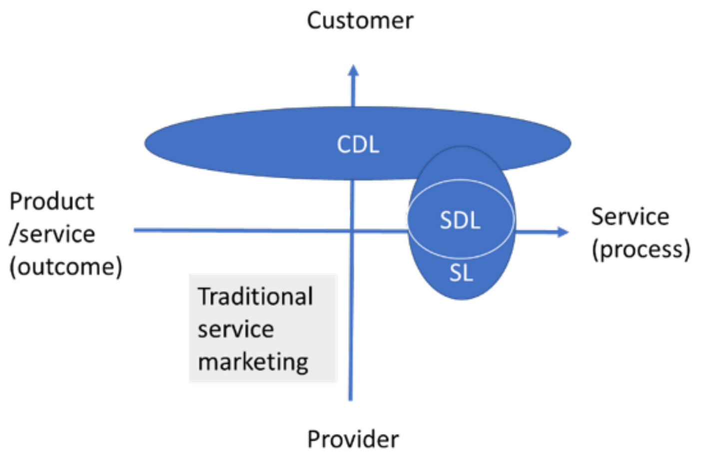



Figure 9: Matrix of Provider-Customer & Product-Services (Heinonen & Strandvik 2015)

One major aspect in these approaches is how value is formed and whether it is co-created, how the role of customer and provider is perceived in the service process, and who defines value (see Figure 10 below). In the traditional goods-dominant logic the provider created value, value was exchanged, and the customer was considered as a passive actor using products (Womack & Jones 1996, 16; Heinonen et al. 2010; Vargo & Lusch 2008, 2014, 91). This definition of value is contradictory to Service-dominant logic (SDL), Service logic (SL) and Customer-dominant logic (CDL). Figure 10 is described in the text below the figure on next page.

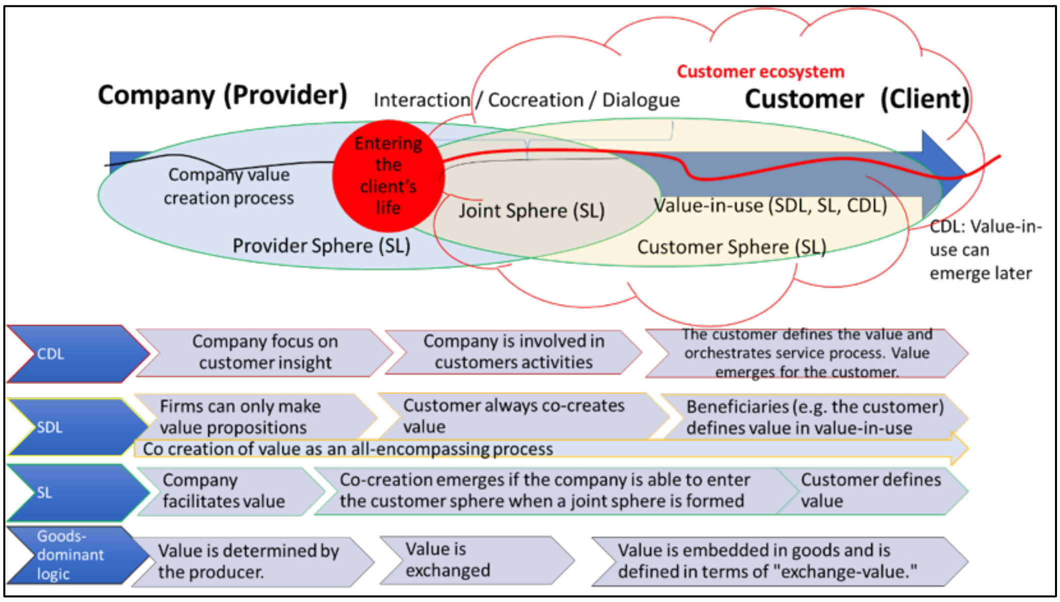



Figure 10: Service process from value perspective in CDL, SDL, SL and GDL (Vargo & Lusch 2008, adaptions from Grönroos and Voima model 2013, 141; Grönroos 2011, 244; Heinonen et al. 2013, Heinonen & Strandvik 2015)

**Value formation and value-in-use**

In **CDL** (Heinonen & Strandvik 2015), value is formed in the customer's context by the way customer's actions and feelings process when they interpret, experience, and incorporate the offering in their daily life. This forms value-in-use (Heinonen et al. 2013; Heinonen et al. 2010), which is an overall comprising value formation, where value can emerge now or later, has an emotional side with mental activity, and can change and be reinterpreted (Heinonen et al. 2010). The red curve in Figure 10 describes changes in value formation, and how it can continue in the future. According to Heinonen and Strandvik (2015), it is the customer who orchestrates whether provider's offering is interesting or not and whether interaction emerges. The mechanism behind is what, how, when, where and who are influencing the interaction. In CDL value is defined in the customer's side.

In **SDL**, according to Lusch & Vargo (2014, 4-91; Heinonen et al. 2010), value is co-created during the whole service process by synergic benefits between several actors and resources in a service ecosystem where everyone related to service is an active co-creator. Vargo and Lusch (2008) add that the system is full of different networks interacting and exchanging. Value is shifted from the provider to the beneficiaries of the service, the ones who receive the value and define it as value while using it.

In Service logic, **SL**, customer always perceives and defines value (Grönroos 2011) and what makes customers' lives *"better off than before"* (Grönroos 2008, 303) is the value for the customer. Grönroos (2008) points out how value is seen differently, as we are all different from each other. We do not estimate value in the same way, as we think, live, feel and act differently. Grönroos (2011) adds that value can accumulate and be destroyed in the value-creation process, on which the company can have an influence. Therefore, the facilitative role of the provider is important to recognize and not to neglect. Grönroos and Voima (2013, 141) defined three value creation spheres (see Figure 10). In the provider sphere providers can create potential value. In the customer sphere the client creates value independently and the company can support this e.g. by added services etc. When a client lets the company enter the customer sphere, a joint sphere is created. In this sphere, the client can co-create value in interaction with the company.

To sum, SDL, SL and CDL all see that customer is the one who defines value in value-in-use. Vargo and Lusch (2008) prefer using the definition of beneficiary instead of customer in SDL as the beneficiary might be the one to whom the customer is buying the service. The difference is in how these approaches see the role of the provider and co-creation.

**Co-creation**

According to the SDL approach customer perceives and defines value based on value-in-use, and is also always an actor in co-creation (Vargo & Lusch 2017). Grönroos (2011) criticises the all-encompassing value co-creation definition of SDL, and states (2008) that the customers themselves are the value creators, whereas companies can become value co-creators with its customers only if provider-customer interaction emerges. As Grönroos and Voima (2013) state, the definition is unclear and too vague, encompassing everything as co-creation and therefore they propose to define value creation as value-in-use in the customer's sphere. SDL sees co-creation in everything; SL in the interaction between the company and client but in client's terms; whereas the role of co-creation is not underlined in CDL, in which value is formed by the customer and not by co-creation (Heinonen et al. 2013). Heinonen et al. (2010, 537) defines co-creation as "an element of service by creating a part of the customer experience", which depicts it as an acting part of the process. In CDL the focus is on the customer, not in co-creation, but it can be a part of the process.

The basic differences are that SDL sees that companies can provide value, and that co-creation comprise the whole service process in which customer is always a co-creator (Vargo & Lusch 2008). The core difference between Service-dominant logic and Customer-dominant logic is that SDL aims to involve the customer in the co-creation of the service, whereas CDL tries to involve the provider in the customer's life (Heinonen et al. 2010). According to Service logic (Grönroos 2011), a company cannot provide value, but it can facilitate value formation by trying to enter the customer's context and life. Co-creation is also possible only if this access into customer's sphere happens, and if interaction between both parties emerge (Grönroos 2011). SDL and SL define co-creation as part of value formation, whereas CDL defines that value is possible only in the customer context (Heinonen & Strandvik 2015), and does not take any part in the discussion on what co-creation is.

**Different views of the service provider's role**

According to Grönroos (2011), companies are the ones benefiting mainly from co-creation, not the customer. This is the only way they can facilitate customers and be a part of their value creation. When it comes to offering value, according to SL, companies can facilitate value but not offer it. In SDL, companies cannot deliver value but can create value propositions (Vargo & Lusch 2008); whereas CDL sees that only the customer can define what is value, and companies cannot propose value, but they can try to understand how it emerges in customer's lives (Heinonen & Strandvik 2015). By gaining customer insight, companies can understand what the customer sees as value, which can be considered as the basis for profitable business processes and design creation. In CDL, value formation is emerging both in the customer's side (red line in Figure 10), as well as in the provider's side (the black line in the Figure 10); the point is to understand that the provider's value formation depends on the customer logic, according to which they form their business logic and strategies. CDL emphasizes the ecosystem surrounding and influencing the client's life, business and tasks in daily life. The red cloud in Figure 10 describes the surrounding influence of the customer ecosystem. Gaining insight and entering client's life is the key to CDL. (Heinonen & Strandvik 2015.)

**Some similarities** between CDL and SL can be defined. According to SL, companies need to access customer's lives to co-create value (Grönroos 2011), whereas in CDL, the companies need to find out ways to access customer's life to learn from it (Heinonen et al. 2010; Heinonen et al. 2013; Heinonen & Strandvik 2015). Another similarity seems to connect their idea of improving lives. The two approaches seem to have the same type of helping ideology: Service logic (SL) defining value for customers as making them *"better off than before"* (Grönroos 2008, 303), and CDL defining that companies aim to improve customer's lives by creating an offering, which can be formed into value-in-use by the customer (Heinonen et al. 2010).

**Customer-dominant logic**
In CDL (Heinonen & Strandvik 2015), the factors influencing the formation of customer value-in-use are described in the Figure 11 below. It is created by Heinonen and Strandvik (2015) and depicts how customer's lives are full of different activities and experiences, which can be related to the specific service. Earlier experiences, goals, tasks to be done, and other's opinions and experiences influence the formation of value-in-use. Heinonen et al. (2010) add that value-in-use is not limited to the interaction arena, but extends far beyond and can be formed later in other occasions. According to Heinonen and Strandvik (2015), what happens in the interaction arena is that customer collects information about different providers, whereas the provider gathers insight of customers and markets. Activities with the customers can be direct or indirect. Communication with provider is also a relevant part. These three: information, activities and communication form the interaction arena. According to Heinonen and Strandvik (2015), company's strategy and service design are mostly invisible to the customer, and service design is only one functionality among others. Yet, in this study, it is suggested to view service design as an overall way of doing things in a company, following Schneider and Stickdorn's (2010, 36-45) holistic and co-creative view of service design. They see that service design is a mindset and way of doing things in the whole company, connecting all the relevant people needed from all roles and levels, using service design methods, and going all the way to the real customer. According to Heinonen and Strandvik (2015), understanding the way value is formed, its mechanism, offers business potential to e.g. business functions such as service design. In this study, this claim of forming value can be seen true, yet service design is seen more than a function in a company. It should comprise the overall doing of things in business, and be the leading mindset together with the Customer-dominant logic approach.

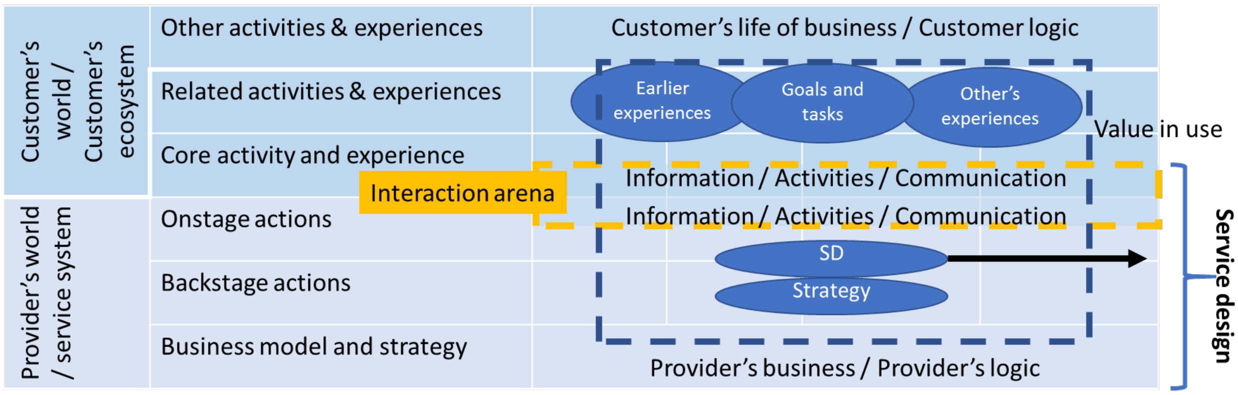



Figure 11: Factors influencing the formation of customer value-in-use. Adapted from Heinonen and Strandvik (2015)

From all the service business approaches, Customer-dominant logic is chosen as the main approach for this study, as it is the only approach that clearly places customer in the centre of business (Heinonen et al. 2010). This study aims to understand, how the client portal could be embedded in client's life, what kind of activities and practices the service should be tailored at, and how is the current client relationship emerging in their work, the way Heinonen et al. (2010) and Heinonen and Strandvik (2015) suggest. They point out that companies should know, how strong the client relationship is, and how the company's service emerges in customer's lives. Heinonen and Strandvik (2015) use a good example of the core meaning of CDL: a good singer lacking presence when performing a song does everything by the book, but is missing the core of connecting to the audience, who form the value when feelings process while interpreting, experiencing, and incorporating the performance. In short, the Customer-dominant logic is about company jumping into customer's shoes, learning to know them, understanding their world in whole: needs, goals, motivations, context, activities, practices, business, experiences, plus the whole ecosystem with its stakeholders and even family background. It is participatory minded and co-creative, where the customer rules and defines the value (Heinonen et al. 2010; Heinonen & Strandvik 2015).

In order to understand why service design, the main focus and process of this study, has become so prevalent, a jump to the history was done in the beginning of this chapter to clarify the story behind service design. In addition, understanding how service business sees customer's role, provider's role and how they are connected, adds knowledge on how customer oriented services can be created, reminding that the main goal of this thesis is to create a customer-centric digital concept. In this chapter, the evolution of Goods-dominant logic and Provider-dominant logic to Service-dominant logic and Customer-dominant logic were discussed. Also, all the three service business approaches, SDL, SL and CDL, were presented and their differences discussed. They all shape today's service business. All of them are connected to customer-centricity, but the one reflecting the rising power of customers is mainly

CDL, and it is also chosen as the main theory shaping the empirical part of this thesis. SDL, SL and CDL also define co-creation differently. Understanding the different views was important, as one question in this study is to find answers to how collaborative service design methods and tools fit into a traditional business context. The co-creation defined by Vargo and Lusch was chosen to this study, as the portal is created to serve both the business clients', as well as the internal clients', the account managers', needs, and they both interact in the process, which does not have a clear border between the company and the client, as the company is one of the clients. Next chapter is dedicated to service design, the main approach of this thesis. Other related disciplines under the same chapter are also discussed, as they are often seen used together with service design (e.g. Koen 2015).

## 2.4 The background of Service design: concepts and process

Schneider and Stickdorn (2010, 29) describe the fundamental premises of service design as an interdisciplinary approach influenced by various disciplines, as well as their methods and tools. Therefore, the focus of this chapter is to discuss the field of service design, as well as to describe other disciplines, as service design has similarities with e.g. Lean Principle, UX Design, and other disciplines (Schneider & Stickdorn 2010, Cooper et al. 2016, 34).

Service design and its process is about improving services: improving an existing service or creating a new service (Kuosa & Westerlund 2012, 25). Mager and Sung (2011) define that service design is shaping services co-creatively to fit customer's needs, an interdisciplinary strategic approach for service offering positioning. Service design is used to create services that are useful, usable and desired from the customer's perspective, but at the same time efficient from the provider's perspective. They see services as a bundle of influencing factors, and point out the importance of using stakeholder maps and customer journeys to visualize the system. Service design with its customer-centric nature focuses on the customer and takes them along in the co-creative service design process (Schneider & Stickdorn 2010, 28-31).

The realm of service design is filled with different definitions and approaches (Schneider & Stickdorn 2010, 27-33). This is discussed in the next chapter. Lean principle is discussed in its own chapter, as it has a lot of similarities with service design (Mueller & Thoring 2012).

**Definitions and approaches**

Some might still confuse service design with so called "mug design", but there is a strong shift to designing immaterial elements such as services (Kuosa & Westerlund 2012, 25), and instead of talking about service design, one might hear talking about Co-design and Design Thinking. Service Design concept has European roots, whereas Design Thinking is an American approach originally invented by the design agency IDEO. In this study, these two concepts are used as synonyms.

There are several service design and customer-centricity related concepts, e.g. user-centric. User-centricity in this study is based on Schneider and Stickdorn's definition (2012, 28-31) of a user-centric service design, which puts the customers in the focus and involves them in the service design process. It used as a synonym for customer-centricity in this study. A mindset of craving for customer insight and knowing, how they talk about it and describe it, the language, is relevant in both customer-centricity and user-centricity. The traditional user-centric view is an American approach in which, according to Sanders (2008), the user is observed and ideas from the user's needs are gathered but participation in design might not happen, which is the core in Schneider and Stickdorn's concept and a European approach. User-centrism is an American definition, whereas participatory approach is European (Sanders 2008). Human-centered design goes deeper into discovering people's dreams, needs and behaviours (Koen 2015; Meroni & Sangiorgi 2011, 39). When it comes to the principle of UX design, according to Interaction Design Foundation (n.d.), it encompasses various aspects of design from ideas to data flows and digital user interface design. The core is designing the service experience. UX Design is about understanding the users and discovering their needs, creating user personas, testing, and prototyping. Pennington (2016, 20-22) brings up a new definition, "the customer intelligent company", which seems to be a mixture of customer-centricity and company-centricity. Pennington points out, how the company should focus on investing in the critical touchpoints that really make a difference. He is sceptical about customer-centricity. He seems to imply that companies fool themselves by thinking that they can achieve their business goals by having only the customer in the centre of their business strategies and all choices. He also shortly mentions a term, client-centric, but does not define it.

Lean principle (Ries 2011) has also raised a lot of interest in companies trying to enhance their innovative competences, and it also has a role in this study when developing the client portal concept. Therefore, as the whole empirical process is based on service design, the Lean principle including Lean Startup is discussed in the next chapter. The interdisciplinary nature of service design combining different disciplines (Schneider & Stickdorn 2010, 130-135) can be seen as allowing to add other disciplines under the umbrella of Service design. Also, this notion is supported by the fact that the same tools and methods are used in service design and Lean principle, e.g. Business Model Canvas and Value Proposition Canvas (Koen 2015) and "five whys" (Mueller & Thoring 2012, 158). The role of Lean Startup versus service design is studied by e.g. Koen (2015) and Mueller and Thoring (2012). Mueller and Thoring (2012) define them as user-driven innovation strategies which can be connected into a model of "Lean design thinking". According to them (2012, 156-157) both Lean Startup and Design thinking focus on users and improve their ideas with constant testing and prototyping. There exist some basic differences: whereas Lean Startup has a set business idea from the beginning, service design defines it after an extensive research during the process, not in the beginning (Mueller & Thoring 2012, 157). As it is discussed above, service design can be seen as containing parts of Lean principle, even though it can be seen as its own approach as well. What led to the development of Lean principle? And what is Lean principle and Lean Startup? These issues will be discussed in the following chapter.

**Lean principle**

The fast pace of digital transformation has brought up new ways of working. The principles of Lean thinking have their roots in Japanese Toyota car manufacturer company pioneering in Lean manufacturing (Ries, 14; Womack & Jones 2003, 9-12). The principles were defined by Womack and Jones in 1996, and further developed into concepts such as, for example, the Lean Startup (Ries 2011), the Lean Entrepreneur (Cooper et al. 2016), and the Lean Enterprise (Owens and Fernandez 2014). The basic idea of Lean is to remove activities which do not create any value and can be seen unnecessary (Cooper et al. 2016, 35). This so-called waste in the production of value can be resources, such as time, money, people, or e.g. used mental energy.

The first principle is to define the exact value offered, not forgetting to reflect it together with real customers and their needs in a dialogue (Ries 2011, 50-57; Womack & Jones 2003, 16-19, 32), as customers are the best source in defining the possible values, flaws and improvements in services or products. The second is to describe the value stream for each product and service, and to define the steps which create no value (Womack & Jones 2003, 19-21, 37; Ries 2011, 54-56; Cooper et al. 2016, 35). Cooper et al. (2016, 116-117) have designed canvas tools for this purpose. According to Womack and Jones (2003, 44-52) the interaction between phases, people and actions should be in the focus, and mastering the techniques in the value stream is essential. They add (2003, 21-24) that the third principle is to create a flow in the value stream, which requires transparency of every step in the stream and flexibility of the process and the organisational boarders. The fourth principle by Womack & Jones is to create services and products that the customer wants, what they “pull” from the supplier (2003, 24-25, 67, 194-195). Womack and Jones (1996, 71) state: “Don't make anything until it is needed; then make it very quickly.” This resonates strongly with Ries’ (2011, 82-83) concept of a Minimum Viable Product (MVP). The last principle is to pursue perfection by continuously refining value streams to avoid non-valuable work and waste, and by making things even better (Womack & Jones 2003, 25-26). Learning from the wasted ideas and time is seen valuable (Cooper et al. 2016, 37; Ries 2011, 54). A company following these principles is a Lean Enterprise (Womack & Jones 2003, 276).

Eric Ries (2011, 18-19, 36-39) developed the Lean Thinking to fit for everyone with a start-up-mindset (Cooper et al. 2016, 20), regardless of the size of the company. He created five principles which base on the transformative mindset in approving uncertainty, constantly learning, measuring, and innovating. Instead of sticking into one plan, Ries (2011, 32-33, 80-81) suggests using the Steering wheel model, Build-Measure-Learn, in which the idea is to constantly iterate and change course, called a pivot (Ries 2011, 147). Everything should base on validated learning, understanding, and accepting failures (Ries 2011, 46). Ries (2011) introduced also the Kanban diagram, which is a tool for visualising and mapping tasks in progress into four columns: backlog, in progress, built and validate (Ries 2011, 137-139).

**The idea of MVP** is to reduce the time-to-launch of the product on the market, make fast prototypes, test them, as well as constantly ask customers for feedback and interpret this feedback (Ries 2011, 82-96). A customer oriented concept can only be created by hearing clients and their needs. As the goal of this thesis was to create the client portal concept to fit the customer's needs, the concept was created as a minimum viable product. Client portal testing phase will run after this concept project, but asking for feedback and ideas from the customers to the concept was the key in this study. According to Baltes (2016), customers' feedback should be constantly used in improving the test version, as well as developing the service after the official launch, and Ries (2011, 106-133) adds that customers are usually the ones showing the right direction for the optimal product, and therefore they should test the minimum viable product as early as possible. The whole idea of MVP is to enter the markets as soon as possible even with an imperfect product or service, as the service might be already out-of-date if the launch is done only after the service is completely ready. In digital products, the feedback from customers is usually related to the user interface, User Experience (UX) design and functionalities. This feedback is also relevant in order to achieve the goal of this study.

A glimpse of customer-centricity can be seen in the book by Womack and Jones (2003, 16-19, 32), when they talk about the importance of having a dialogue with the customer; yet they do not go into any detail on what it could be, and how companies should have this dialogue, except for asking feedback and testing. Customer-centricity has more presence in books written by Ries (2011) and Cooper et al. (2016) about the Lean ideology. Ries (2011, e.g. 51-54, 65-73,113) points out the importance of testing ideas with real customers, and together with Cooper et al. (2016, 118-150) he describes various tools and methods in customers' interaction, experiments and analysing the results. He adds that listening to customers is necessary and should not be neglected by companies, even if the feedback is not what the company wants to hear (Ries 2011, 111).

**Main elements in service design process**

To understand how various service design processes differ from each other, and to be able to choose a suitable service design process for this study, several models of service design processes were studied (Table 9, page 41): the AT-ONE by Clatworthy (2011), an iterative process by Schneider and Stickdorn (2010, 122-123), the Double Diamond model by Design Council UK (Davies, U. & Wilson, K. no date), a design process diagram by Meroni and Sangiorgi (2011, 239), Kaivo-oja's process (2013, 71-73) etc. First, to get a picture of the service process in general, main elements of service design processes are discussed next. Second, a comparison of the above-mentioned processes is presented.

Customer-centricity is the key element of service design. Schneider and Stickdorn point out that the process should start by defining the problem and searching the grounds. Service designer should see the company from the point of view of the customer. In this exploration and discover phase it is important to know the agenda of the company and the reason for using a service designer in the first place. (Schneider & Stickdorn 2010, 122-123, 128-130.)

Customer oriented service development must be seen in a larger scale as customers are related to other stakeholders influencing their decision. Jari Kaivo-oja states (2013, 72) that **interdisciplinary** thinking is the basis of making service science, because service is an interaction of various stakeholders, people, technologies, and business. This is supported by Heinonen et al. (2013; 2015), who see customer's world as ecosystems which include families, stakeholders etc.

**Co-creation—**another key element in all service design processes. As service is an interaction of different parties, so is the process itself an interaction of different parts. Co-creation is a commonality between all the service design processes. Especially Alastair concentrates on the aspect of co-design. Customers, organisation and other stakeholders need to participate and commit to the process for it to succeed. Kaivo-oja (2013, 79) sees service design as a process of co-creation, and according to Clatworthy (2011, 17), most development projects consist of **cross-functional** development teams and designers. These teams consist of relevant stakeholders from diverse functional areas in and outside the organisation. This outside the organisational nature of service design is linked to the **inter-organisational** functionalities in service design (Petković & Lazarević 2012), which is related to the rising awareness of gaining competitive edge by partnerships. Petković and Lazarević add that the coordination and integrations of inter-organisational functionalities are critical factors, as well as a well-designed **intra-organisational** design and processes. Simon Clatworthy (2011, 18) called all stakeholders "Actors". These actors are the people or networks in the **cross-functional teams** that provide improved services (Clatworthy 2011, 18; Schneider & Stickdorn 2010, 136**). Cross-disciplinary teams** can consist of a very heterogenic set of experts from psychologists to sales managers, and from dramaturges to graphic designers (Kuosa & Westerlund (2012, 26), not to mention UX designers.

Another commonality in service design processes is **user participation**: service users and customers influence and participate in the ideal design process. To support this Miettinen (2009, 10-28) and Alastair (2013, 104-105) emphasise how co-design and co-production are important factors in service design. Co-design is a form of co-creation, where design professionals and people with no previous knowledge participate in the design process with a common goal, improving the service design and creating value. (Valtonen & Miettinen 2012, 6-9.)

One key element of the design process is in its **iterative nature**. Design develops in steps that might need sometimes jumps back to the earlier phases. Compared to a linear traditional process view, design process can look like an octopus, having lines going from one step to another and back, and consisting of overlapping phases with same methods (Tschimmel 2012, 5). The process involves a great deal of flexibility and innovative attitude with a playful touch. This might frustrate people, who are used to quick solutions. The iterative nature of service design fine-tunes the ideas into working concepts, which give so much added value to customers that they want to buy them. The iterative nature of service design differs it from traditional processes, which have a linear process model. As Schneider and Stickdorn point out (2012, 122-127), a service design process can jump back to the start without going too far if something does not match. The cost of designing a service in a rush is far more expensive than making an iterative round. In service design mistakes are not mistakes, unless you do not learn from them. Iterations are a normal part of service design.

Service design tools are flexible tools: the same tool can be used in different phases of the process depending on the needs of the service design team. According to Schneider and Stickdorn (2010, 148), explorative tools should be intimate and increase commitment to the project. The aim is to discover and develop bright new customer insight to a service. This can be done, for example, by customer journey maps, stakeholder maps, mobile ethnography, storyboards and personas. Polaine et al. (2013, 4) point out that qualitative research methods mainly collect customer insight. It can be in-depth interviews, interviewing end user customers alone or in pairs, or interviewing business-to-business customers. They also (2013, 41) propose, that insight knowledge can be also gathered by asking people about their actual lives and everyday experiences.

To sum up, most of the service design processes are:

1. Based on research and problem seeking
2. Customer-centric (customer insight) and participatory
3. Interdisciplinary

4. Co-creating and collaborative
5. Inter-organisational
6. Iterating
7. Searching through converging and diverging
8. Innovating and creating
9. Developing and improving
10. Prototyping and piloting

**Service design processes**

Table 2 describes how most service design models include a research and exploring phase for finding the reasons and needs for service improvements or new services. Exploration is followed by an innovative and creative phase. This is when the concept is defined. Creation phase leads to prototyping and testing and in the end to an implementation phase.

| Phases | 1 | 2 | 3 | 4 |
|---|---|---|---|---|
| Double Diamond (Davies and Wilson n.d., Seymour 2010) | **Discover** | **Define** | **Develop** | **Deliver** |
| Stickdorn & Schneider (2010, 122-123) | **Exploration** | **Creation** | **Reflection** - Prototyping | **Implementation** |
| Meroni & Sangiorgi (2011, 239) | **Analysing** | **Generating** | **Developing** | **Prototyping** |
| Kaivo-oja (2013, 71-73) | **Problem identification** | **Creative Solution** (Idea invention) | **New service design/s and architectures** (Including a new brand identity) | **Implementation** (service innovations and design/s) |
| Alastair (2013, 104-105) | **Problematizing** | **Experiencing** | | **Solutioning** |

Table 2: Different service processes

What separates different service design processes, is what they emphasise. Schneider and Stickdorn's model (2010, 122-123) and the Double Diamond model (Seymour 2010) emphasise the meaning of understanding the problem in the research phase. The Double Diamond process view shows the converging and diverging nature of the service design process. It shows how the process can widen and focus, depending on the project's phase. Kaivo-oja (2013, 71-73) points out the importance of using a business model. Schneider and Stickdorn emphasise (2010, 130-135) the interdisciplinary nature of service design. All processes seem to be iterative, in the sense that feedback and knowledge is constantly evaluated. Some emphasise it more, some less. Schneider and Stickdorn also point out how important prototyping is when designing a service, and also for iterating and gathering feedback. As this study was focused on creating a concept, implementing a system did not come into question. Therefore, Schneider and Stickdorn's model, as well as Kaivo-oja's, were not suitable ones. Also, Alastair's process did not fit to the study, as it misses the diverging and converging type of nature of service design. Meroni and Sangiorgi's model and the Double Diamond model were the two most promising ones. Meroni's process ends in prototyping and Double Diamond into delivering.

As in this study the goal was to deliver a concept and not necessarily to prototype it, the Double Diamond model was chosen. It contains all the relevant steps of service design for this study and is easy to comprehend also visually. The steps in the Double Diamond model are "discover", "define", "develop" and "deliver" (Schneider & Stickdorn 2010, 126). The Double Diamond design process model was originally designed in the UK by the Design Council (Davies & Wilson n.d., 6). It is iterative and starts with an idea or an identified problem. Concept definitions follow the problem identification. The goal is to find innovative solutions and test and launch the service in the delivery stage. (Davies & Wilson n.d., 6; Kaner, Lind, Toldi, Fisk and Berger 2014, 3-21; Schneider & Stickdorn 2010, 126; Seymour 2010.) The process model is described more in depth in Chapter 4.1.

The reason why service design process was presented in the end of this whole theory part is that the empirical part is based on it. As service design process is customer-centric with its participatory and customer focused approach, it supports the main goal of this thesis: creating a customer-centric digital business-to-business client portal concept. It helps finding answers to the research development questions: what kind of needs clients have, what challenges they face in their daily work, and what relief and benefits they expect to receive by using the portal. As Schneider and Stickdorn (2010, 148) state, service design tools are explorative and intimate enough, and therefore they support the goal of discovering needs, challenges and assumed benefits of the portal. Their co-creative nature also engages people, which is needed in order to create a concept that can later be turned into a system that is really used. In addition, the interdisciplinary and inter-organisational nature of service design fits to this study, as the portal can also be seen connecting interdisciplinary knowledge from all the various experts around the company, and to build it, they need to be involved.

Before moving to the empirical part this thesis, a broad theoretical framework is presented in the next chapter. As the theoretical part of this study contained several topics influencing the transformation of today's service business, it is seen that an overall view of their relations to each other and to the thesis work is relevant to the reader.

## 2.5 The theoretical framework of this study

The goal of this study is to find answers by using service design to the following research question: “customer-centricity—how can it be used in building a digital business-to-business client relationship tool?” The theoretical part focused on topics related to the transforming business-to-business context from the customer-centric perspective. As service design is a multidisciplinary discipline (Schneider & Stickdorn 2010, 54-67), and as portal creation is related not only to service design, but also to client relationship management, digitalisation, service business and lean development, all those topics were covered. A theoretical framework was created based on the theories and literatures discussed in the previous chapters. It visualises and shares the thesis writer’s understanding of how these theories link to the main goal of building a customer-centric business-to-business client relationship tool. In addition to being a theoretical synthesis, it acts as a lens through which the thesis writer sees the connections of the topics covered in the theoretical part to the empirical part. Figure 12 below is the framework:

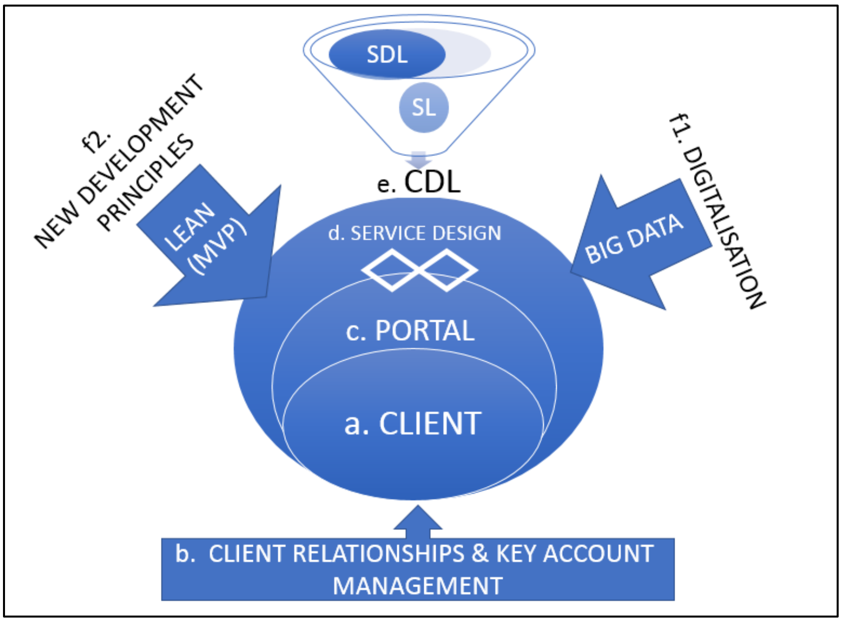



Figure 12: Theoretical framework of the study

The framework depicts how the client (a) is in the core of the concept creation. She is in the centre of the service as she is the one defining the value-in-use (Heinonen et al. 2013; Heinonen et al. 2010) of the service. In addition, according to Service logic (Grönroos 2011), the one deciding whether the company has any touchpoint with the client is the client himself. Further on, Grönroos’ Service logic adapted in client relationship management implies that the client is the one who defines whether there is a client relationship or not, not the company. Client is the one using the portal together with the account manager in the client relationship (b).

As account management is the core strategic function in companies (Payne & From 2005), developing client relationship management should be in focus. This requires insight of the customer's ecosystem (Heinonen & Strandvik 2015), which is relevant for the business in order to keep up the pace in competition, and to understand the clients' changing needs.

The client relationship should be a platform of several people and systems working together seamlessly supporting the account manager, but instead of the account manager being the only one connected to the client, the other functions should be linked to the client, as Woodburn and McDonald (2011) describe. This was depicted in Figure 4, page 20. The role of the account manager is to be the main connection to the client, but also to pull the strings, so that other people can step forward and this way be part of building an interdependent relationship with the client.

The portal (c) can act as a facilitator of this interdependent relationship, so that the face-to-face communication can remain as top priority. It is the platform which should be built by understanding all the surrounding influencing factors and service business theoretical point of views, but the client should always be in the core.

Service design methods and process (d), the Double Diamond model (Seymour 2010; to be presented in Chapter 4.1), is used in developing the portal, so that it serves the clients in the best possible way. Therefore, knowing the client's needs and understanding their problems is important (Schneider & Stickdorn 2010, 122-123, 128-130).

The customer-centric approach is theoretically supported (e) by the Customer-dominant logic (Heinonen et al. 2010). Service logic (Grönroos 2011) and Service-dominant logic (Vargo & Lusch 2008) also have their influence. The model of Service logic created by Grönroos and Voima (2013), with its joint sphere where the provider and the customer are connected, describes the connecting nature of the portal. Service-dominant logic influences with its concept of co-creation (Vargo & Lusch 2017). According to the theoretical framework, CDL is the main theory, but SL and SDL have an influence. This is also due to the fact that SL and CDL have been developed under the influence of the mainstream approach SDL by Vargo and Lusch.

The arrows of digitalisation (f1) and new development principles (f2) describe how the transformation in business-to-business context is impacted by the digital wave and increasing amount of data to use, the so called Big Data. Data plays also a big role in the portal. The company can use the portal as a connector of data from several sources and use this Big Data (De Mauro et al. 2015) in creating valuable insight. New development principles, such as Lean

Startup and its concept of Minimum Viable Product (MVP) are also considered, as Service Design is influenced by them. Lean development in client portal concept creation is used in creating a minimum viable product. This way the client in the centre of the service is reached as fast as possible, and feedback of the idea can be used to develop the concept further. This is a fast way to keep up with the pace of the increasing digitalisation.

This framework is the theoretical background for the empirical framework. The next chapter starts by discussing the research approach behind the study. The discussion continues with methods and tools used in the empirical part.

# 3 Research approach and methods

This chapter discusses the qualitative and abductive nature of this case study. Qualitative approach relies on multiple theoretical perspectives which fit to the various theoretical background of this study, and finds answers to questions starting with “why”, “how” and “what” (Eriksson & Kovalainen 2016, 32, 42). Silverman (2011, 17) points out, how qualitative data occurs naturally and is not formed by the researcher, compared to e.g. surveys. As this study is interested in the client’s ecosystem and value-in-use (Heinonen and Strandvik 2015), qualitative approach was needed in understanding client’s thoughts and actions and the reasons behind them.

## 3.1 Research approach in the empirical part

The research approach in this study is abductive. According to Eriksson and Kovalainen (2016, 24), the idea of abduction is to dig into real life, shape that insight into categories, and by doing this, to create an understanding of a phenomenon. They add that (2016, 23-24) abductive research combines elements from both deductive and inductive approach. Deductive approach is theory driven and tests hypotheses based on theories, whereas inductive research is empirical goal driven and builds theories based on results.

Including the abductive nature, following Ojasalo, Moilanen and Ritalahti’s (2014, 36-38) view, this study is a service design case study, which combines elements from action research and constructive research. According to the definition above by Ojasalo et al., it can be partly considered as an action research, as it makes the staff actively participate in the process by being interviewed or participated in workshops; but it does not implement the solution, which is a prerequisite of action research. It is also partly a constructive research, as it tries to build a solution, the concept. It can be therefore named as a case study, as it focuses on creating a solution, a concept, by using several methods and data sources.

In this study, the goal is to find answers to how customer-centricity can be used in building a digital business-to-business client relationship tool. The empirical case study aims to create a concept for the client portal, by solving what should be taken into account when building the portal, including what challenges exist and who are its users and stakeholders, what should the portal be like, and what kind of needs the clients have. Following the Customer-dominant logic and the model (page 34) created by Heinonen and Strandvik (2015), abductive case study approach was used in this study in discovering daily tasks, actions and goals, as well as understanding the interaction between the client and the company. The goal was to understand what happens in the customer's life that could be eased by the portal—to know the client's problem. Also, the methods and tools were chosen to fit the customer-centric approach. These will be discussed in the next chapter.

## 3.2 Methods and tools used in the empirical part

Customer-centricity is one of the core elements in service design and the core of this study, therefore the empirical part was focused on stepping in the customer's world. But how to do this? Which methods and tools support Customer-dominant logic? What is needed when trying to understand the client? According to IDEO (2015, 22) the answer is empathy, as it helps us to dive into customer's lives, to understand them and to see through their eyes and actions. This is necessary when trying to solve their problems, and is called human-centered design. The service development plan should be also built on client's real needs. Methods and tools were chosen to this study based on their capability to add empathy to the design. Methods and tools used in this study are interviews, personas, mind maps, stakeholder maps, jobs-to-be-done, customer experience business value matrix, and service blueprints. During the workshops MeWeUs and Learning Café were used as facilitation tools. In this chapter tools and methods are described in detail. The methods used in this study are presented in Table 3 (see next page).

| METHODS USED IN THIS STUDY | | | |
|---|---|---|---|
| **METHOD** | **APPROACH** | **PHASE** | **RESEARCH QUESTIONS** |
| **Empathy map** | Map insight from interviews & workshop to a customer-centric format | Discover | - What should be taken into account when building the portal? Challenges? Users and stakeholders?<br>- What should the portal be like?<br>- What needs do the clients and the company have?<br>- What are the benefits of the possible portal? |
| **Interviews** | Data source for the study | Discover | - How is customer-centrism defined?<br>- What should be taken into account when building the portal? Challenges? Users and stakeholders?<br>- What should the portal be like?<br>- What needs the clients and the company have?<br>- What are the benefits of the possible portal? |
| **Mind map** | Understand clients' and company's ecosystem | Discover | - What should be taken into account when building the portal? Challenges? Users and stakeholders?<br>- What needs do the clients and the company have? (systemwise)<br>- What should the portal be like?<br>- What are the benefits of the possible portal? |
| **Stakeholder map** | Understand clients' and company's ecosystem | Discover | The same as above |
| **Benchmarking interviews** | Benchmark experts | Discover | - How is customer-centricity defined?<br>- Best practises when building a customer-centric digital tool?<br>- What should be taken into account when building the portal? Challenges? Users and stakeholders?<br>- What are the benefits of the possible portal? |
| **Internet search** | Benchmark other solutions | Discover | - Best practises when building a customer-centric digital tool?<br>- What should be taken into account when building the portal? Challenges? Users and stakeholders? |
| **World Café** | Facilitation tool in a co-creative workshop | Discover | - How do collaborative service design methods and tools fit into a traditional business context? |
| **MeWeUs** | Facilitation tool in a co-creative workshop | Discover / Define | - How do collaborative service design methods and tools fit into a traditional business context? |
| **Personas** | Visualize the insight from client interviews | Discover | |
| **Jobs-to-be-done canvas** | Understand the underlying motives clients have | Define | - What are the benefits of the possible portal? |
| **Customer experience & business value matrix** | Prioritize features for the minimum viable product | Define | |
| **Data flow & Expressive service blueprint** | Connecting MVP features and current systems | Develop | - In which ways can a portal tool be prototyped?<br>- What should be taken into account when building the portal? Challenges? Users and stakeholders?<br>- What should the portal be like?<br>- What needs do the clients and the company have? (systemwise) |

Table 3: Methods used in this study

**Discover phase: Empathy map with pains and gains**

Osterwalder, Pigneur and Clark (2010, 130-131) present tools that are valuable for client relationships and based on empathy and customer-centricity. Empathy map, originally developed by a company called XPLANE, is based on the idea that client's challenges and gains can be discovered by a tool called "pains and gains". Osterwalder, Pigneur, Bernarda and Smith (2014, 60-61, 88) use "pains and gains" as a one part of their Value Proposition Canvas (Figure 13) tool when specifying the client's unresolved pains and unrealised gains. **Pains** are undesired outcomes, barriers and risks, that annoy the client when they try to get their job done. Some have a bigger impact, some more moderate. Osterwalder et al. categorises undesired pains into problems that are functional, emotional, or annoying, ancillary. **Gains**, on the other hand are, according to Osterwalder et al.: required gains, which are needed to achieve a goal; expected gains, which the client wishes to receive; and desired gains, which the client would love to have. Osterwalder et al. also uncover **actions**, which customers are currently doing when using the service. Actions can be considered as customer's jobs relating to the services. The idea is to shape an existing service or develop a new service by understanding the customer's gain creators and relieving their obstacles and minimizing challenges. (Osterwalder et al. 2014, 14-17, 20-25, 60-61, 88.)

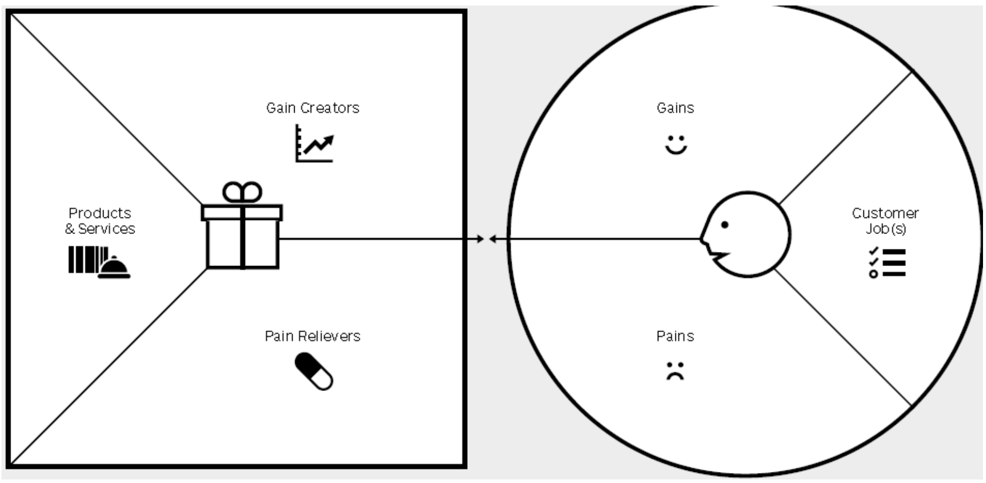



Figure 13: Value Proposition Canvas (Osterwalder et al. 2014, 8-9).

An empathy map (Figure 14) is a helpful tool for discovering needs, finding out core problems users face (Tschimmel 2012), as well as mapping and improving customer experience (Curedale 2016, 217). Therefore, it fits to the Customer-dominant logic approach, which aims to understand how the company's offering connects to the customer's life and tasks in it. Empathy map is a visual way to gather insight from personas, interviews (Tschimmel 2012) and from customer groups (Curedale 2016, 217). Service departments and web analytics also serve as sources when mapping the client's view, as Curedale (2016, 219) points out.

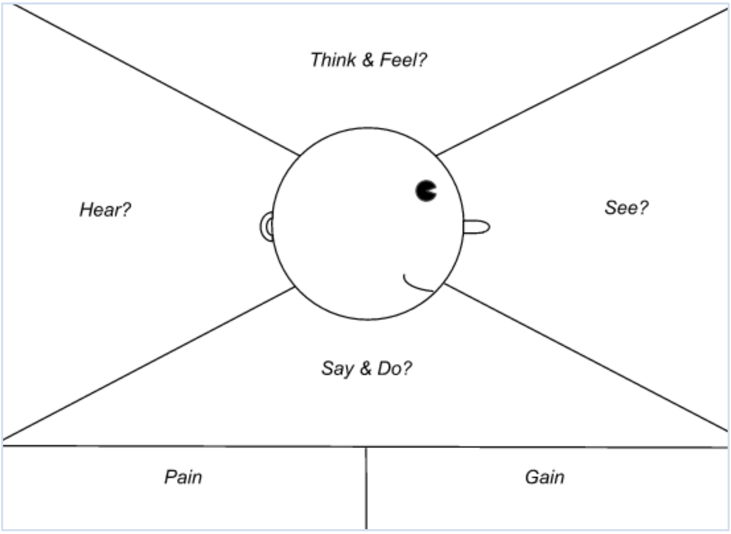



Figure 14: Empathy map (Osterwalder et al. 2010, 130).

Empathy map is criticised for its simplicity, as for example customer journey maps, one of the most important service design tools, gives a deeper insight into the complex services systems (Rosenbaum, Otalora & Ramirez 2017). Nevertheless, Rosenbaum et al. (2017) agree that a customer journey map, with its several service layers, might be even too complex to some situations, and Curedale (2016, 214-217) points out that empathy map is a tool for getting a good overview of the client's experience. He adds that using the empathy map creates empathy towards the customer, and helps to build a service from the customer's point of view. It can be used to uncover the user's real reasons for certain actions and decisions. As mentioned above, interviews can be a source for creating an empathy map. The next chapter discusses different aspects concerning interviews. Empathy map is used during the whole discover phase described in Chapter 4.2.

**Discover phase: Interviews**

One of the main data collection methods in this research was interviewing. There are several interview methods. Ojasalo et al. (2014, 41) as well as Silverman (2011, 160-162) split them into structured interviews, semi-structured theme interviews and open interviews. In-depth interviews (Pigues & Alderman 2010, 57) and free-style interviews (open interviews) are examples of exploratory interviews. Osterwalder et al. (2014, 25) suggests asking "why" several times to understand the motivations that really affect clients. Standardised interviews are conducted by using a survey during the interview. In case the interview is done in the service environment, it is a contextual interview (Schneider & Stickdorn 2010, 156). An interview can be both standardised and contextual or in-depth and contextual.

As the interviewee usually has some questions and topics pre-planned to help remembering the most important aspects, Pigues and Alderman (2010, 158-161) point out that an interview guide should be built around the main hypotheses, otherwise the interview is just a normal conversation. They add (2010, 202) that one important part of the interviews is how well the data is captured, analysed and reported. According to Schneider and Stickdorn (2010, 156-158), interviews can also be filmed or photographed, and tangible prompts (so-called mock-ups, e.g., photos, flyers, Legos etc.) can be used. Pigues and Alderman (2010, 202) underline that documenting the interview should be done as soon as possible after the interview, as the potential outcome of the interview shrinks by time.

In this study, the in-depth exploratory interview method seemed most appropriate, as it gives the freedom to follow interviewee's emotions and stories within the interview. A guide was used to support the interviewer in remembering the themes, but it was not directing the interview. The interviews can be described as semi-structured exploratory in-depth theme interviews, as an interview guide was used (Ojasalo et al. 2014, 41; Silverman 2011, 162). During the interviews mind maps were created and a mock-up used (Appendix 5). All interviews were audio recorded and transcribed by the researcher. The internal interviews are described in Chapter 4.2.2 and client interviews in Chapter 4.2.4.

**Discover phase: Mind map**

To be able to understand the connections between a new service or an idea, one must understand connections behind the service (Curedale 2013, 56-57). **Mind map** is a method for visualizing these connections, Liedtka and Ogilvie (2014, 81) call it the "window into reality", and Mahmud et al. "capturing ideas on a horizontal surface". Tuulaniemi (2011, 140-141) points out how mind maps can reveal insight into hierarchies and cause relationships. It is an easy tool with a strong impact on brainstorming and innovating ideas. A study conducted on students by Mahmud et al. (2011) proved that there is a 95 percent greater chance of creating new ideas when using a mind map compared to not using mind map at all. Therefore, this seemed to be an effective and easy ideating tool for interviews.

In a mind map the key word is written in the middle of the area, from which lines and arrows are drawn to other words associated with the main key word. Originally mind map was invented in 1960 by Allan Collins (Curedale 2013, 56-57), and further developed by Tony Buzan in 1970 (Mahmud et al. 2011). It can be used for various needs, such as learning, memorizing, summarizing, understanding relationships, and understanding the context from the point of view of the customer. There are no right or wrong answers, and all symbols, drawings, colours etc. can be used. (Curedale 2013, 56-57; Mahmud et al. 2011, Tuulaniemi 2011, 140.) The creation of mind maps is described in Chapters 4.2.2 and 4.2.4 as well as in Appendices 7-9. In this study, to support the findings of mind maps, a stakeholder map was created during a workshop, which is described in Chapter 4.2.3.

**Discover phase: Stakeholder map**

Stakeholder map is also used to understand the business-to-business context, in which various stakeholders influence the organisation. Stakeholders can be internal and external using different systems, platforms, communication channels connected to various units and departments. (Schneider & Stickdorn 2010, 143-145; Smaply 2016, 14-17.) In this study the stakeholder map was used, as it seemed to be an appropriate tool to describe the client's ecosystem and life defined by Heinonen and Strandvik (2015) in their Customer-dominant logic approach.

Mitchell invented the stakeholder map in 1997 (Curedale 2013, 235). The Figure 15 below describes the stakeholder map template used in this study. Following Mitchell's ideas, there is an inner circle with the persona or the service in the middle (core), which is linked directly (direct) to the main stakeholders, objects, channels, and places in different stages of the customer journey. These stakeholders can be linked to each other, and grouped according to their importance and influence. The outer circle (indirect) consists of stakeholders not directly connected to the persona. (Schneider & Stickdorn 2010, 143-145; Smaply 2016, 14-17.)

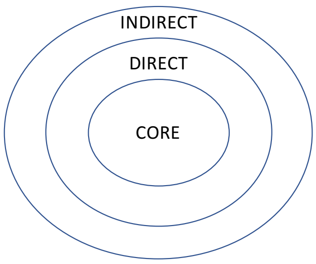



Figure 15: Example of a stakeholder map

Osterwalder et al. (2014, 50-51) group stakeholders into influencers, decision makers, recommenders, end users, economic buyers, and saboteurs, whereas Curedale (2013, 235) categorizes them into those who need it, those who have power, those who influence, and those, who support the service design. Osterwalder et al. (2014, 50-51) describe, how decision makers listen to the influencers, whereas recommenders evaluate and are with or against the decision. Economic buyers are the ones responsible of the budget and the money used. Decision makers are the ones making the final decision.

Practically the stakeholder map can be made of paper and sticky notes or it can be made on a computer program. Post-its give the possibility to reorganize the map. (Schneider & Stickdorn 2010, 150-153.)

Stakeholders are other companies and competitors as well. Therefore, it is necessary to understand what kind of solutions they have created. They might have an impact on client's life.

**Discover phase: Benchmarking interviews and internet search**
Benchmarking in the beginning of the service design process can help to understand how the service is used elsewhere and in other organisations (Ojasalo et al. 2014, 186). This learning phase can save money and reduce risks by learning from other's best practises and mistakes. Benchmarking can be done in several ways. Sometimes it is possible to get the data directly from the company itself by interviewing experts, e.g., in other business fields, as Ojasalo et al. advice. Yet, as Tuulaniemi (2011, 139) points out, direct competitors are unlikely willing to openly share their views. He adds (2011, 138-139) that in these cases, researching other companies can be done, e.g., by observation, netnography, mystery shopping and reading company website.

In this study benchmarking was done in two ways: a short benchmarking study was done by browsing by search engines, such as Google, competitors' websites, related literature, and possible portal solutions. In this study benchmarking was also done by interviewing three experts in different companies (non-competitors). Benchmarking interviews and the competitor analyses are both described in Chapter 4.2.1.

**Discover: Facilitation tool, World Café**
According to Nummi (2007, 32-88), facilitation methods and tools are related to the complexity level of the decision-making and the nature of the situation. They promote team culture, common ideation and decision making, which was needed during this concept project. The World Café method offers participants the opportunity to give their opinion on every topic—a group decision and ideation method originally developed by Juanita Brown and David Isaacs in 1990's (Schieffer, Gyllenpalm & Isaacs 2014). The World Café method is flexible, as it can be used for smaller and larger groups.

The World Café themes should be clear and well presented to the participants before the café starts. One person from every group is chosen to be the "Table host", who stays in the same table the whole time. The rest of the group rotates from table to table (see Figure 16 below) until the groups have gone through all the themes. When participants move, they bring ideas from the previous tables. Every table can have, e.g., a big sheet of paper, which is used for taking notes. The signal to change tables is notified by the facilitator. Common ideas are grouped together, and the World Café ends to joint discussion over all the topics without any order, or the Table Host presents the ideas to others. The optimal number of participants per group is four, but it can be even up to 1200 people. (Brown & Isaacs 2005, 167-172; Schieffer et al. 2014.)

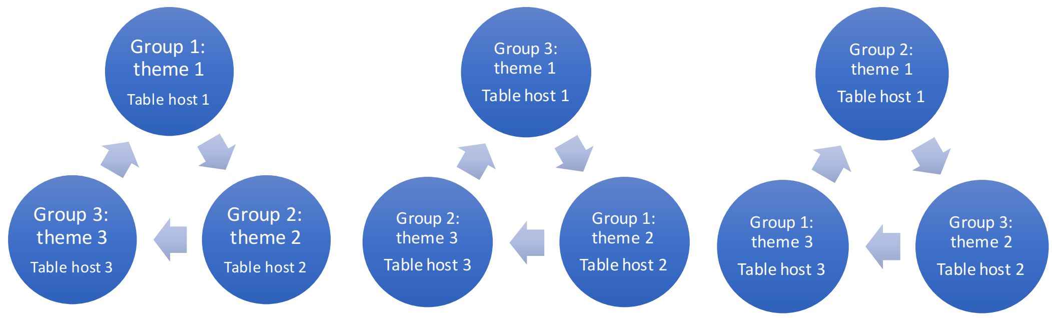



Figure 16: Idea of groups moving from theme to theme in the World Café

This tool was chosen to the workshop (Chapter 4.2.3), as it can break boundaries and build a company community feeling. The main idea of the method is to share knowledge by networking and creating a kind of a common understanding, collective wisdom. Insight and ideas are shared, combined, and reorganized as the groups change themes and go around all the themes (Brown & Isaacs 2005, 4, 163-169). According to Schieffer (et al. 2014), the World Café method is a suitable method for, for example, ideating key strategic challenges and possibilities the company is facing in the future. The World Café enables everyone, even the ones who might normally stay passive, to share their opinion (Brown & Isaacs 2005, 168).

**Discover & Define: Facilitation tool, MeWeUs**

Another method was used in the first two workshops, the MeWeUs. It is a divergence-convergence facilitation method, which activates everyone in the discussion (Nummi 2012, 35). In the beginning every participant ideates the theme individually on sticky notes. This is followed by discussing these ideas in pairs or shared in the group, the “We” part, while simultaneously grouping them. The last part is sharing ideas to other participants, the “Us” part. Instead of only using the World Cafe, the MeWeUs ensures complete participation and involves individual thinking combined with ideation in pairs and groups. Everyone gets to describe their ideas, and ideas become owned by everyone. The tool eases generating of new ideas, co-exploring a topic and sharing experiences and ideating overall. It makes people understand other people's ideas and is good for enhancing empathic understanding. MeWeUs was used in the first workshop (Chapter 4.2.3) and the second workshop (Chapter 4.3). Empathy is also the focus of the next tool to be described, the personas.

**Personas**

Personas present a typical person with defined characters from a group of shared interests, company’s target groups. Personas are not stereotypes but rather archetypes, which can be developed further with visual artefacts. These personas are commonly made together in a service design group. Creating a persona commits group members to the process. According to Segelström (2012, 203-204), personas can reveal patterns and articulate insights, communicate those insights, and maintain empathy with the target group. Persona cards, with image and text, can be used to create consensus in the design process. Personas can include age, name, picture, hobbies, occupation, home, family etc. Research insight and feedback, knowledge of real customer needs and wishes, make the personas close to real people, authentic, and this way a persona can reflect how the real world sees the service and uses it. (Schneider & Stickdorn 2010, 178-179, 184, 244-245; Davies & Wilson n.d.,16.)

Schneider and Stickdorn presented (2010, 136-143) the AT-ONE service design process approach, in which personas is used as a tool in the "Need" phase for gathering customer insight. According to Schneider and Stickdorn personas can be used as a part of other methods, such as "a Day in the Life" (2010, 174-175), Design Scenarios (2010,184-185), Service Staging (2010, 194-195) or Service Roleplay (2010, 208-209). "A Day in the Life" describes one day in the persona's or project participant's life. This typical day can be presented in many forms, sketches, photos or videos, and it describes what the persona thinks and does. In this study personas were used in the "Need" phase as Schneider and Stickdorn suggest. Personas are described in Chapter 5 as a study finding. The next tool, jobs-to-be-done, was used in the define phase.

**Define: Jobs-to-be-done (JTBD)**

In this study, the define phase focused on creating a minimum viable product. Therefore, it was relevant to use a tool, which could help in understanding how the customer might think and evaluating his or her decisions. Christensen, Hall, Dillon and Duncan (2016) point out how companies should forget their typical sales speech, and concentrate on the value being delivered, which in this study is how the client experiences the value-in-use following Customer-dominant logic.

Christensen et al. (2016) emphasize that when clients need to do a job related to services, emotions are usually involved. This is the basic idea in the Jobs-to-be-done theory, named under Christensen et al. (2016; Leavy 2017). Yet, literature (e.g. Kern & Culley 2016; Leavy 2017) seems to neglect the contribution of Ulwick (2002; 2005, 19-38; Bettencourt & Ulwick 2008) to the theory, as Ulwick was the one to introduce the original idea to Christensen (Ulwick 2017, 4). According to Ulwick (2017), jobs-to-be-done is a part of the Outcome-Driven Innovation (ODI) strategy and innovation process established in 1991. In this study, we use a qualitative jobs-to-be-done template (Figure 17, Appendix 20) created by Ulwick (2017, 8) in the define phase workshop (see Chapter 4.3).

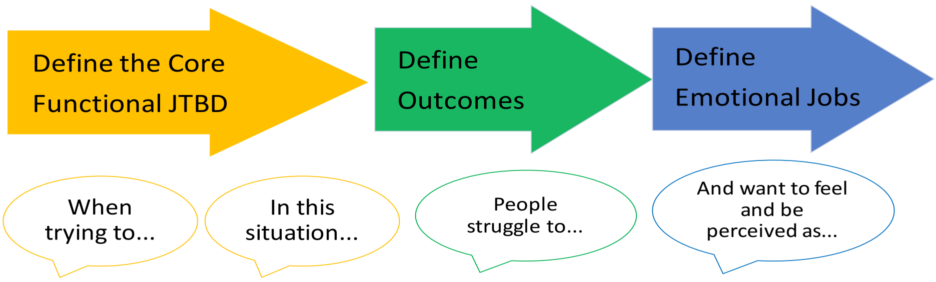



Figure 17: Jobs-to-be-done template (Ulwick 2017, 8)

Ulwick (2017, 8) points out that this template is a valuable tool for understanding the various client's needs, as it puts them into a story format and statements. It makes needs more concrete and easier to interpret.

**Define: Customer experience business value matrix**

As the jobs-to-be-done tool gives a basis for understanding how the client evaluates different features in the service, the customer experience business value matrix goes even further and combines evaluations into a matrix with the customer's experience and company's business case (see Figure 18). There were multiple features and functionalities ideated for the portal, and it was important to map them according to what they bring to the company and to the client. (Tuulaniemi 2011, 106.)

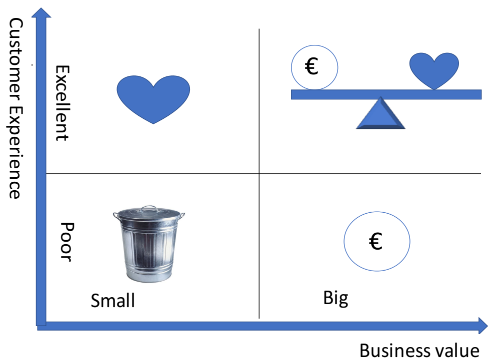



Figure 18: Matrix for evaluating new service ideas (Tuulaniemi 2011, 106)

The matrix above is created by Palmu Inc. (Tuulaniemi 2011, 106), and its idea is to connect and balance the impact of customer experience and business value. Matrix can be used to give points for every idea's feasibility and impact, and then place them on the canvas. The experience is on the y-axis and the business value on the x-axis. The main idea is to see, which of the suggestions are really the ones valued by the customer and bring a business value to the company. This matrix was used in the second workshop described in Chapter 4.3. To understand how the ideas received from clients and staff can be developed further into a real system, a data flow needed to be created.

**Develop: Data flow/model**

To be able to understand what kind of systems are needed, and to get a coherent view of the requirements to the final portal, an initial data model picturing the data flow was created. Data flow describes connections and limitations. It includes all the attributes (features) and association lines (Alexander, Beus-Dukic & Jackson 2009, 203).

According to Leffingwell and Widrig (2000, 147-152, 465-477), a data flow can be used to prototype the system requirements and to act as an initial idea of the software system. It reveals lacking functionalities and systems as well as supplementary needs, and should include requirements and features. In this study, it was used in the ICT workshop (Chapter 4.4) as a base for discussion, to be further developed into expressive service blueprints, which will be discussed next.

**Deliver: Service blueprinting**

Service blueprinting was originally developed by G. Lynn Shostack for service related cost and revenue planning (Polaine et al. 2013, 91). Meroni and Sangiorgi (2011, 239) suggest using service blueprinting in the developing phase of the service design process, whereas in this study it was used as a prototype in the deliver phase.

Spraragen and Hickey (2011, 115-117) emphasize the importance of an empathetic approach to the service blueprinting, and they use “bubbles” of quotas, which demonstrate behavioural emotions. This emphatic approach is called the expressive service blueprint (Meroni & Sangiorgi 2011, 256). According to Meroni and Sangiorgi, it visualizes the emphatically meaningful moments from the customer’s perspective, and is especially useful when the service includes a lot of interaction between the customer and its provider. Meroni and Sangiorgi (2011, 255) also suggest adding incidental points of failures to the blueprint for further development.

According to Davies and Wilson (n.d.), service blueprints describe only the future service and not the existing service, whereas Meroni and Sangiorgi (2011, 255) as well as Polaine et al. (2013, 96) suggest using service blueprints to improve existing services, and to develop new ones. In this study, it was used to prototype the client portal and to express the benefits and challenges in the blueprint touchpoints. Polaine et al. (2013, 97) add that it is also a useful tool for innovating new services, and according to Heinonen et al. (2010), it can help companies in defining their processes based on customer insight.

Without comments, graphics or other emotion expression, the tool is built as a normal service blueprint. According to Davies and Wilson (n.d., 19) and Schneider and Stickdorn (2010, 204-205), service blueprints visualize all the aspects of the service: the ones that are visible to a customer, and the ones happening behind the scene (Figure 19). According to them, service blueprints describe the customer journey, touchpoints, channels, support actions and even emotions used in the service. They state, together with Meroni and Sangiorgi (2011, 255), that service blueprints are used to communicate and give a holistic view of the service, its crucial touchpoints, and parties involved in the service. According to Schneider and Stickdorn, service blueprints reveal inefficiency, such as overlapping activities. As to Spraragen and Hickey (2011, 117), they show which actions are not matching the company standards. Davies and Wilson add that service blueprints reveal which parts of the service can be prototyped. Blueprints can be very detailed describing only one part of a service, for example, a performance of an encounter, or they can depict the big picture of the whole service process (Meroni & Sangiorgi 2011, 255; Schneider & Stickdorn 2010, 204-205). In this study, service blueprints describe the user journey versus the features and content chosen to the minimum viable product.

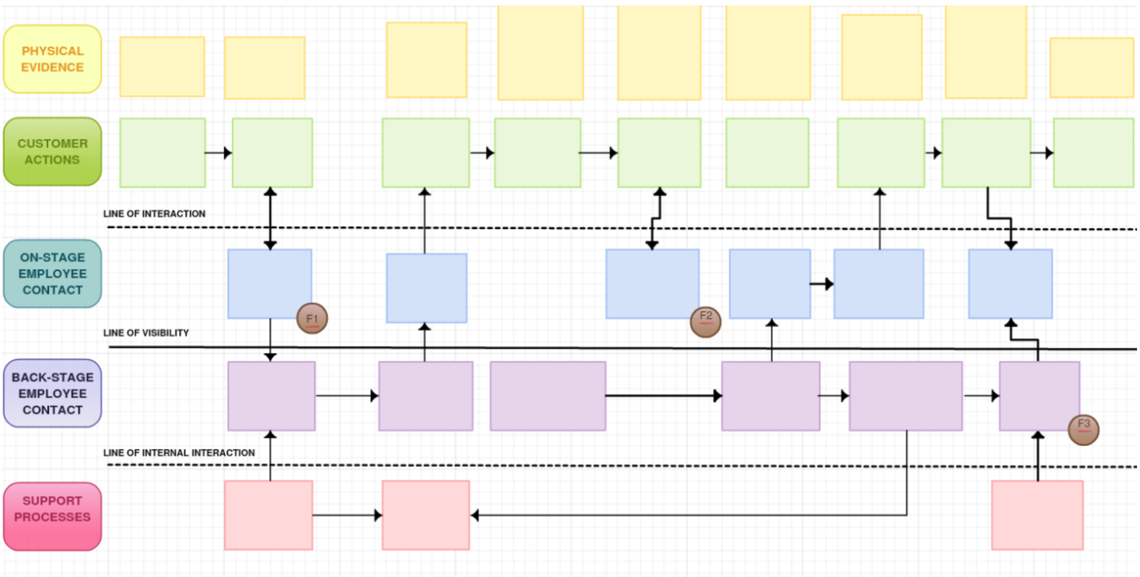



Figure 19: Example of a service blueprint template (Creately 2017)

On the top row of the blueprint (see Figure 19) are the physical evidences, and directly under them are user's actions related to the physical evidences. According to Polaine et al. (2013, 98), these actions are moments when users become aware of the service, when they join or register into the service, when they use the service, and when they leave the service and stop using it. After these user actions, there is a line of interaction and onstage activities with the service front stage, which are the touchpoints of the service. These parts of the service are visible to the customer; therefore, they are separated by a line of visibility under which are the backstage activities and contact actions. The lowest parts of the blueprint are the internal interactions and support processes which describe the actions inside the organisation. (Spraragen & Hickey 2011, 113-114; Schneider & Stickdorn 2010, 206-207.) Sometimes service designers add an additional line of where and how value is created (Kimbell 2011, 109). Service blueprint offers a dimensional perspective into services. It has influenced service business theories, including the Customer-dominant logic. Heinonen and Strandvik (2015) took ideas from it when they developed the model of factors influencing the formation of customer value-in-use (Figure 11, page 34). The expressive service blueprint was used in the deliver phase (see Chapter 4.5 and Appendix 22).

All the eleven methods and tools were used in this study. Empathy map frames the whole discover phase and is used to present needs, challenges and benefits in a customer centric way. Interviews were used to find out clients' and staff's needs. Benchmarking interviews were done for hearing best practices in digital customer centric service design projects. Mind maps and stakeholder maps aimed in understanding connections between the client, the portal and the whole ecosystem. MeWeAs and World Café were used in workshop as facilitation tools. Jobs-to-be-done helped in revealing underlying motives and making the workshop participants think from the customer's perspective. The customer experience business value matrix was used in prioritising the features for the MVP. A data flow was created to match the wished features with the current systems and to see possible missing systems. Expressive blueprints were used to prototype the concept. The next chapter presents the empirical case study done for Fazer Food Services.

# 4 Empirical case study and findings

This chapter is dedicated to the empirical part of the thesis, and it describes the whole service design process of the case study made for Fazer Food Services. The main goal of this empirical part is to create a concept for the client portal. The development questions of this study are: what should be taken into account when building the portal (including challenges, stakeholders and users), what should the portal be like (ideas and feelings), what kind of needs do the clients have (functionalities and content) and what are the possible benefits of the portal. This concept is defined in the project to include the minimum viable product, explanation of client's needs and wishes, possible benefits of the concept to the company, an understanding of the stakeholders linked to the portal, personas of the main users, as well as an expressive service blueprint.

It is to be mentioned that before starting the concept development project, the management approved the study, as support from the managers' part is a key starting point to a successful service design process (Reason et al. 2016, 142). A short presentation of what is an extranet and how it could benefit the organisation was created (Appendix 1) and presented inside the organisation and updated in the intranet. The presentation was made to share the idea behind the concept, not ready solutions, but rather the idea of why the client portal would be valuable for the company. In the next chapter the empirical framework using the Double Diamond is presented. The research questions are also linked to the reason of choosing a specific method. The whole empirical part in Chapter 4 follows the Double Diamond process.

## 4.1 Double Diamond process—the empirical framework of the study

The Double Diamond process model was chosen, as it is a widely used, clear and understandable model for describing what service design process is all about. Compared to other service design processes, its phases depict best the process of this study, and it was visual and somewhat familiar inside the company, which made communicating the thesis idea easier inside the organisation. The process and methods used in this study and outcomes are listed in the Figure 20. The Double Diamond design process model aims to find innovative solutions, test them, and launch them as early as possible. According to Schneider and Stickdorn (2010, 126) and Seymour (2010), there can be even multiple diamonds but, in this study, the original double diamond fits the best. The Double Diamond process model (Figure 20) frames the service design process of the empirical part and moves from the left diamond to the right one in four phases. Chapter 4.2 is about discovering the main problem, Chapter 4.3 defining the minimum viable product, Chapter 4.4 developing it further and Chapter 4.5 delivering the MPV in service blueprints.

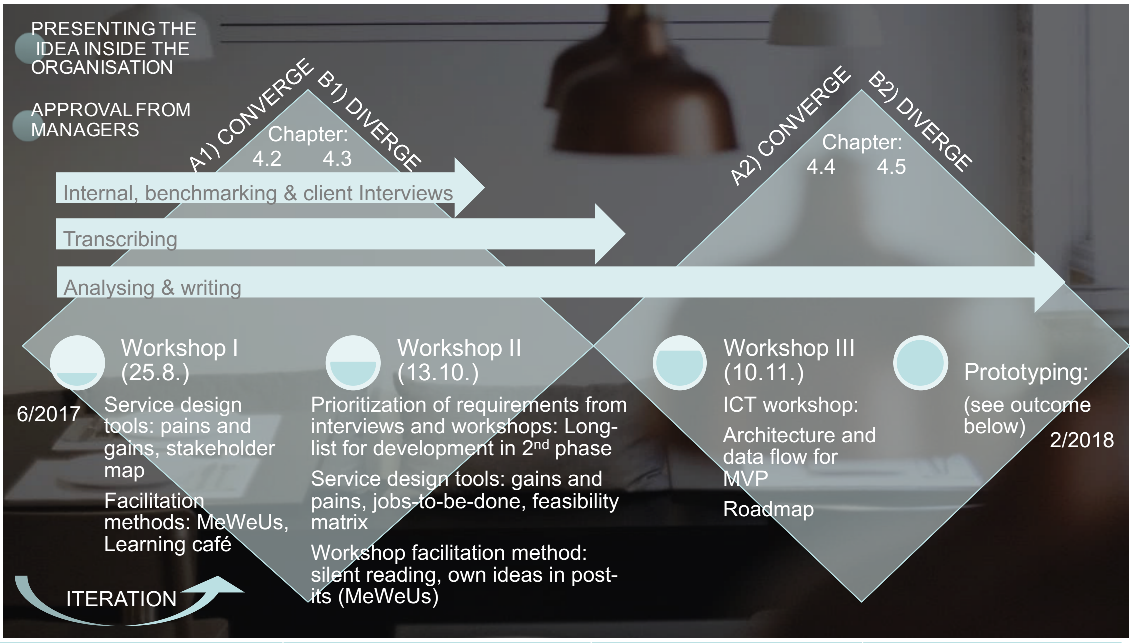
This study focuses on the qualitative approach and emphasizes the discover phase, which is considered one of the most important parts of the service design process (Schneider & Stickdorn 2010, 129). It explores the customer’s perspective and defines the real problem of what should actually be solved—what are the challenges the customers face. Osterwalder et al. (2010, 128) criticise, how companies rely too much on market research and forget to ask their client’s what they really desire. They point out the importance of building services from the customer-centric perspective: seeing through customers' eyes and getting a deep insight of them, their environment, daily routines, worries, and aspirations. This is also one of the main aspects in Customer-dominant logic of what companies should do (Heinonen et al. 2010): aim at gathering insight of what customers are doing with the service, and what they are trying to accomplish.

The process timetable is presented in the Figure 20. The interviews within the organisation, the internal client interviews, were conducted in the company during June-August 2017. The client interviews lasted until October 2017.

In this study the validity of research sources, methods and theories were taken into account as Yin (2014, 120) points out. Relying on three or more sources is called triangulation, which leaves fewer places to subjectivity and human errors (White 2009, 67-68; Yin 2014, 241). In this study, different type of data and several sources were used: interviewing at least three clients having the same contract type as well as having workshops and benchmarking.

The first diamond describes how the process starts converging (Figure 20, A1) multiple ideas and innovative thinking. The discover phase (which will be presented more deeply in Chapter 4.2) is searching the problem, exploring insights, motivations, customer needs and making an initial service design process plan. Discovery can be done by combining quantitative and qualitative research, such as market research, user research and trends analysis (Davies & Wilson n.d., 6; Kaner et al. 2014, 3-21; Schneider & Stickdorn 2010, 126; Seymour 2010). In this case study the discover phase consisted of qualitative tools, such as benchmarking interviews, competition analyse, client interviews, internal interviews, and an internal workshop. Benchmarking helped in finding out best practises for creating a digital tool, whereas interviews and the workshop helped figuring out challenges, needs and desired benefits, and the world which the client and the staff live in.

After the diverging phase, the converging phase of the process is followed by deliberately diverging (Figure 20) the ideas (B1), narrowing and focusing them (Davies & Wilson n.d., 6; Kaner et al. 2014, 3-21; Schneider & Stickdorn 2010, 126; Seymour 2010). Defining (to be discussed in Chapter 4.3), is framing the problem concerning the client and its service as well as narrowing and interpreting the results from the discover phase into opportunities (Davies & Wilson n.d., 6, 9). In this study, defining was to narrow ideas into a minimum viable product (MVP). This was done in an internal workshop inside the organisation. To be able to create a minimum viable product, the goal of the workshop, tools such as the jobs-to-be-done and customer experience business value matrix were used. Jobs-to-be-done is used, as it helps in understanding what the customer seeks in doing the things she or he does (Osterwalder et al. 2014, 25), and it helps in defining what really matters to the customer, and can be used as a basis for the minimum viable product criteria. The matrix is used to evaluate the customer experience versus business value (Tuulaniemi 2011, 106) per criteria defined in the jobs-to-be done phase.




| OUTCOME | OUTCOME | OUTCOME | OUTCOME |
|---|---|---|---|
| Stakeholder map | Initial idea of the MVP: | Initial data flow of the MVP | CONCEPT |
| Needs, pains, gains | Jobs-to-be-done | Roadmap | Expressive Service blueprints prototyping the customer journey |
| Personas | The customer experience business value matrix | | Specifications and suggestions for the future system |
| Mind maps | | | |
| Empathy map | | | |

Figure 20: Empirical framework of the service design process in the case study (Double Diamond adapted from Design Council UK 2005 presented by Davies and Wilson (n.d., 6)

The second diamond in the process starts by converging (A2) the ideas gathered and narrowed during the first diamond, into multiple ideas of how the service can be developed. According to Davies and Wilson (n.d., 6, 9), the developing phase (in Chapter 4.4) is creating solutions to the problem by testing, brainstorming etc. After the converging phase, the development ideas are diverged (B2) so that the service can be delivered. Davies and Wilson add that the delivery phase (Chapter 4.5) is the part of the process when the solution to the problem, a new service or an improvement, is launched. This phase includes final testing, approvals, communication and feedback evaluation. In this study, the second diamond included one workshop with ICT related staff. The goal of this phase was to understand what is needed systemwise to create the minimum viable product. An initial data flow was created. The last part of the process was the diverging phase, the deliver phase of the second diamond (Figure 20, B2). During this phase the data flow was refined into expressive service blueprints.

Chapters 4.2-4.5 follow the service design model Double Diamond process. To help the reader in following the logic of the process, every phase is depicted with a small Double Diamond figure before each chapter. We start from the discover phase.

## 4.2 Discovering challenges and needs

Following advice from Heinonen et al. (2010), the concept should not be based on what it can do, but rather on what clients want to achieve with it. In this study, the Empathy map is used to guide the discover phase as it frames all the aspects of the discover phase, which are also a part of the objectives:

- Map client's and organisation's needs, challenges and benefits of the portal based on the interviews and the internal workshop.
- Compare organisation's and client's perspectives in order to understand, whether needs, challenges and gains are same or not.
- Compare organisation's assumptions of client's needs, challenges and benefits to what the client is saying.
- Get the big picture of all the users and stakeholders related to the portal from all the phases.
- Create personas based on the client interviews.
- Understand best practises, pitfalls and benefits related to the process by learning from others and benchmarking.

The discover phase contained altogether six different data sources (see Table 3): three benchmarking interviews, competitors' solution search with the Google search engine and analysing company documents, 9 client interviews, 10 internal interviews, and one internal workshop. Table 4 below describes the method, number of participants, form of method, tools and coding used in all the different parts of the discover phase. These tools helped in gaining insight and understanding the challenges and needs of the clients and staff. The internal workshop and interviews represent together the company view. Internal interviews were used to gain insight from experts inside the house from various roles and departments. Interviews were also used to increase commitment and enthusiasm towards the new digital tool development inside the organisation, and to attract people to the workshops.

| Source | Amount | Form of method | Tools | Transcription Code |
|---|---|---|---|---|
| **Company data** | KPI tables, documents, tenders, contracts approx. 20 | Reading | Analysing | --- |
| **Benchmarking interviews** | 3 interviews | Semi-structured | | V, Y, Z |
| **Competition analyse** | 10 companies | Competitors' website check & internet search | Google search engine | Company A Company B |
| **Internal interviews inside the company** | 10 (including one pair interview) | Semi-structured | Mind maps Mock-up | A, B, C, D, E & F, G, H, I, J, K |
| **Internal workshop** | Attendants from staff | | Pains & Gains, Stakeholder map | W |
| **Client interviews** | 9 interviews | Semi-structured | Mind map | A1, B1, C1, D1, E1, F1, G2, H2, I2 |

Table 4: The empirical data sources of the discover phase

The structure of the discover phase is described in Figure 21. The phases were simultaneous. Empathy map defined what was sought and acted as a framework.

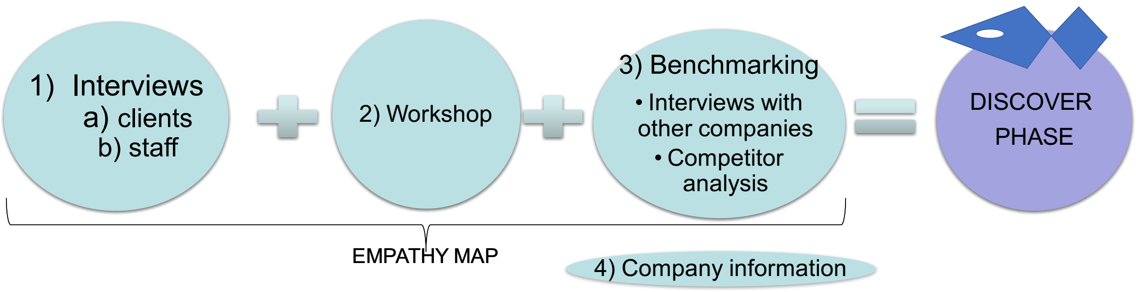



Figure 21: Steps in discovering needs

In this study, understanding the background of the case study and the company was done by reading information related to the governmental institution, which was the real client demanding the portal. This was seen important, as according to Stickdorn (2010, 128-129), a designer must know the company and its challenges, and to achieve this knowledge, the designer should try to get all the information possible about the company and the service in the beginning of the project. The company documents are company confidential and are not presented in this study. Those were contracts, KPI-tables, system specifications and other documents.

The discover phase is described as a process in the Figure 22. The questions described in the Empathy map were used to create the interview guides: one for the benchmarking expert interviews (Appendix 2), one for the internal interviews inside the organisation (Appendix 3) and one for client interviews (Appendix 4). The benchmarking interview had two “paths” as the interviewee, the write of this thesis, wanted to be sure to have a “plan b” in case the interviewee proofs to be more of an expert user of a portal than a creator of one. Two kinds of mock-ups were used. One was the mind map and the second a set of questions visible to the interviewee. It was used to inspire the interviewee and used in the expert interviews inside the organisation (see Appendix 5).

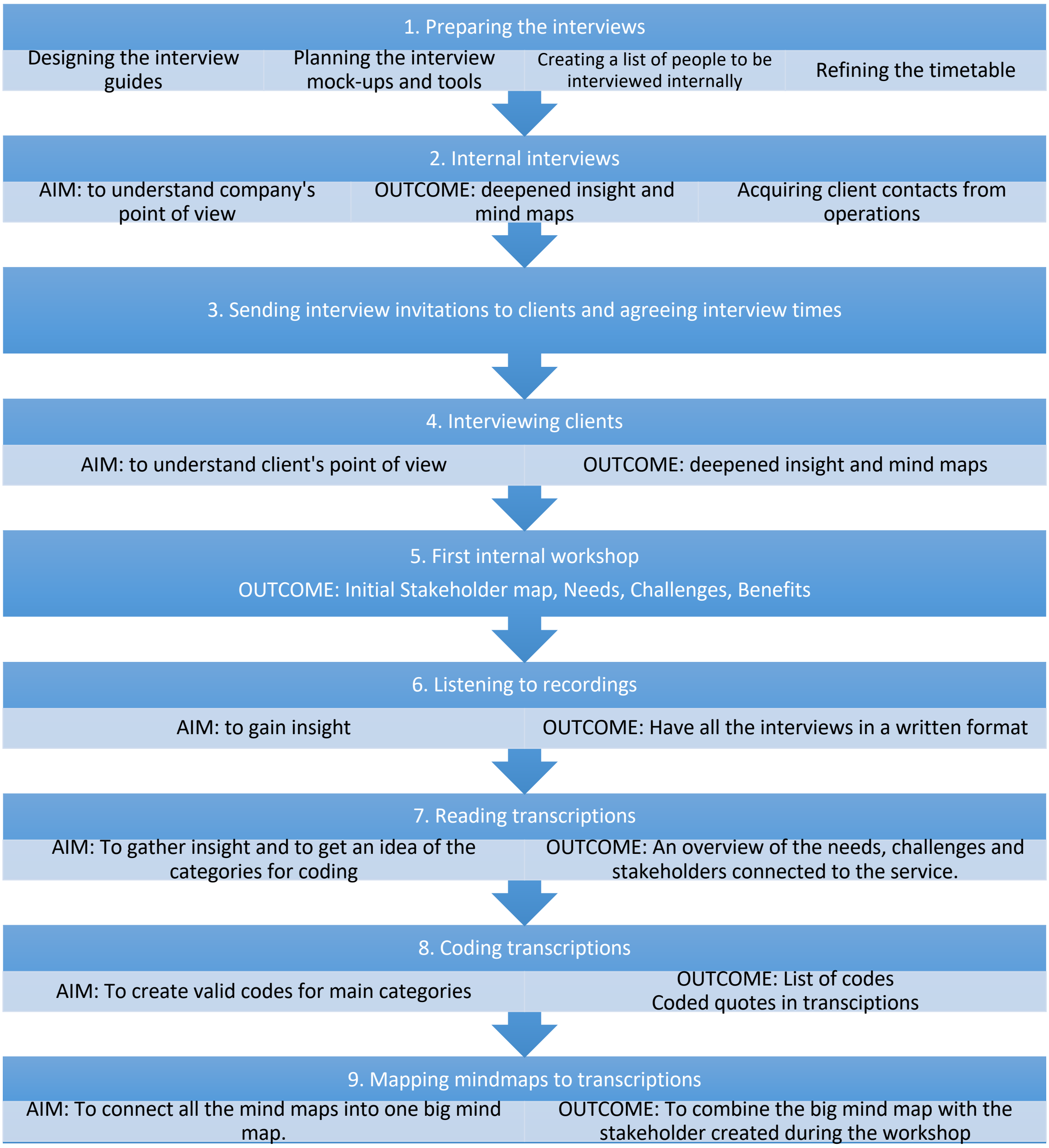


Figure 22: The discover phase as a process

An initial number of interviews was planned. The process started by deciding a set of people for the organisation’s internal interviews together with the project manager. The approach was iterative. In the end of every interview, the interviewee asked the interviewer suggestions for people inside the organisation, who should also be interviewed.

The interviews needed preparation. Invitations to clients and experts in other organisations (benchmarking interviews) were sent and locations agreed. The emails informed that the interview was a part of this MBA thesis work, and that everything would be kept anonymous. It was also asked whether it was appropriate to record the interview. The client and benchmark interviews took place in their own premises and were face-to-face interviews, except for the two Skype interviews. Before the internal client interviews, the interviewee booked the room with a white board. In this study, all the interviews were audio recorded by the interviewee's mobile phone with two exceptions done online and recorded through Skype for Business. Every interview started by introducing the interviewee and the study, thanking for the possibility to interview, as well as ensuring the interviewee's approval for the audio recording. The interviewees were also asked to tell about themselves and describe their role in the organisation. All the client and benchmark interviews ended by thanking the interviewee and handing out a small bag full of company products. Every interview and the first workshop result discussion part were transcribed by the thesis writer with the free transcription program called Express Scribe. Before transcribing, the recordings from the MP4 format had to be converted to a MP3 format. The transcription in total took approximately 120 hours, after which the texts were carefully read several times. After the reading phase the transcriptions were coded according to the advice given by Brinkmann and Kvale (2015, 215-248). Interview analysis focused on coding the meanings into themes. Brinkmann and Kvale (2015, 235) use the term "meaning condensation", which refers to finding the main categories and their connections.

The simplicity of the Empathy map (Figure 23) was the key in framing different elements affecting the client's service experience and more importantly, visualizing the customer in the centre and further on customer centricity. Ferreira, Silva, Oliveira and Conte (2015) modified the empathy map to consist of only "do", "think", "feel", "pains" and "gains" parts. This led to the idea of combining "see" and "hear" in this study, as both were used in framing the client stakeholders.

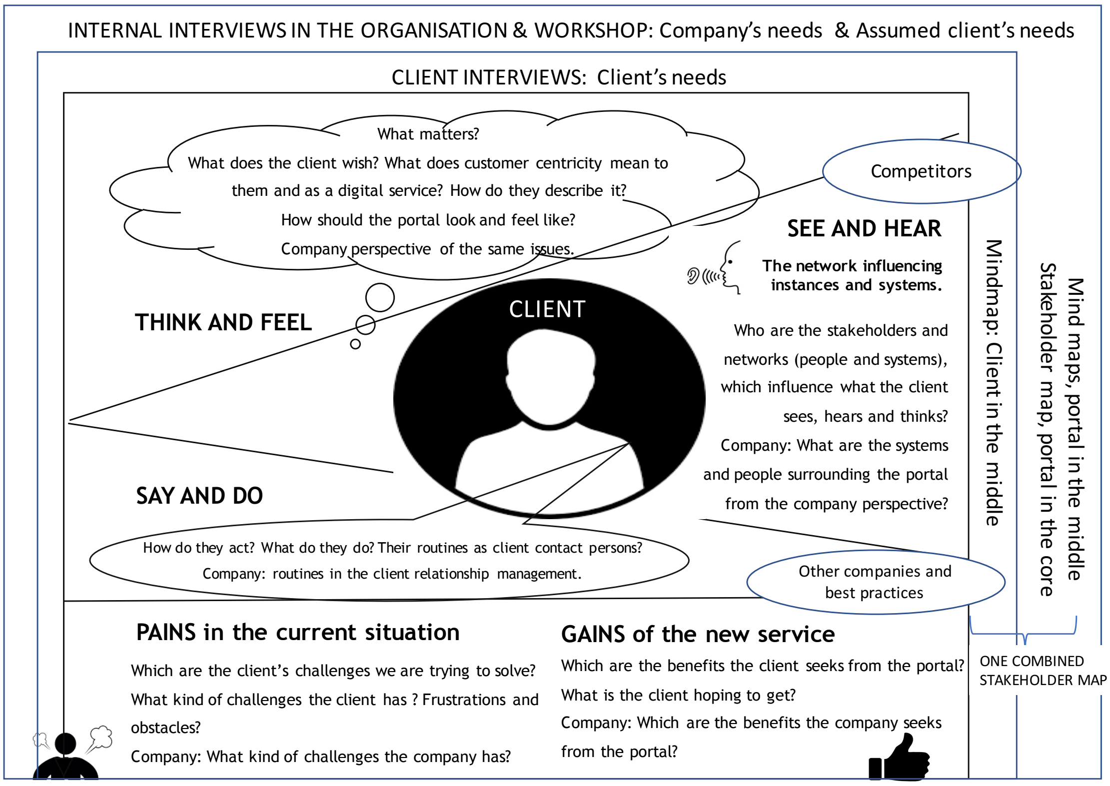



Figure 23: Empathy map in the client portal concept project

**Needs** were discovered by asking thoughts, feelings and doings during the client interviews, internal staff interviews and during the first organisation's internal workshop. "Thoughts and feelings" were assumed to be more abstract needs, "sayings and doings" more concrete needs. For example, empathy map's "saying and doing" was discovered by asking interviewees to describe their daily actions and routines, jobs as Osterwalder et al. (2014, 12-13) define them. For example, what steps do the clients take, when they are in contact with the company; which systems do they use when they deal with us; and do they import reports delivered by us to a certain system. Feelings were more related to questions such as: "How do you describe a well working client portal?" In addition, the staff defined their assumptions of client's needs. In this study, **pains** were asked as which challenges the person is currently facing, and **gains** as benefits which the person hopes to achieve by using the portal service. Client's pains and gains were discussed with the clients and in the organisation's internal interviews and workshop. The company's pains and gains were also discussed within the organisation. What the client and the staff members "**see and hear**" was discovered during the interviews by asking them to draw a mind map of their stakeholders such as people, institutions, and systems, which need to be related to the portal. Mind maps and the stakeholder map created during the first workshop were used to visualize connections (Liedtka and Ogilvie 2014, 81), and to understand which stakeholders should be considered when building the portal—the client's ecosystem, as Heinonen and Strandvik (2015) suggest. Clients were asked whom they report to and who affects their decisions. All the mind maps from all the interviews were later combined to a stakeholder map. In short, Empathy map (Figure 23) was used as a framework to categorise what customers and staff says, thinks and does, how they feel about the client portal, and to whom and to what they are connected to.

The discover phase (see Figure 20) contains several phases. The benchmarking interviews and competitor analysis were described in Chapter 4.2.1. The internal interviews are described in Chapter 4.2.2, internal workshop is described in Chapter 4.2.3 and the client interviews in Chapter 4.2.4.

### 4.2.1 Benchmarking best practises in other organisations

Other companies and competitors can give valuable insight in what should be taken into account when building a portal service. The early phases in the discover phase were **the benchmarking interviews**, which gave insight to best practises in customer-centric digital service design, and the competition analysis, which aimed to get an idea where the company stands compared to its competitors, and to know what kind of solutions they have created. The goal was to use insight from benchmarking interviews as advice of best practises for the following phases. **The competition analysis** was used to gather ideas on what the portal could be like, and if there were some valuable features that the company in this study could also use. This part of the study can be seen in the framework (Empathy map) on the right side of the Figure 23. These are added into the framework, as what clients see and hear is affected by the influence of competitors, as well as by other companies and the current norm of best practises. These influences might not be known by the client, but it is assumed, that they yet have an indirect influence into what clients might see and hear. E.g., the competitors are a part of the client's ecosystem (Heinonen and Strandvik 2015).

**Benchmarking interviews**

**The benchmarking interviews and competitor analysis** in the beginning of the discover phase were done for advice purposes following advice from Ojasalo et al. (2014, 43), who suggest benchmarking for gathering an understanding of all the possible existing solutions and best practises. The goal was to learn from others, to find out how these companies function in a customer centric manner, and what are their best practises, tools, and motivations behind their actions. Common pitfalls and challenges were also asked, as well as how they had experienced the portal development, its challenges, and benefits. The benchmarking interviews were done in the beginning of the discover phase (Figure 24).

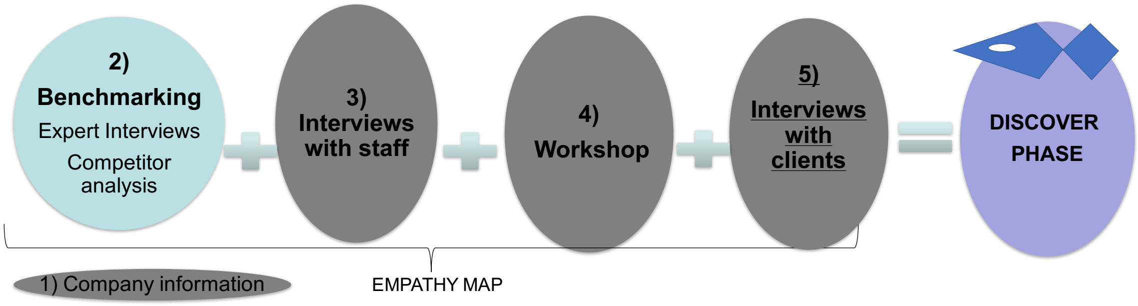



Figure 24: Benchmarking a part of the discover phase

An interview guide was prepared before the interviews, as according to Portigal (2013, 24-25), guides help in framing the interview questions and clarifies the rationale for the interviews. The interview guide (Appendix 3), based on the themes in Table 5 below, was partly based on an interview guide designed by Zomerdijk and Voss (2010). They used it for interviewing service providers, design agencies and consulting firm experts during an experience-centric service study. In this current study, new questions were added and the word “experience” was replaced by “customer”. The interview guide contained questions related to experience in customer-centric services and pitfalls in trying to be customer-centric. Also, experience in portal development processes were asked.

The benchmarking phase consisted of altogether three face-to-face interviews. All the interviews were recorded, transcribed and analysed by coding and categorising according to the advice given by Brinkmann and Kvale (2015, 215-248). The expert from company Z, represented expertise in service design in digital development (Table 5). Company Y was chosen, as they use service design and are developing a customer centric digital portal in the near future, and company V was known for having developed for their clients a customer friendly client portal. Interviewees Z and Y were more of development experts, and the person in company V was a portal user. The interview guide’s part 1 was used in the expert interviews and 2 in the user interview.

| Expert interviews | Interviewee profile | Experience of a client portal | Duration |
|---|---|---|---|
| **Z: A service design company** | Digital transformation manager with a consult background and experience in large digital projects. | The interviewee has created customer oriented digital services, e.g., portals. | 2 hours |
| **Y: A large service company from a different business field with various B2B customer segments** | Digital Manager leading a team focusing on digital client solutions. | The company is going to develop a client portal, but is still figuring out how. | 1,5 hour |
| **V: A large B2B service company from a different business field than the company** | Account manager using a client portal, which users have been very satisfied with. | This company has a client portal that has been in use for a couple of years. | 1,5 hour |

Table 5: Background of expert interviewees

Table 6 describes how experts defined best practises of a successful digital development project and portal creation, challenges and pitfalls, benefits, experience of a portal development project, features in a portal as well as opinions on customer-centric tools. Quotes are in Appendix 22. According to the interviews, the **key to a successful digital development** is to have a multi-skilled team with the right customer-centric mindset, led by a socially and technically skilled project manager. Other **digital customer-centric best practises** are co-creation with the customer, constant feedback evaluation and testing. Choosing the right methodology is also important. Related to the portal, the experts advised to create a service for the most valuable clients, not all. This service should be as standardised as possible and a modular minimum viable product building is recommended. The technical prerequisites, such as data accuracy and integrations, must be in place.

Common **challenge** is changing the old way of doing, not the IT process itself. Common **pitfalls** companies make, according to the interviewees, were thinking of knowing what the customer wants, not testing enough, being too slow, and not gathering feedback. They also mentioned how digitality is not the silver bullet to end all problems. One of the interviewees also pointed out the challenges of integrations in building a portal. Despite the challenge of sticking into old routines, service design projects had created inspiration and motivation in companies and acted as a source of new competitive ideas.

| BEST PRACTISES FOR A SUCCESSFUL DIGITAL DEVELOPMENT PROJECT IN GENERAL |
|---|
| - **Having the right mindset**<br>- **Choosing the right team**<br>- **Choosing the right project manager**<br>- **Involving customers and asking for feedback, co-creation**<br>- **Testing, testing and again testing with the customer**<br>- **Choosing the right methodology** |
| **BEST PRACTISES FOR PORTAL CREATION:**<br>- The 80/20 rule<br>- Technical prerequisites must be in place<br>- The minimum viable product<br>- Standardize your services |
| CHALLENGES & PITFALLS |
| - Changing people's behaviours<br>- Create a strong vision, test it and look how it evolves<br>- Solving wrong problems or solving problems with digital solutions<br>- You can't call it customer-centric if you don't receive the feedback<br>**CHALLENGES IN BUILDING A PORTAL:**<br>- Technical limitations, especially integrations |
| BENEFITS OF THE SERVICE DESIGN PROJECT & PORTAL |
| - People collaborate and find new inspiration and motivation to their work<br>- Competitive edge |
| **BENEFITS OF A CLIENT PORTAL**<br>- Ability to measure and financial interests<br>- The portal engages clients |
| EXPERIENCE OF THE PORTAL DEVELOPMENT PROJECT |
| - Customers were very interested<br>- Training and testing was needed<br>- Right attitude and courage<br>- Personal face-to-face contact is still the number one |
| FEATURES IN PORTAL |
| - Reports, real-time, annual cycle, specified user rights, development plan, events, client data, requirement analysis, invoices, reminders, recorded and real-time webinars, news, a commenting field, chat |
| CUSTOMER-CENTRIC TOOLS FOR DIGITAL TOOL CREATION |
| - Client interviews, observations, ethnography, opportunity road mapping, mock-ups and artefacts and lean canvas<br>- Lean canvas, pains & gains |

Table 6: Customer-centric digital development according to the benchmark interviews

The account manager, whose company already had a portal, valued it very highly and described the benefits. It is the **core digital service** in her company. This is similar to the company A's view in the previous chapter, of how the portal has a strategic role in their client relationship management. The account manager being interviewed said it has engaged clients, and none of her clients have left since the portal has been in use. She pointed out the importance of adequate training, testing and face-to-face meetings. The clients thought the project was interesting, as they felt it would help them in their daily lives.

The takeaway from benchmark interviews was deepened understanding of different aspects of digital service design projects' best practises, challenges, benefits, tools and methods. These will be used in the later chapters as advice. Next benchmarking is done to understand the competitor's solutions.

**Searching for competitor's portal solutions**

During the discover phase, it was valuable to find out whether competitors in the same field already had developed a client portal solution, and if they had, which features the portal contained. A competitor analysis was done covering altogether 10 competitors of different sizes, from which three competitors are global companies. For large organisations, both local sites as well as group sites were searched, and several engine searches made. The search was solely focused on public websites by all ethical research principles with a high respect for all the competitors. Benchmarking competitors' websites and possible solutions for portals was done by using search engines with the following search words: "client portal food services", "extranet food services", "client portal (company name)" and "extranet (company name)".

One main competitor, a global company A, has a portal and another global actor, B, has it with a very high probability. When it comes to other competitors, they might have a portal, but it is less likely, as no related information was found. It is relevant to add that all four companies within the framework agreement need to have had some portal solution to have been able fit the requirements. Table 7 describes the portal content and benefits of the portal of company A and B. Both offer various services including food services and facility services.

| Company A | Company B |
|---|---|
| **CONTENT**<br>Communication:<br>-monthly reports<br>-news updates<br>KPI's<br>Event-page<br>Feedback system & commenting<br>Take away order system<br>Employee profiles<br>Company related information<br>**BENEFITS**<br>+ a strategic role in building relationships with key clients<br>+ service quality is lifted to a new level<br>+ fast communication together with clients and inside the organisation<br>+ capability to react fast to client's needs. | **CONTENT**<br>1. Document archive<br>-content creation<br>-material uploads<br>-sharing<br>2. KPI Dashboard<br>-reports<br>3. Personal profiles<br><br>**BENEFITS**<br>+ simultaneous use -> synergy<br>+ enhances the strategic point of view<br>+ improves processes<br>+ cost efficiency<br>+ added value to clients |

Table 7: Competitors' portal content and benefits

The company A, has been an example of a great extranet client provider in a book by Grönstedt (2000, 212) focused on world-class companies in integrated marketing and communications. According to Grönstedt (2000, 212), "the extranet plays a strategic role in building relationships with key clients" and has lifted the service quality to a new level. It has enabled fast communication with clients and inside the organisation, and capability to react fast to clients' needs. The partner building the portal, Secoya (2017), describes that the B2B client portal is focused on facility and service requests, and contains a catering portal with customer tailored information not only about catering, but also about restaurants and other info. According to the business development director (Grönstedt 2000, 212) of the company A, their portal has one area for documentation including procedures, agreements and other documents connected to the specific client. Second area, communication, contains monthly reports and news updates. Third section shows quality KPI's according to client's wishes. According to Secoya (2017), the portal contains user-friendly design and navigation, menus, event page with a link directly to the front page, feedback system for each location where comments and suggestions from customers are sent directly to the kitchen, take away order system, and employee profile page with detailed information about restaurant staff. The web page has also a photo of the portal's front page. According to the photo, the portal also has environmental, wellbeing, and supplier related information.

The other competitor, company B, has very likely a portal, as it is described on their company news site (Secoya 2017). It is nevertheless unknown whether this portal is used in Finland. According to Agasthi (2016), the portal offers a customizable interactive real-time platform dashboard including key performance indicators (KPIs). Agasthi (2016) adds that the portal with its role based KPI-access rights enables people to access concurrently the same data, which leads to enhanced synergy, collaboration and performance. The portal acts as a document archive, and allows content creation and material uploading, sharing, as well as personalised views. Agasthi (2016) states that the benefit of the portal is to be able to show detailed data and charts, and present them in various screens with different thresholds. This enhances, from a strategic point of view, the ability to estimate trends, improve and standardise processes, control cost and improve added value to clients.

### 4.2.2 Internal interviews

Instead of directly interviewing the B2B customers, it was necessary to start by digging information inside the organisation, and trying to understand who is the internal client of the tool, and their point of view for the portal development concept (Figure 25). **The goal of internal interviews** was to map the organisation's needs, challenges and benefits of the portal as well as stakeholders related to the system.

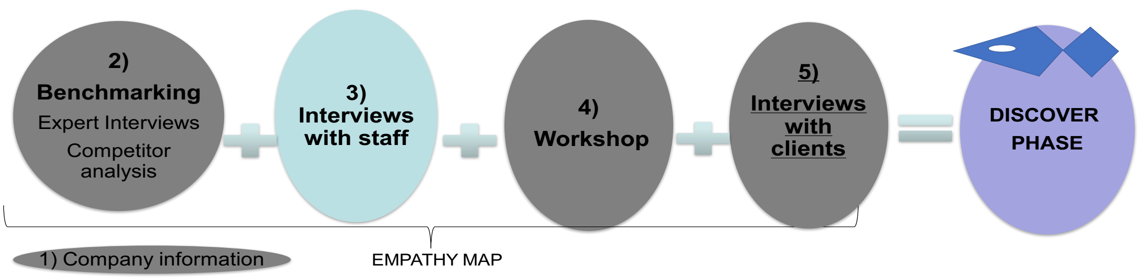



Figure 25: Interviews inside the organisation as one phase within the discover phase

Interviews in this study can be considered as semi-structured in-depth theme interviews, as an interview guide was used to get answers to the main themes (Ojasalo et al., 41; Pigues &

Alderman 2010, 57; Silverman 2011, 162). The initial idea was to have group interviews. As the internal interviews started during summer holiday season, it was hard to find a suitable time for a group interview. Therefore, the interviews were mainly single interviews with one pair interview.

In service design, silent knowledge hidden in organisations is revealed by emphasizing **inter-disciplinary participation** (Schneider & Stickdorn 2010, 58), therefore people invited to the internal interviews as well as to the workshops represented different roles and departments. Most of these people were also inner clients of the concept being developed. The initial presumption was that the operations, especially the account managers, are the internal clients of the portal, therefore their portion of the interviews was emphasised. They were also the source for the B2B client interview contacts. As the account managers are right in the touchpoint connected to the B2B customers, it was natural to ask them for suggestions of clients interested in the concept development project. The B2B client segments are very heterogenic in the company, which made it challenging to decide which clients to interview.
Eleven people from the following operations were interviewed: operations, digital development, finance, quality, procurement, sales and ICT (Table 8). Interviews were conducted in Finland, except for one interview done online to Sweden. Account managers, operations managers, restaurant managers, a digital solutions developer, a business controller, a procurement manager, a quality manager and a head of sales from the Nordic level were interviewed for approximately one hour. Interviewees were coded by letters A to K. In order to keep the interviewees anonymous, it is not revealed which code represents which role.

| Interview role | Interviewee profile | Duration |
|---|---|---|
| **ICT**<br>- **1 person** | To gather insight of the existing portal solutions in the company and to understand the background of the portal concept project. | 1.5 hour |
| **Operations**<br>- **5 persons** | To gather insight of the internal client perspective. / Mostly account managers but also restaurant managers | 1-1.5 hours per interview |
| **Quality**<br>- **1 person** | Among other questions quality reports and client feedback issues were discussed. / Quality responsible person | 1 hour |
| **Finance**<br>- **1 person** | Finance was interviewed to understand the dependencies between finance and operations especially the KPI needs. / Accounting responsible | 1 hour |
| **Procurement**<br>- **1 person** | Procurement gave insight to the data delivered to operations from their part and the possibilities being developed. / Procurement responsible | 2 hours |
| **Sales**<br>- **1 person** | Sales gave insight into the needs of sales and benefits of having a portal | 1 hour |
| **Digital operations**<br>- **1 person** | To gather insight of the previous plans for portal and understand the possibilities / A Digital developer with experience in digital projects. One person was interviewed. | 1.5 hours |

Table 8: Background of internal interviewees

The interviews were mainly open ones supported by a predefined interview guide consisting themes and questions (Appendix 3), which were visible only to the interviewer (thesis writer) and used to help in remembering the themes. A3 sized paper consisting the organisational point of view, as well as the questions relating to the client view, was attached on the wall in the middle of the interview to boost the interview (see Appendix 5).

After the interviews, the recordings were transcribed, coded, and analysed during a multi-phased process. The same type of content analyses was done here, as for the benchmark interview data using Brinkmann and Kayle's advice (2015, 215-248). First, the transcriptions were read and all the relevant insight of the first interview was written on sticky notes and attached on the wall. The recurring themes were defined as main categories. Having the main themes in place, all the transcriptions were coded by themes on the transcription paper (see example Figure 26). Coding was done by colours following the recurring categories which were:

yellow = needs: non-functional features, project management (think & feel)
pink = functional features needs (act & do)
black = organisational goal
orange = assumed client's needs
blue = customer centrism
violet = questions to the client
red = benefits (gains)
green = challenge (pains)

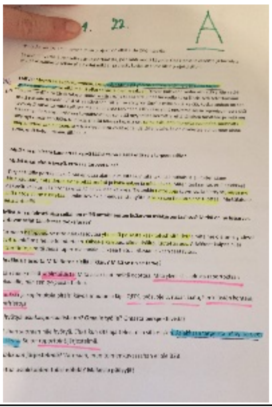


Figure 26: Coding by colours

Empathy map's categories seemed to emerge in the interviews. These were phrases describing "thoughts and feelings" related to non-functionalities, which were coded in yellow. More concrete needs such as features, and content were coded in pink. These were seen as "actions and doings" in the empathy map. Organisational goals were coded in black, and suggestions of client's needs and benefits were coded in orange. Blue defined phrases connected to customer-centrism, and violet were questions that the internal interviewees suggested to ask from the client. Red reflected benefits and green challenges, even though the colours are usually used the other way around. Every interview transcription was identified with letter from A to K, to the keep the interviewees anonymous. While coding and rereading, new insight was written on sticky notes and attached on the wall under their category (Figure 27), as well as underlined on the paper.

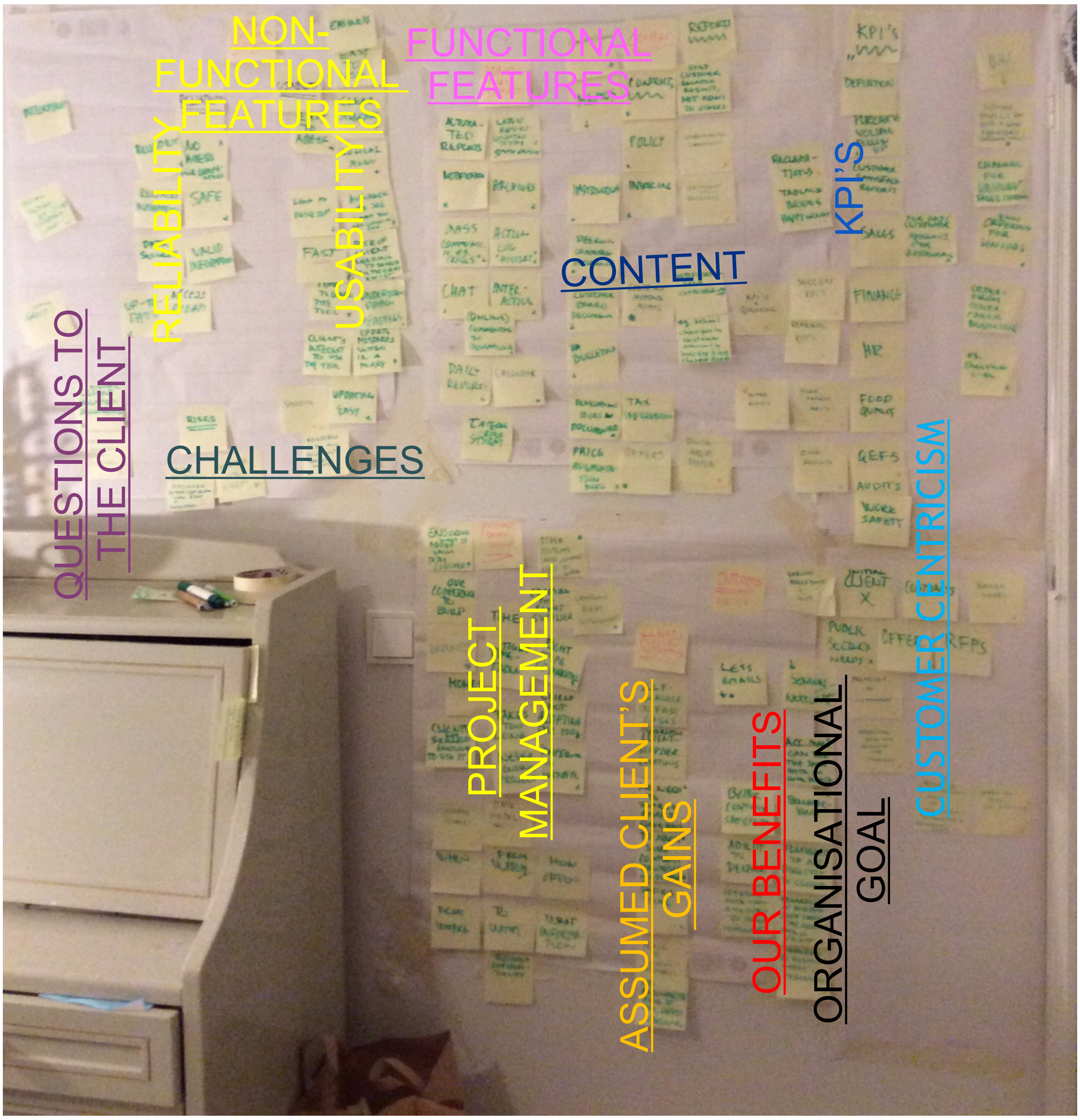



Figure 27: Categories on the wall before moving them to Mural

The content and structure were recreated online on a computer program called Mural and mapped into the empathy map. The empathy map based on internal interviews (Appendix 10) was later combined to the workshop categories and a combined empathy map was created. The analyses are presented in Chapter 4.2.5, together with the insight from client interviews. Internal interview quotes are in Appendices 13-18.

As interviewees' thoughts and ideas, value-in-use, are influenced also by their ecosystem as Heinonen and Strandvik (2015) define it, it is relevant to understand what they see is the eco-system of the portal. Therefore, they were asked to create mind maps in the end of the interview. The portal was drawn in the middle and the interviewee was asked to define stakeholders and systems the portal would need to be connected to, or that have an impact on the portal. This brainstormed more ideas following Liedtka and Ogilvie's advice (2014, 81-82). Altogether 7 mind maps (see Appendix 7, a) were created during the interviews. One mind map was created during the pair interview and one by the thesis writer by listening to the transcription of the Skype interview. The goal was to understand what the big picture and learn from the data as Liedtka and Ogilvie (2014, 81) put it. This was done by combining all these mind maps into one (see Appendix 7). One of the main parts of the mind map were the client's contact person, client's company, its departments, customer board, ICT systems and the client's client. The other main part was Fazer Food Services, its departments, systems and Fazer group. Connections to suppliers, subcontractors, potential clients, law and regulations were also drawn. This mind map is later combined to the stakeholder map created in the workshop, as during the internal interviews it became obvious, that the portal would affect various people working in different roles, and that there was a need for interdisciplinary, cross-organisational workshop to define the organisation's and clients' needs and challenges as well as the stakeholders linked to the portal. Workshop was an effective way of gathering data in a short time from various people.

#### 4.2.3 Ideation workshop

An ideation workshop (Figure 28) was organised to reinforce insight from interviews. In order to get multiple ideas at once, and moreover inspire and trigger motivation and interest towards the portal and to create a common understanding of the needs and challenges, the thesis writer planned the workshop. "Pains and gains" and "Stakeholder map" were chosen as the main service design tools, and "MeWeUs" (Nummi 2007, 35) and "World Café" (Schieffer et al. 2014) as the facilitation methods to co-creative and increase dialogue (Nummi 2012, 35). "Pains and gains" was also used and a stakeholder map created. In this study stakeholder map was used to reveal and visualize how different people, systems and stakeholders influence the portal or its user, and how close they are to the core of the map. A stakeholder map described the bundle of stakeholders, which all impact the overall service experience (Smaply 2016, 14-17). This combination was chosen out of many suitable tools, as these seemed to be flexible tools to fit in the situation, where the number of participants was undefined, and a co-creative mindset needed to be established.

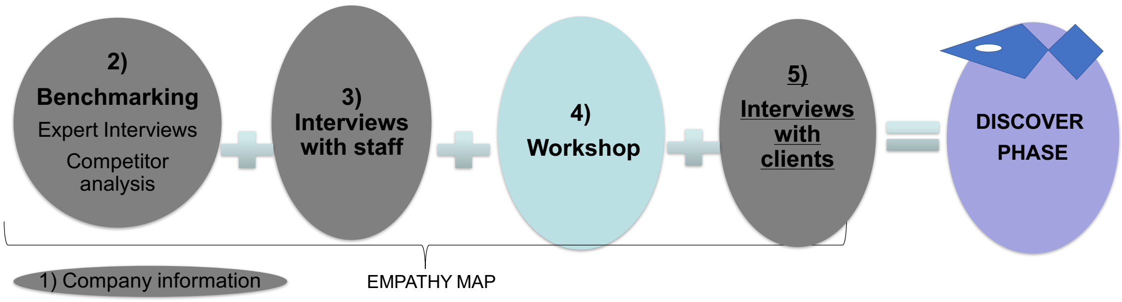



Figure 28: Workshop inside the organisation as one phase in the discover phase

The workshop was held on a Friday afternoon 25.8.2017, lasted 2 hours, and was facilitated by the thesis writer, as well as by the project manager. Three plans for the workshop process were created, as it was unclear whether the number of participants was four or seventeen. Only a few invitees had confirmed to join the workshop. The same plan would not have worked for different amounts of people. It was also known that two people could stay only for the first hour. Two hours before the workshop, the writer of this thesis decided to shortly visit everyone's room to describe the agenda of the workshop and how important their participation is to the workshop outcome, as it was possible that the idea of the workshop had not been well communicated by the thesis writer in the email. In the end, 14 people attended the workshop from a total of 17 invites. The workshop plan in Appendix 11 was used.

The workshop started by introducing the facilitators and the portal project. Also rules of the workshop and timetable (Figure 29) were shortly described. The "MeWeUs"-method and the "Stakeholder map" tool were explained to participants, and some examples of other stakeholder maps were attached on the wall to help them better understand the tool. The workshop attendees were split into three groups (see Figure 29). Every group was asked to name a designated table host to take notes on sticky notes, and to place them on a paper which covered the whole table. The mock-up used in interviews (Appendix 5) was placed on table 2 and 3.

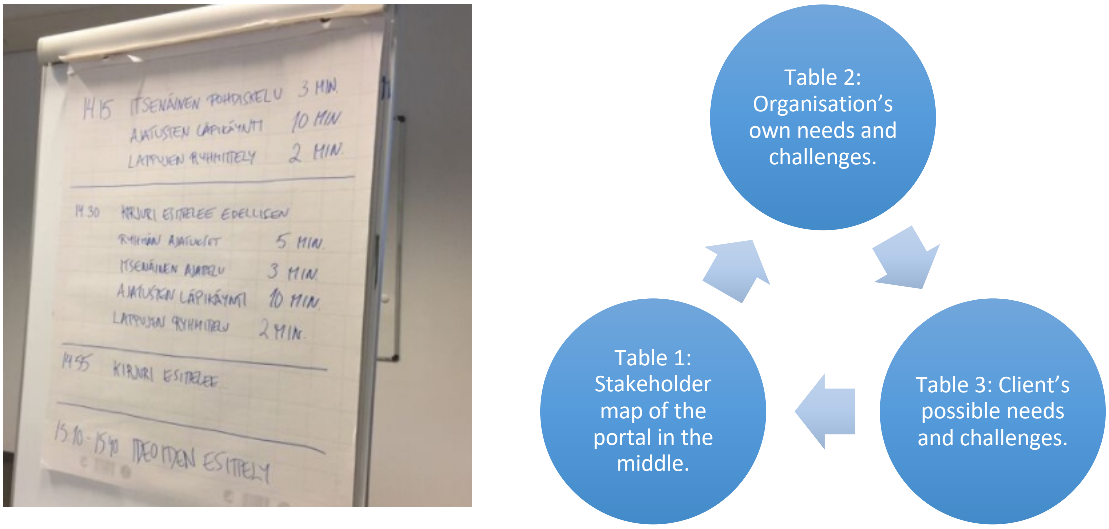



Figure 29: Workshop timetable (left side) and themes in different tables (right side)

The groups went through every theme: company view, client's perspective, and the stakeholder map (Figure 30). The table hosts did not change themes as their role was to take notes on sticky notes, group them and explain them to the new group. By following the idea of the "MeWeUs" the participants first ideated alone, wrote these ideas on post-its, and grouped them with the help of the table host. The table hosts also added some more notes during the discussion, the "we" part. The "us" part was the presentation of the ideas in the end of the workshop by the table host. This was audio recorded and transcribed later. A permission to record was asked from the whole group in the beginning of the workshop.


Figure 30: Groups working on stakeholder map (left side), needs and challenges (right side)

Below are pictures of the ready sheets covering client's needs and challenges (Figure 31), stakeholder map (Figure 32) and ideas of company's needs and challenges (Figure 33). These were translated to English in Figures 34, 35 and 36.

Figure 31: Client's assumed needs

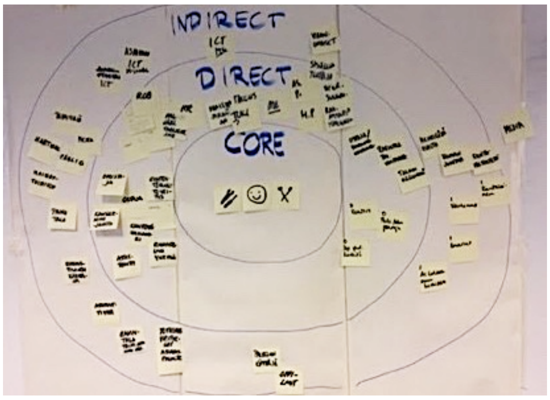



Figure 32: Stakeholder map

Figure 33: Company needs and challenges

The stakeholder map's core (Figure 34) was seen to link with the Fazer Food Services' personnel and ICT solutions. From the client's side, the owner, contact person, facility manager, assistants, and sourcing responsible were added to the direct circle. Also, municipality was categorised as its own group with principals. The outer circle had also roles in municipality containing media. Other outer circle roles were authorities, customer's ICT solutions, vendors, and meeting room users.

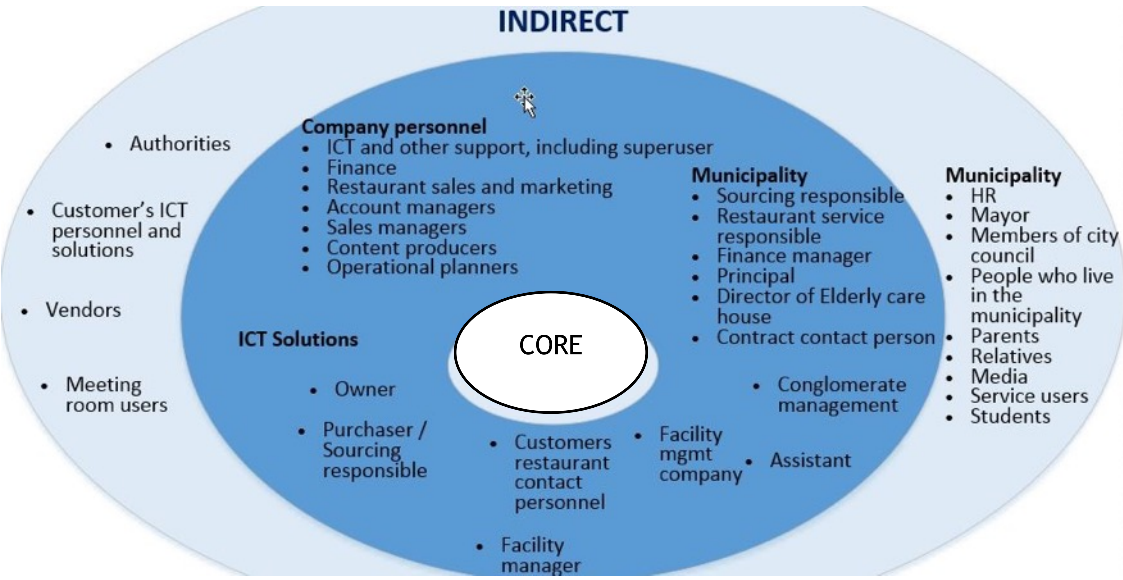



Figure 34: Stakeholder map

The workshop insight of client's assumed needs contained five categories (see Figure 35). The non-functional features, such as "easy to use", "a library for knowledge" were mapped into empathy map's "think and feel" part, communication, and content, such as saved discussion and archive, were mapped into "say and do". Benefits of the portal, such as transparency, was mapped into "gains", and challenges, such as who maintains the portal, were mapped into "pains".

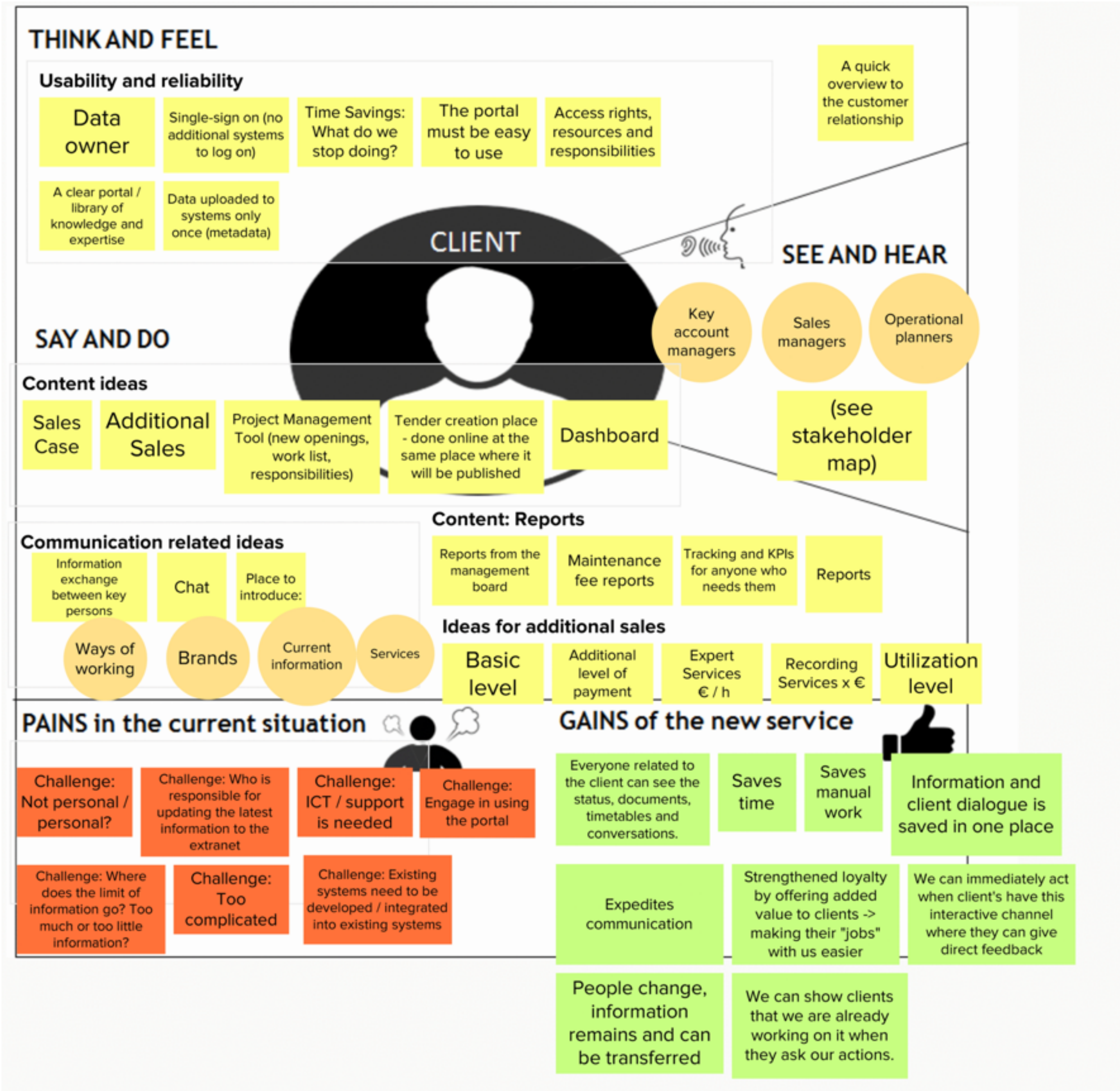



Figure 35: Client's assumed needs, challenges and benefits (translated post-its from Figure 31)

The company's empathy map (Figure 36 on the next page) consisted of non-functional features, as well as a customer-centric view of how customers should be invited to participate, as well as how the portal should add value to the client. It also had topics covering communication related needs, such as having an annual cycle, and content related topics, such as reporting and KPI's. Challenges were mainly related to portal maintenance. Benefits were also covered. It is already valuable to state that the tables mixed client and company discussions in both topics, and therefore these empathy maps are not solely of either.

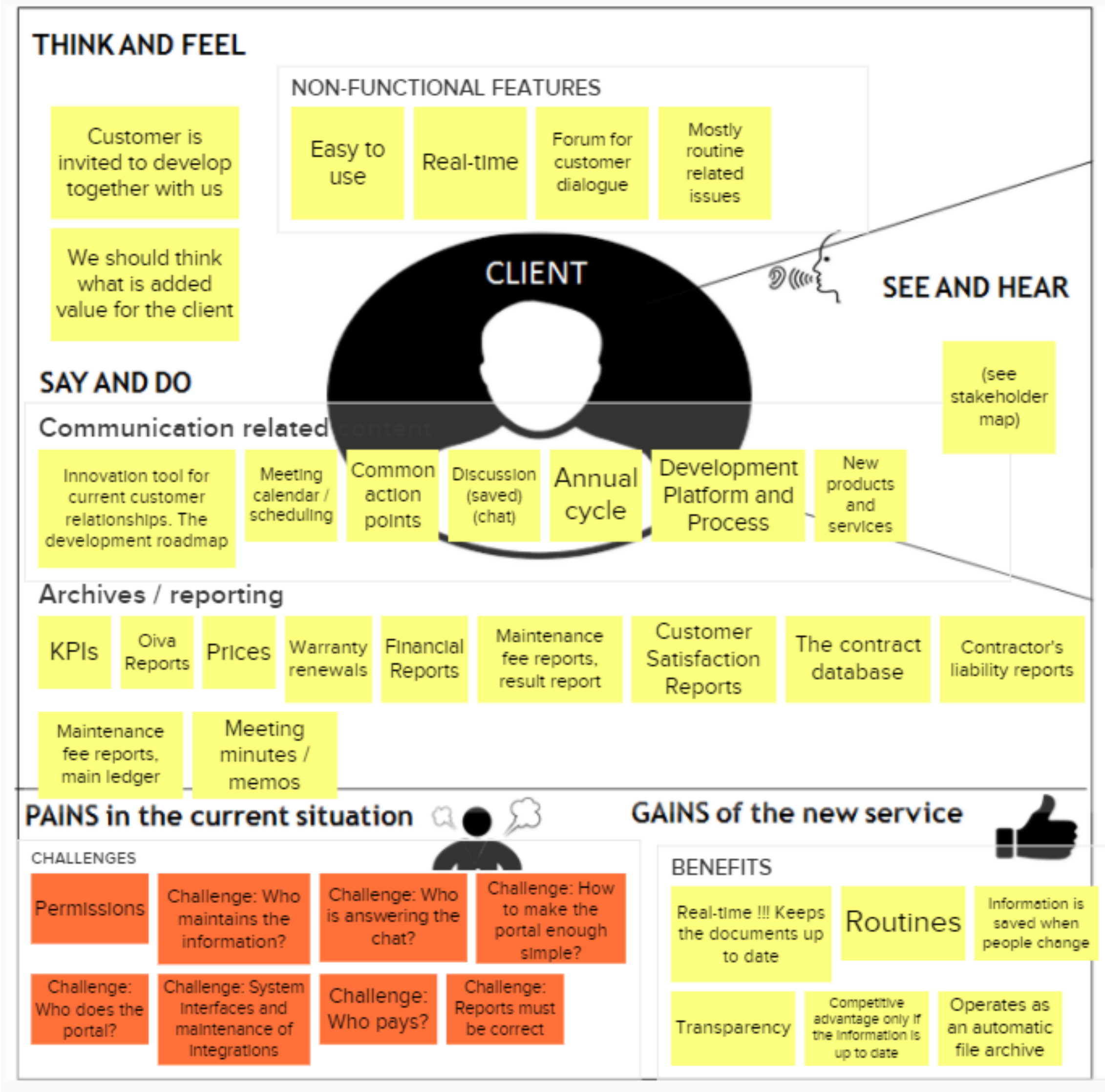



Figure 36: Company needs and challenges (translated post-its from Figure 33)

The content of the empathy maps will be discussed in Chapter 4.2.5, where empathy maps were further added to a "main" empathy map consisting all internal interview, workshop and client interview categories. Also, the stakeholder map in Figure 34 is combined to the main stakeholder map combining all interview mind maps and the stakeholder map done in the workshop. Next, the empirical part moves to the client interviews.

### 4.2.4 Client interviews

The most important part in the discover phase were the **client interviews**. According to Pigues and Alderman (2010, 54, 57, 164, 177, 181-182), interviewing customers should be a self-evident part when discovering how customers perceive value. Following their advice, interviews with B2B customers meant purely listening to the customer, not selling, solving or trying to justify the company decisions.

The goal of client interviews was to understand and categorise client's and organisation's needs, challenges, and benefits of the portal. Client interviews are the last part of the discover phase (Figure 37). The discover Chapter 4.2 ends with a closure chapter describing the insight from workshop and interviews on which the minimum viable product is based on.

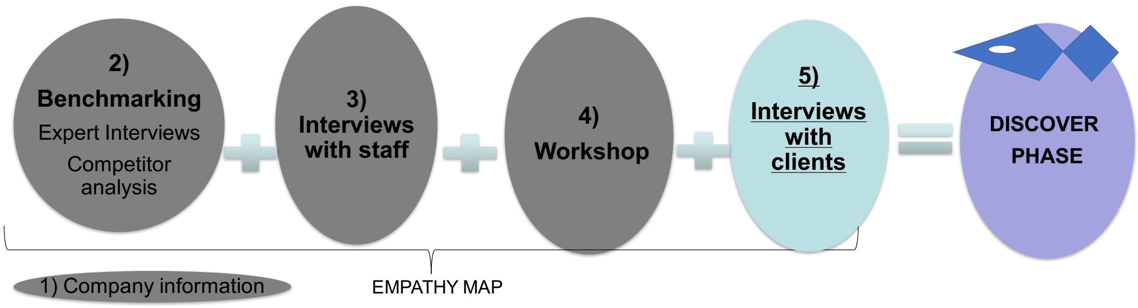



Figure 37: Client interviews in the discover phase

First, the B2B clients needed to be engaged to the study. An initial question of interest to be interviewed was asked by the account manager. The interviewer had defined a text to be used for the emails. The interviewer then called or emailed the client. Only one client refused to participate, so the interest in the subject was relatively good.

Altogether nine clients were interviewed from the following client segments (Table 9):

| Client interviews | Interviewee company profile (all client contact persons) | Duration |
|---|---|---|
| **1 University** | Education | 1.5 hours |
| **3 Business industry companies** | Industry and hardware | 2 hours |
| **2 Public offices** | Government | 1-3 hours |
| **1 Business company** | Insurance | 1 hour |
| **1 Real estate operator** | Business park | 1.5 hours |
| **1 Health sector** | Public health sector | 2 hours |

Table 9: Background of the client interviews

Three clients had management fee contracts and six had own risk agreements with the company. The main agreements are management fee agreements and own risk contracts. The management fee agreements are based on the idea that the client takes the restaurant profit risk and pays for the costs. In those accounts, the profit data must be visible to the client, whereas in the own risk agreements the company is responsible for the profit and keeps that information to itself.

After reading the transcriptions several times, same categories seemed to emerge (Table 10). Interview coding and analyses followed the same steps as in the other interviews, and were done according to qualitative study principles by Brinkmann and Kayle (2015, 215-248). The client interview transcriptions were coded by highlighting the texts by the colour defined directly to the document. According to content analyses, categories such as communication, using emails and feedback emerged in the transcriptions. They included “thoughts and needs”, but also challenges which the clients have to tackle. The interview material also included various thoughts and descriptions of activities related to portal features and content. Stakeholder related sentences were also categorized. Sentences specifically related to risks and challenges had their own category. The same applied to benefits related of having a portal someday. Sentences of habits related to mobile and PC use, earlier experience of portals and issues related to other topics were also categorised. Some sentences were categorised in several categories.

**1. COMMUNICATION RELATED CODES**
Interview code colours (PAINS) Challenge / Need / Communication
Interview code colours (THINK AND FEEL) Need / Communication
**2. FEEDBACK (& COMMUNICATION) RELATED CODES**
Interview code colours (PAINS) Challenge / Need / Communication / Feedback
Interview code colours (THINK AND FEEL) /Need / Communication/Feedback
Interview code colours (SAY AND DO) / Need / Email content
**3. PORTAL FEATURES**
Interview code colours THINK AND FEEL) / Need / Non-functional features
Interview code colours (SAY AND DO) / Need / Functional features
4. PORTAL CONTENT (SAY AND DO)
Interview code colours Need / Content of reports:
Interview code colours Need / Content
**5.STAKEHOLDERS**
Interview code colours (SEE AND HEAR) / STAKEHOLDERMAP
6.RISKS (PAINS) Interview code colours / Risks
7.BENEFITS (GAINS)
Interview code colours Need / Benefits
OTHER CODES
8.HABITS / Interview code colours (SAY AND DO)
9.PORTAL EXPERIENCE / Interview code colours (SEE AND HEAR)
10.ISSUES RELATED NOT RELATING TO THE PORTAL BUT AFFECTS THE CLIENTS
Interview code colours Other issues

Table 10: Coding categories by colour

After coding the sentences in the texts, the quotes were copied to a Microsoft Excel sheet, in which categories in columns had the same colour as the codes (Appendix 12). Clients also had their own coloured rows for a better view when sorting by categories. During coding, it was noticed that some client quotes referred to a certain need as well as a bottleneck/challenge linked to the category. These were split into two columns: challenges and needs. Every client had its own code, e.g., A1 and B1. Benefits were also discovered, and if the interviewee mentioned any stakeholders, those were coded.

After categorising transcriptions, the main points were mapped into the empathy map (see Figure 38). These categories seemed to follow the same pattern as the internal interviews, but contained more ideas. Usability and reliability were main topics in discussions related to "thoughts and feelings" (violet boxes). Topics related to "act and do" were content, features and functionalities. Those are in the green boxes. Challenges and benefits were also mapped (red and blue boxes).

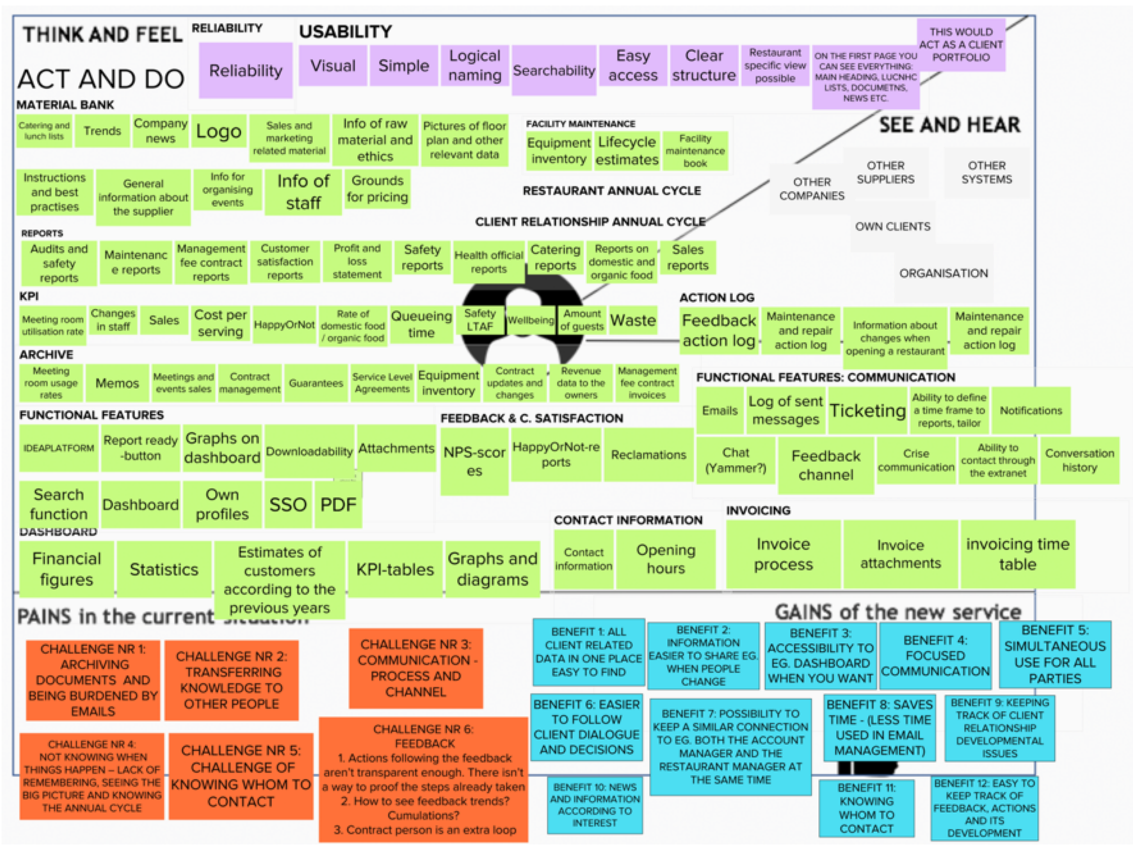



Figure 38: The client interview empathy map

From all the four phases of the service design process Double Diamond model, the discover phase was emphasized in the empirical study, and as its interview and workshop results are linked to the minimum viable product presented in the define phase (4.3.), those are presented in the next chapter before moving any further. The study findings from the competitor analyses, benchmarking interviews, as well as personas are presented later in Chapter 5 together with personas.

### 4.2.5 Results and insight from interviews and workshop

The previous chapter was the last part of the discover phase, which focused understanding the scope of what should be developed—the needs, challenges, and benefits of the client portal.
Chapters 4.2.1-4.2.4 presented empathy maps with different categories that emerged in the interviews and workshop. This chapter focuses on understanding what those empathy maps tell us, and unifies data and insight. An analysis needs to be done to achieve the several goals of the discover phase. One goal is to map differences and similarities between client's and company's needs, challenges, and benefits. Also, an analysis is done on how the company describes the client's perspective and understand the big picture of all the users and stakeholders related to the portal and create client personas (presented in Chapter 5). These analyses are all needed to meet the main development goals presented in the introduction:

- What should be taken into account when building the portal (what are the challenges, stakeholders and users)?
- What should the portal be like (e.g. non-functionalities)?
- What kind of needs do the clients and the company have (content and features)?
- What are the benefits of the possible portal?

All the qualitative data from interviews and workshop "think and feel", "say and do" as well as "see and hear" described needs from different angles. "Think and feel" were more abstract, descriptive needs and "say and do" were concrete needs for content and functionalities. "See and hear" were indirect needs partly derived from stakeholders' influence, but also direct needs from systems and other possible portal users. The main categories (see Figure 39 text in yellow) emerged both in internal and client interviews, as well as in the internal workshop. These were non-functionalities such as reliability and usability, functionalities and content, challenges and risks, as well as benefits.

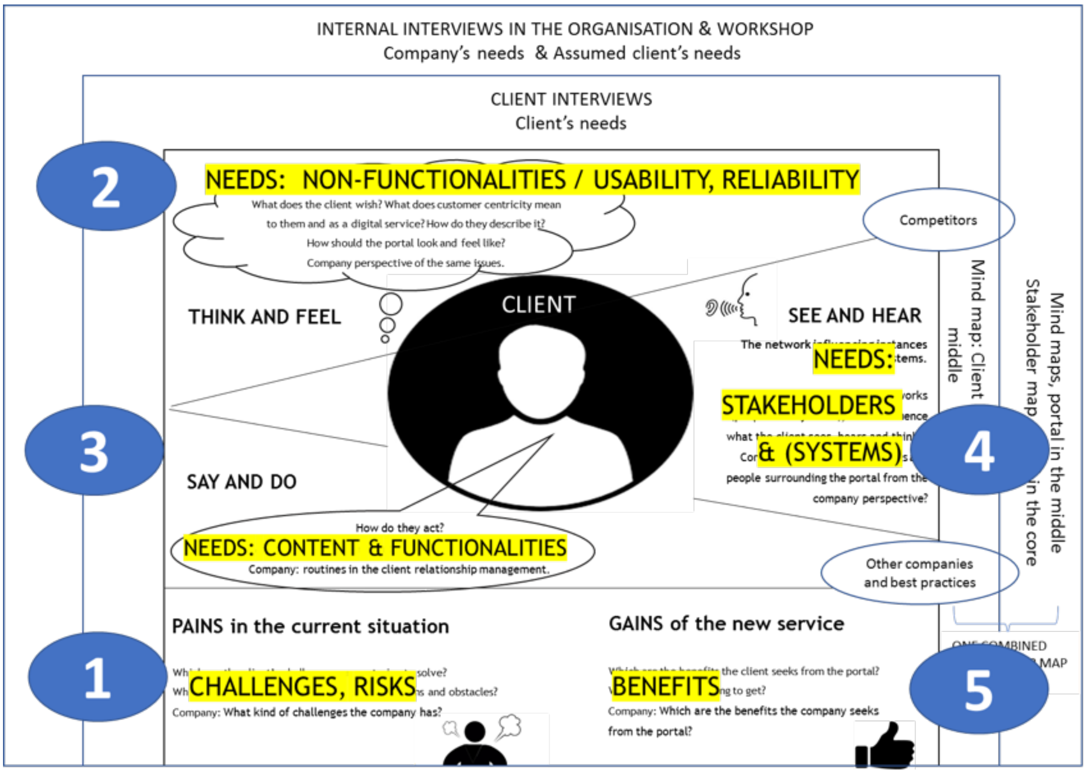



Figure 39: Main categories in the discover phase and the analyse order

Every empathy map from internal interviews (Appendix 10), workshops (Figures 35 and 36, pages 80-81) as well the client empathy map (Figure 38, page 84) were analysed separately during the study, after which the empathy maps were unified into one big empathy map containing all the different needs, pains and gains. Combining them was necessary to be able to see the big picture and whether there are differences in needs, pains and gains between the company and the clients. Figure 40 (see next page) is the empathy map which combines the client and company empathy maps.

To point out the differences and similarities between clients and company insight, all the different perspectives are brought together into tables. The analyses contain several tables with lists of needs. Some answers might overlap. The quotes can be read in the Appendices 13-18. The unified empathy map in Figure 40 is analysed according to the order from 1 to 5:

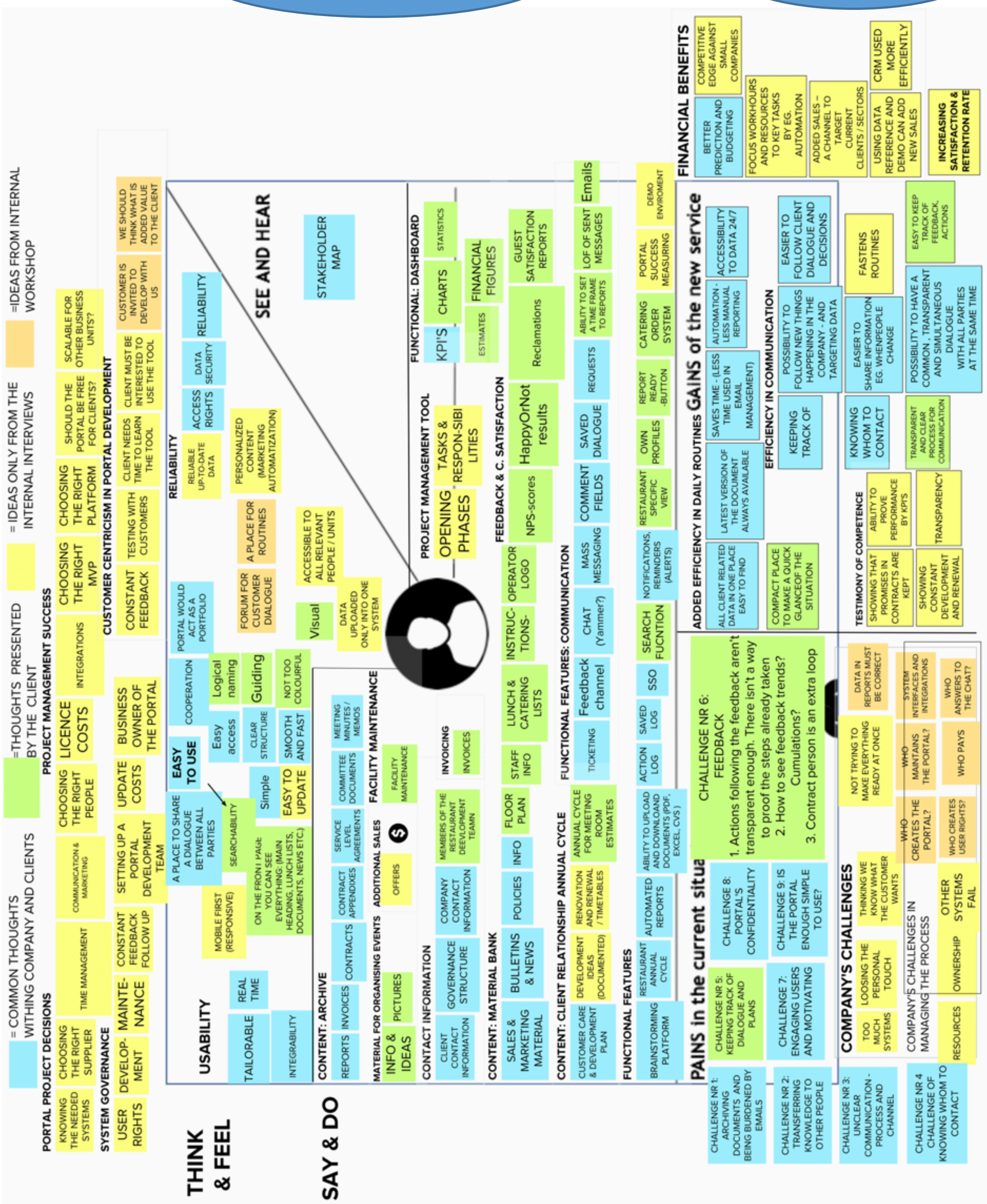
1) First, challenges and risks (1) are analysed in order to understand the current situation the staff and the clients are facing, and what kind of risks they perceive. These are discussed in the section: **What should be taken into account when building the portal, and what challenges, stakeholders and users exist?**
2) Second, the needs are discovered by moving from feelings and thoughts (2). These are discussed in the section: **What should the portal be like: (think and feel)**

3) Interviewees' and workshop participants' concrete portal solutions and content (3) are presented in section: **What kind of needs do the clients and the company have (say and do)?**
4) Fourth, the perceived benefits of the portal (5) are discussed in: **What are the benefits of the possible portal (Gains)?**
5) Last, the stakeholder map (4) is analysed, as it gives a wider perspective to where those needs can also derive from: other companies, public services, other systems etc.: **Stakeholders linked to the portal (See and hear).**

The blue notes in Figure 40 are the ones which were mentioned both by the client and the company. The green ones are ideas which only the client brought up. The yellow notes are ideas which only the company presented. The light yellow are notes from internal interviews and workshops, and the darker ones came up only during the workshop.

5 NEEDS: Stakeholders & systems

4 GAINS: Benefits




2. NEEDS: non-functionalities /usability and reliability

3. NEEDS: con-tent & functionalities

1.PAINS: challen-ges & risks

Figure 40: Unified empathy map for portal creation

**1) What should be taken into account when building the portal?**

Building a service should be based on real needs which can resolve a challenge the client is currently facing (Tschimmel 2012). Needs can be also derived from direct needs without being caused by any deficit. Being able to build a customer-centric digital portal requires seeing the world through client's eyes and knowing their pains, therefore this discussion starts by presenting challenges (see Figure 41):

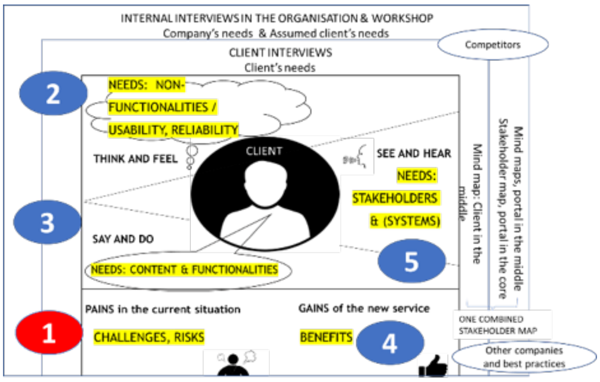



Figure 41: First phase of results: Challenges

**Challenges and risks: Pains**

Table 11 on next page combines challenges of the current situation under the same category from client's and company personnel's quotes (see also Appendix 13). The last column, "assumed", describes company's assumption of client's challenges. Challenges from 1-9 are risks and challenges both the client and the staff mentioned. After the common challenges are the company's own pains related to the portal system management and the system itself. These resemble more risks than challenges.

According to the results, it seems clients and the organization share seven challenges, of which three are related to risks which both parties perceive in the portal. Rest of the challenges were only mentioned by the client or the company. The staff comments were mostly related to concept management and resources.

| CATEGORIES | CLIENT | COMPANY | ASSUMED |
|---|---|---|---|
| **COMMON CHALLENGES RELATED TO THE CURRENT SITUATION** | | | |
| **CHALLENGE NR 1: Archiving documents & being burdened by emails** | Too much time is used in reading and archiving emails and attached documents. Important information might be lost and the worst are the paper versions. | Too much manual work. Documents are sent in emails. The company might have a different version of the document than the client. | There should be no need for the client to wonder, which is the latest version of the document. |
| **CHALLENGE NR 2: Transferring knowledge to other people** | Changes in staff causes problems if information is stored in emails. Access to the relevant data should be possible without contacting the provider. | In case of changes in staff the new ones should know what's been agreed. | |
| **CHALLENGE NR 3: Unclear communication - process & channel** | Communication seems chaotic and changes in plans are not communicated in time. | All parties should be equally informed: restaurant managers, account managers and client. | |
| **CHALLENGE NR 4: Challenge of knowing whom to contact** | It should be clear whom the client should contact in specific cases. | Fetching contact information is time consuming. | Knowing who is in charge of what is important. |
| **CLIENT'S CHALLENGES RELATED TO THE CURRENT SITUATION** | | | |
| **CHALLENGE NR 5: Keeping track of plans** | Having too little time to stay tuned and making sure things are going according to plans and ideas are not forgotten—annual cycle could help. | | |
| **CHALLENGE NR 6: Feedback tracking & sharing** | Actions following guest feedback are not transparent enough. There is not a way to proof the steps already taken. How to see feedback trends and possible cumulations? Guests should send feedback directly to the provider. Once a year survey is too heavy. | | |
| **COMMON CHALLENGES RELATED TO THE PORTAL** | | | |
| **CHALLENGE NR 7: Engaging users & motivating** | There is a risk if people do not start using it. | Money and time is lost if people do not start using it and resist it. | |
| **CHALENGE NR 8: Confidentiality** | Integrations to the client's systems need to be safe. | Confidentiality must be ensured. | Our systems should be safe for the client to access. |
| **CHALLENGE NR 9: How to make the portal simple enough** | It should not be complicated to use, otherwise people do not use it at all. | It should not be complicated to use. Single sign-on is necessary. | For the clients it has to be easy, fast, and safe. |
| **COMPANY'S CHALLENGES** | | | |
| **Current challenges in reporting related tasks** | Maintenance fee reports require manual work and a lot of time. | | |
| **RISKS IN THE PORTAL SYSTEM AND ITS PROJECT (Company perspective)** | | | |
| **Losing the personal touch** | Face-to-face contact should not be forgotten. | | |
| **Yet another system** | Services should come first, not the system. The number of new systems is overloading. | | |
| **Thinking we know what the customer wants** | Imagining what the clients wants instead of asking them. | | |
| **Not trying to make everything ready at once** | We should not try to make things too perfect immediately. | | |
| **Data accuracy in reports** | Data needs to be accurate in the portal | | |
| **Unifying tailored reports** | Own risk reports are all different. Unifying them is a challenge. | | |
| **Managing the process** | How to ensure resources (money, people to maintain, answering the chat, creating user rights) is a challenge. Creating system interfaces, working integrations, and ensuring data accuracy is a challenge and not having a clear ownership of the portal is a risk. | | |

Table 11: Challenges and risks perceived by clients and staff (quotes in Appendix 13)

*Common challenges related to the current situation*

The first challenge, finding and **archiving documents** from emails, was mentioned as challenge more often by clients. But internally it was also a bottleneck. It takes time, and Outlook, for example, is not a tool made for archiving documents. Clients seem overwhelmed with the number of mails and feel unable to keep track of important messages. Also, people struggle with the amount of email. They also seem to understand that clients have trouble keeping track of the documents when they are sent in emails, and that it is not always clear which is the latest document. Another issue is the paper prints, which clients feel are not user friendly and still require an old-fashioned way of archiving or scanning.

The second challenge is **transferring knowledge** to new staff members and other people, as well as saving the history data of past decision. The clients also mentioned that they'd like to get access to data without having to ask it separately from the company. From the company perspective, the importance of knowing that the client has the latest version of the document is relevant, especially when people change jobs.

The third challenge is about lack of clear **communication**. Changes in restaurant openings should be better communicated to the guests and clients. This lack of communication leads to a bad first impression, which is hard to change afterwards. People are more merciful when they know to not to expect what they were first promised. A client which has a large number of restaurants feels that the communication process between the client, restaurant managers and the account manager is a bit chaotic. In other words, there is a challenge to connect directly several restaurant managers with the same message and saved dialogue. The feeling of not knowing, what has been agreed between the account manager and the client, came up also during an interview with a restaurant manager.

The fourth challenge is that the client does not always know, whom to **contact** and who is responsible for what, especially if it is someone else you normally contact. This was also mentioned in the internal interviews, and the client's pain of not knowing whom to contact when the account manager is not available was recognised.

Clients mentioned a fifth challenge: knowing and remembering what is going to happen in the **future**. An idea of annual cycle came up. The challenge is to remember all the restaurant campaigns as well as ideas, events, meetings etc. related to the client relationship. This was not mentioned as a challenge by the company, but it was mentioned in their wish list as a good thing to have as a feature in the portal.

Sixth challenge, which only the clients brought up, was related to **feedback**. For the clients, it seems to be a burden. They want to have a system to track whether actions have been taken, so that they can also themselves inform the guests. They want to have a quick access to current feedback, the trends in it and have a better ability to prevent any reclamation from cumulating. They neither want to be the ones sending the guest feedback to the account managers and restaurant managers. They'd like it to go directly. They also feel that the guest satisfaction survey done once a year is too heavy and only measures a cross-section of a moment.

*Common perceived risks related to the portal*

The three other challenges both the company and the clients share are related to the portal concept. Both point out that the portal is useless, unless both parties **engage** in it. Company-wise there seems to be a slight reluctance towards the number of current systems. The internal workshops and interviews pointed out that, for the portal to be used by the clients as well as the company staff, they must be **motivated** to use it. They should be trained and ensured to have the required skills to use it. This takes time, and even though portal might save time in other tasks, people have to find time from their calendars to use the portal itself. It should be integrated to their normal work, their daily routines. The second portal related shared challenge was **confidentiality**. Clients think about how the portal is linked to their systems and whether it is safe or not. Inside the organisation people saw that one prerequisite was to ensure confidentiality and make sure that data isn't visible to wrong people. Organisation also saw it as an important factor to clients, combined with easy usage and speed. The third challenge is partly overlapping with the second one. Both clients and company point out the risk of building a **too complex** system, which will be shortly abandoned if it's too complicated to use.

*Company's challenges*

There was one key internal challenge the company currently faces: the amount of time used in **maintenance fee reporting**. The other challenges were related to the portal or its project. A risk of **losing personal touch** was mentioned in the interviews and in the workshop. There was a fear of the company forgetting the importance of face-to-face communication in client connections, which cannot be replaced by any system. A few interviewees inside the organisation feared whether the system will bring any benefits to the company. Another challenge was the fear of **"yet another system"** to adopt. There was a concern of building a technical solution, such as the portal, without developing and ensuring the real service process.

A risk of building a portal without knowing **if the client really needs it** was also perceived. This was related to the third and fourth company's internal challenges: building the portal without asking what the client wants, and trying to build something that **takes ages to finish** and becomes too expensive. The fifth and sixth challenges are practical ones, related to **risk of not having accurate data,** e.g., in the CRM system and whether **unifying reports** is possible. Other systems also might need development before any integrations to the portal can be done. It came up, that clients having an own risk agreement with the company are sent reports, which are rarely alike. This makes their automation a challenge.

The last company's internal challenge was about **managing and using the portal**. There was discussion in the workshop about the risk of users having to fill the same data twice, e.g., to the CRM and also to the portal. The second challenge was related to the risk of not having a clear motivated owner for the portal, which leads to lack in development and decisions. Other challenge was the lack of resources: money, people, and competence. Who updates the portal and how often? It was mentioned that using the portal might cause frustration if it is not easy to use, and what if mistakes happen if updates are done in a hurry? This leads to the challenge of integrations—whether they work or not. Last but not least is the challenge of who takes care of the chat service, as someone has to be online to reply to the possible questions.

**2) What should the portal be like: Think and Feel**

Challenges often create needs. Therefore, they were discussed first, and now it is time to discuss needs from how they emerge in thoughts and feelings. This is the second section of interview and workshop insight (Figure 42).

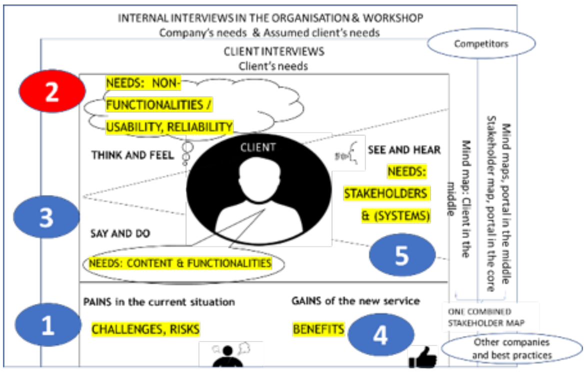



Figure 42: Second phase of results: think and feel

Table 12 (next page) describes the non-functional needs analysed from the quotes by clients and staff (see also Appendix 14). The main thought among clients and inside the company was that this portal could serve as **a client relationship portfolio and a forum for common dialogue**. The clients showed a lot of interest into having the portal, and their attitude was very positive. The staff was more reserved. Though, what they saw as a great plus was the portal acting as an instrument of cooperation.

**Reliability** issues came up mostly in the internal interviews. There were mainly two types of reliability requirements. One was about data quality and the other about data security. The clients did not question data quality at all; for them, reliability was about data security and more of a basic requirement. Internally data quality and the need to keep it up-to-date was discussed as mentioned earlier. Data security and usage, as well as user access rights and smooth data flow, were considered important inside the organisation. The company also assumed that getting data in time, reliably and accurately is important to the clients.

| CATEGORY | CLIENT | COMPANY | ASSUMPTIONS |
|---|---|---|---|
| GENERAL FEELINGS AND THOUGHTS | | | |
| **This would act as a portfolio** | Everything would be in one place. | It would be a forum for client dialogue. | |
| **Positive interest** | Clients are eager to get the portal and take part in testing. | This would the tool to manage client relationships together with the client. It would prove our capability of digital development. | |
| **A place to share information between all relevant units / people** | Restaurant manager should have access to the portal. | Everyone who is linked to the case should have access to the portal. | |
| NON-FUNCTIONAL FEATURES—FEELINGS AND THOUGHTS | | | |
| RELIABILITY | | | |
| **Reliability in general** | Reliability | Easy, safe and in time data. | |
| **Data security & access rights** | Data security | Company confidential data should not be accessible. | |
| **Reliable up-to-date data** | | Data must be up-to-date. | Reliability of KPIs promised in contracts. |
| USABILITY | | | |
| **Tailorable** | Personalised client profiles. | Personalised client profiles. | Flexibility to create client specific reports and interfaces. |
| **Real time** | Real-time is always a wish. | Real-time would be a benefit. | |
| **Integrability** | The system should be easy to integrate. | | |
| **Data filled only in one system** | | Data should be saved in one system. | |
| **EASY TO USE** | Access and navigation should be fast and easy. SSO and good front page and search functionalities is needed. No extra features or information but it should be visually good looking. | Clear structure and simple to use. Data needs to be found easily. | Easy to access and clear interface. |

Table 12: Non-functional features of what the portal should be perceived by client and staff (quotes in Appendix 14)

Portal's **usability** was a theme which came up both during the interviews and the workshop. The portal needs to be tailorable in order to the clients to see only what they want to see. The company also assumes that clients want to see what is promised in the contracts. Both parties also preferred the portal to be real-time. The word "easy" was mentioned several times, and it is one of the biggest subcategories under usability. It was defined in very different ways. Both client and company define easiness as having a clear structure with a logical menu and understandable headings, as well as a guided visual customer path in the system. Also, login needs to be smooth, maybe even without any passwords by single sign-on (SSO). Clients do not want the portal to have too much irrelevant information, and they prefer it to be less colourful. They want information to be easy to find, which was also understood by the company as one client's criteria. Internally it was also mentioned that updating the portal needs to be easy, and no data should be filled twice to different systems. Clients also mentioned the importance of working integrations.

*COMPANY: GENERAL FEELINGS AND PORTAL SYSTEM DEVELOPMENT & MAINTENANCE*

The main thought inside the company was that this portal would ideally be the place for routine-like client-related tasks. Therefore, they also reminded how important it is to give access to all relevant people linked to the account. Interviews and workshop discussions brought up also a need for a robust project and system management during the portal building phase and after.

The portal system development project as well as future system maintenance raised a lot of feelings and thoughts inside the organisation (Table 13). Right decisions need to be made concerning resources, systems, and platform. The project should begin by deciding the minimum viable product as well as suitable suppliers and partners. An important decision which influences the later development is choosing the right platform. This has to do with what kind of integrations can be created. Ideally the platform is scalable to other future portals, for example, to other business units and countries. Project management should take care of educating and motivating the users. This can be supported by making a marketing and communicating plan for the portal. It was also discussed during the workshop, whether the portal should cost something to the customer, or should it be free. Also, it should be scalable to other business unit's and countries' needs.

| COMPANY THOUGHTS AND FEELINGS—IDEAS IN GENERAL (A) | |
|---|---|
| **A PLACE FOR ROUTINES** | This should be lean and ease routines. |
| **PORTAL PROJECT RELATED THOUGHTS** | |
| **Thoughts:** Having enough resources, competence and choosing the right people on board, the right MPV and supplier. Knowing the needed systems and integrations, choosing the right platform, time management, communicating and marketing, should the portal be free for clients, licence costs, scalable for other business units. | |
| **PORTAL GOVERNANCE RELATED THOUGHTS** | |
| **Thoughts:** deciding the business owner of the portal, setting up a portal development team setting up a maintenance team, user right support, constant feedback follow-up estimating the update and development costs. | |

Table 13: Portal project and maintenance perceived by client and staff (quotes in Appendix 15, A)

Another internal issue was (Table 13) how will the system be managed and maintained, once it's up and running. Decisions need to be made concerning who will own the portal, so that it will have a link to business. Also questions, such as how to ensure the portal is constantly monitored, and who manages user rights and costs, should be answered. The interviewees brought up how critical it is to plan an active and well-working team around the portal. The portal has to be constantly developed and maintained by people with clear role descriptions and responsibilities. Decisions need to be made concerning who makes sure the latest data is in the extranet. Integrations need experts to ensure their unbreakable functionality. The portal usage can be measured with a specific KPI measuring the site, and the same functionality can collect feedback of the client portal from the users.

In the Table 14 below are the company's thoughts about the client's needs. Knowing what is added value to the client is seen very important. Making clients' life easier is considered as added value. Developing and testing together with the client are first steps to take, to ensure the concept is fit to their needs. They also need time to learn, which can create a common engagement to use the portal. In the next chapter is presented all the relevant content wished by the client as well as by the staff.

| COMPANY'S THOUGHTS AND FEELINGS FOCUSED ON CUSTOMER-CENTRICITY (B) | |
|---|---|
| We should discover what is added value to the client | |
| Client is invited to develop with us | |
| Client must be interested to use the tool | |
| Client needs time to learn the tool | |
| Testing with clients | |
| Constant feedback | |

Table 14: Customer-centricity related categories and quotes by the company (quotes in Appendix 15, B)

This section included more abstract needs related to emotions, capabilities, and non-functionalities of the client portal system. In the next phase the needs are more concrete and depict specific information, functionalities and features needed in the portal.

### 3) What kind of needs the do clients and the company have (say and do)?

The previous Empathy map "think and feel" related issues were more abstract desires, whereas the "say and do" contained concrete content ideas. In this section 3 insight of desired content and functionalities are presented (see Figure 43).

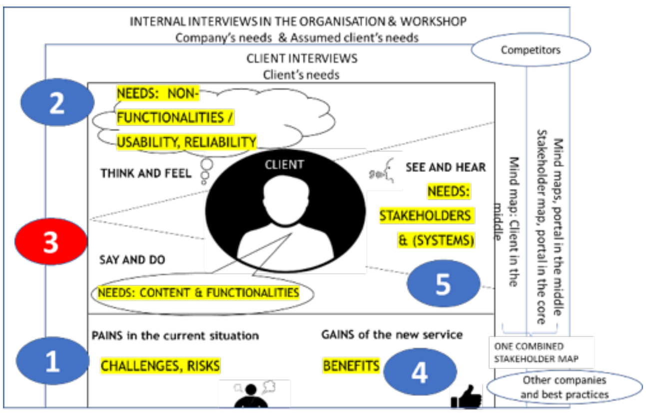



Figure 43: Third phase of results: Say and do with content and functionalities

To be able to define a minimum viable product in the Double Diamond's define phase (in Chapter 4.3), all the different ideas and wishes for the portal are presented in this section. "Say and do" is split into two main themes: content (A) and functionalities (B). Contents are discussed first.

*A) CONTENT RELATED WISHES AND NEEDS*

A quote from one internal interviewee (K) describes the scale of needs: *"[...] minutes of meetings should be one thing, annual plan—the things we are doing together with the client, different kind of metrics that we can have some kind of pic and mix metrics and build up a dashboard—that this is for you—this is what you are requesting—if it is the amount of organic raw material, or waste numbers, or if it is something else."* The content related summary of interviews is described in Table 15 below. From these ideas, some are included in the minimum viable product, and some are not.

| CATEGORY | CLIENT | COMPANY | ASSUMPTIONS |
|---|---|---|---|
| **A) CONTENT** | | | |
| **CONTACT INFORMATION from both sides and a governance structure** | Contact data with roles and responsibilities are needed. | Contact information needs to be up-to-date with a governance structure. Restaurant open hours. | Sometimes clients might not know whom to contact. |
| **ARCHIVE: Reports / Contracts & appendices / Invoices / Memos / Service level Agreements / Other documents** | An archive where all data is in one place and easy to find is needed. Reports should be according to what is agreed in the contract. Invoice timetables and upcoming invoices would be good to know. | All client related documents and development ideas should be in the portal. | This could be the place where all relevant people in the client's organisation have access to. Also invoices would be visible there. |
| **MATERIAL BANK: Bulletins & news Sales & marketing material Policies Info (e.g. prices)** | Clients' interests: Business plans, new concepts and development projects, news background information of corporate responsibility etc. | Targeted news by marketing automation. Price raise information. | |
| **FEEDBACK & SATISFACTION** | HappyOrNot results / Reclamations / Guest satisfaction reports (NPS-scores) | Satisfaction results | |
| **ADDITIONAL SALES** | | Offers & orders | |

Table 15: Content wishes from the client and the company (quotes in Appendix 16)

**Contact information**

Contact information from both parties was seen as key information to have in the portal. Both the company and the client wish to have contact information linked with the company governance structure, an organisational hierarchy structure defining responsibilities in the portal. The company assumption is that sometimes the client does not know whom to contact, which matches the client's quote that in different cases the person to contact might be someone else than you know.

**Document archive**

Another common need for the portal content was to have all the relevant documents in one place, in an archive. This would contain all memos, contracts and their appendices, service level agreements, reports, steering committee documents and for example restaurant board memos. Also, both the client and the company thought it would be handy for the client to have invoices in the archive. Overall, the archive would be a way to share important documents. It would also be a place to save ideas for later use, and a way to get back to them when needed.

**Material bank**

The material bank was an idea both the client and the company suggested. Both saw it could be the place for bulletins and news. From company's side, the marketing automation system could do this. For the client, it would be a place to get information of new concepts and development projects, those which are relevant to them. Also, this would be a place for the clients with a maintenance fee contract to get suppliers policy information to support their restaurant's functions and decision making for example concerning used raw materials and waste management.

Clients gave more ideas for the material bank than the company. They suggested the material bank to have floor plans, logos, staff presentation as well as lunch and catering lists. There seemed to be a need to have material, such as ideas, pictures, and information for organizing events. For example, pictures of catering list products were seen valuable. The company saw that the portal could contain price information. Another client's idea was to manage facility and equipment maintenance through the portal. They were interested in estimating the lifecycle of equipment to budget costs.

**Sales material (Company)**

The staff presented also an idea of using the portal as a sales material bank, through which the sales managers and account managers could send offer related material. An idea emerged to use the portal for suggesting solutions for current clients, and even package offers of different concept modules. Expertise in nutrition and interior design could be offered through the portal, maybe through a chat service. There was also an idea of taking a possible fee from clients for extra features.

**Feedback (Client)**

Clients wanted to have guest satisfaction results, such as HappyOrNot-results, directly in the portal, to understand their guests better, and to react if needed. Developing the service was important to them. They would like to be able to follow feedback related actions and guest comments. From the company's perspective, feedback came up only as a suggestion to add the guest satisfaction results to the portal.

*WISHED FUNCTIONALITIES*

Second part of the empathy map's category "say and do" are the functionalities (B) desired by the clients and the staff. These will be discussed next (see Table 16 below).

| CATEGORY | CLIENT | COMPANY | ASSUMP-TIONS |
|---|---|---|---|
| **B) FUNCTIONAL FEATURES** | | | |
| **MOBILE** | Mobile use is the current trend. | "Mobile first" and responsive is necessary. | |
| **DASHBOARD** | Possibility to see graphs and KPIs rolling. | Contracts define dashboard KPIs: quality, sales, customer satisfaction etc. | What matters is the quality of food and service. |
| **AUTOMATED REPORTS** | Automatically updated if needed to the client's system. | Management fee reports should be automated. | |
| **SETTING TIME FRAMES** | Being able to set timeframes in reports is important. | | |
| **RESTAURANT ANNUAL CYCLE** | Annual cycle will keep the client up-to-date.<br>Themes /events / special dates / holiday season | | |
| **CLIENT RELATIONSHIP ANNUAL CYCLE** | A client relationship annual plan would keep track on development issues. | Following and updating development projects would be easier. | |
| **BRAINSTORMING PLATFORM** | Ideating together is wished. | This could be an ideating tool. | |
| **CATERING ORDER SYSTEM** | Integrating catering order system into the portal is wished. | Catering orders could also be in the portal. | |
| **ACTION LOG, REQUESTS & TICKETING: Feedback / Maintenance & repair** | Receiving a notification that the message is received is needed. | Ticketing would help in knowing what the client wants. | |
| **NOTIFICATIONS, REMINDERS** | Updates could be notified to the email. | Updates could be notified to the email. | |
| **SSO** | Single sign-on would make access fast. | Single sign-on is needed. | |
| **SEARCH FUNCTION** | Good search functionality is needed. | | |
| **OWN PROFILES** | Client profile could be the place to define what information is wanted. | | |
| **RESTAURANT SPECIFIC VIEW** | Restaurants should have their restaurant specific view in the portal. | | |
| **UPLOADING & DOWNLOADING DOCUMENTS** | Importing and exporting documents should be possible. | | |
| **OFFER CREATION** | | A place to make simple offers. | |
| **DEMO ENVIRONMENT** | | A demo system. | |
| **PROJECT MANAGEMENT TOOL** | | A project management tool with phases, tasks & responsibilities. | |
| ***FUNCTIONAL FEATURES: COMMUNICATION*** | | | |
| **SAVED DIALOGUE** | Saved dialogue would enable anyone with access to follow up the conversation. | Dialogue stays in one place for all to follow. | |
| **COMMENT FIELDS** | Commenting helps to later understand the situation. | Commenting on reports is valuable. | |
| **EMAILS & MASS MESSAGES** | | Emails could be connected to the CRM. | |
| **CHAT** | Yammer-type chat would a nice way to keep in touch. | Chat functionality would be good. | |
| **LOG OF SENT MESSAGES** | A log of message receivers is wished. | | |
| **FEEDBACK CHANNEL** | Client contact person should receive the guest satisfaction results and how feedback is processed. | | |

Table 16: Wished functionalities by the client and the company (quotes in Appendix 17)

**Dashboard**

Dashboard was a wish from both sides. With dashboards, everyone could get a good picture of the situation with one view. The front-page dashboard would contain KPI charts for easy follow-up. The maintenance fee clients were interested in seeing the cost development KPIs, whereas own risk restaurants wanted to see, for example, the number of guests.

**Automated reports and setting time frames**

This dashboard would also offer access to automated reports, which was a wish from both parties. Clients also wished to be able to set time frames in automated reports and dashboard KPI reports. The report content depends on the agreement. According to finance department, the automation is easier to create for management fee contract related reports, than for own risk reports. Management fee reports are standard reports, such as a monthly transaction report, like all the clients with a management fee contract. Own risk reports are tailored to fit different needs, which make their automation a challenge.

**Annual Cycles**

**Restaurant Cycle:** Clients wished to see the restaurant themes and all the upcoming events in an annual cycle.

**Annual Client Cycle:** Both client and the staff hoped to have an annual cycle, kind of a development road map. This cycle would contain the upcoming meetings, enable reminders as well as follow-up. The account development platform would act as a place to document development steps from the ideation platform. There could be an action log for the ideas and their status.

**Communication related functionalities**

A common denominator for these functionalities was shared dialogue. Different ideas were mentioned, such as chat and mass messaging functionalities. Ability to comment reports was seen a key criterion and a need to see the history of conversations and comments was important. This was, for example, the way the account manager could see the conversations between the client and the restaurant manager.

**Other functionalities**

Both parties were interested in having an **action log** and **ticketing** functionality in the portal, as well as the possibility of receiving notifications. Clients wanted to be able to follow the actions taken after receiving feedback. Also, an idea of using ticketing in maintenance came up. Both parties wished for a **single sign-on** functionality. Clients also wished for a good **search functionality**. They wanted to have **own profiles** and wished for a **restaurant specific** view. They hoped that uploading and downloading documents to the archive system and material bank would be possible. Integration to the **catering order system** was wished by both parties, as well as a **common brainstorming platform.**

Internal workshop participants had an idea of using the portal for **offer** creation and reference material. They suggested the creation of **demo** accounts for sales purposes. Another internal idea was to have a project management tool in the portal, as it could be useful for projects such as restaurant openings, and for defining tasks and responsibilities.

In this section content related needs and the desired functionalities were discussed. The next section focuses on benefits and gains. It is the part four in the empathy map.

**4) What are the benefits of the possible portal (Gains)?**

Several ideas of the possible benefits of the portal came up during the interviews and the workshop. Most of the benefits were related to both: clients and the company. This section describes all the benefits and gains the clients and company desire to achieve by using the portal (Figure 44 and Table 18).

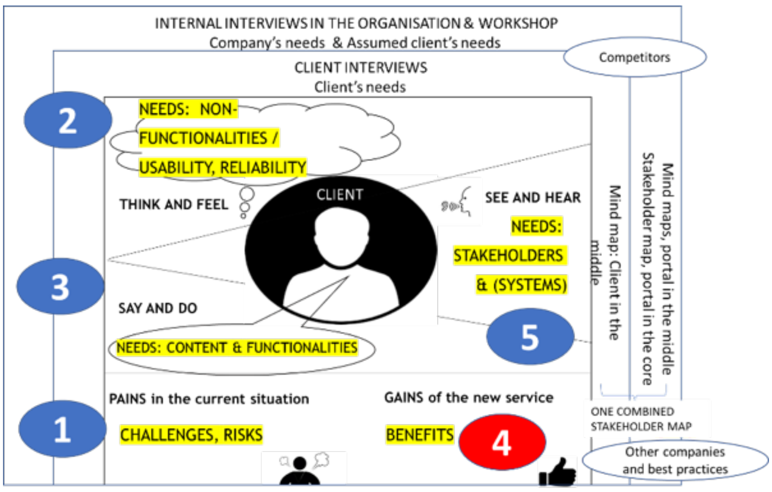


Figure 44: Benefits and gains desired by clients and company

**Everything in one place and possibility to use the same data simultaneously**

The archive functionality would give the company and the client a possibility to **see the same document, the same time, in the same place and share it to others**. The company also saw these beneficial for clients. The clients saw this would be a handy place to quickly check the current situation and have everything in a compact place.

| CATEGORY | CLIENT | COMPANY | ASSUMPTIONS |
|---|---|---|---|
| **BENEFITS** | | | |
| **ADDED EFFICIENCY IN DAILY ROUTINES** | | | |
| **All client data is in one place easy to find for every-one to keep in track** | Having all data in one place up-to-date, also the earlier versions, is a benefit. Every-one would stay tuned and handle less emails. | Having all project mem-bers in the portal would help in managing pro-jects. | Clients would not have to archive that much any-more. |
| **Same version of the document is al-ways available** | There would be no misunder-standings of document ver-sions. | Less emails and always the same documents on both sides. | Clients would always know which is the latest version of the document. |
| **Time savings: shared dia-logue, less emails, less archiving** | Eases and expedites work. | Saves time. Less manual work. In staff changes in-formation is transferable. | |
| **Automation e.g. less manual work** | | More digital - Less man-ual. Benefits in operations and finance. | |
| **Accessibility to data 24/7** | Possibility to access when needed. | | Clients are not depend-ent on our availability. |
| **A compact place to make a quick view of the situa-tion** | Everything needed related to the restaurant and the pro-vider would be in the portal. | | |
| **Helps client's daily work** | Eases client's daily life. | | What matters to clients is what the portal should contain. |
| **CRM used more efficiently** | | Data accuracy could moti-vate in using the CRM. | |
| **ADDED EFFICIENCY IN COMMUNICATION** | | | |
| **Easier to keep track** | Keeping track on what's going on. An annual clock with yearly plan is needed. | All parties would be able to keep track on the cli-ent dialogue. | Possibility to follow de-velopment processes. |
| **Easier to follow client di-alogue and decisions** | Seeing the dialogue history would help in remembering decisions later. Also to whom the messages have been sent. | It's better to know too much about the client re-lationship and decisions than too little. | Constant interactive dia-logue makes it faster for the clients to give feed-back. |
| **Simultaneous dialogue with all parties** | It is a good thing to have sim-ultaneous access for all par-ties. | Everyone can follow the dialogue. The possibility of giving feedback would be efficient too. | |
| **Easier to know whom to contact** | Knowing whom to contact and in which issues. | Less fetching for contact details. | |
| **Easier to share infor-mation, e.g., when peo-ple change** | Easy to transfer information in cases, e.g., when people suddenly change workplaces. | Important data would be accessible even if people change. | Important data would be accessible to clients even if people change. |
| **ACTS AS A TESTIMONIAL OF OUR COMPENTENCE** | | | |
| **Transparency: Showing that prom-ises are kept / Abil-ity to prove perfor-mance by KPIs** | Possibility to see how KPI's develop. | Portal would be a way to proof that KPIs are in an agreed level. | Clients can see that what they are paying is what they get as well as that they can trust us. |
| **New concepts, develop-ment and renewal** | Possibility to see what new is coming up. | Portal could have infor-mation that is not on the website. | |
| **FINANCIAL BENEFITS** | | | |
| **Better prediction and budgeting** | Ability to see KPIs on a dash-board enables to react quickly if needed. This is a win-win tool and eases predicting and estimating. | | |
| **Focus workhours and resources to key tasks by, e.g., automation** | | Portal would save account manager's time. | |
| **Added sales - a channel to target current clients / sectors** | | Portal could be a sales channel. | |
| **Using data as reference and demo can add new sales** | | This could be used in demo and reference cases. | |
| **Competitive edge against small companies** | | A competitive edge. | |
| **Increasing satisfaction & retention rate** | | This can lead to strong client loyalty and satisfac-tion, and act as a loyalty system. | This is a possibility to of-fer added value to the client. |

Table 17: Gains perceived by clients and company (quotes in Appendix 18)

**Efficiency in many ways**

People see that the portal would bring efficiency. More time can be used in face-to-face communication. Clients and company both saw the portal could **save time,** as the amount of emails, searching the right document and archiving them would be minimised. Sharing information and having a common dialogue would also make things more efficient and save time, which could be used in meeting the clients. According to the client and the company, various benefits would ease client's daily work. **The possibility to access data whenever needed** would also safe time, as there would be no need to ask for KPI reports, as they would be updated directly to the dashboard. The company also saw this as a great benefit to the client. Also, the amount **of manual work would be minimised, and time saved** if, e.g., uploading the management fee monthly transaction reports from the business intelligent system could be automated. Also having Excel sheets uploaded in the portal would save the time, as commenting could still be done in the reports without sending emails. Another efficiency related benefit would be the portals impact on CRM data, as some data could be reflected from the CRM and made visible to the client. This would increase the motivation inside the organisation to keep data accurate and valid, which implies to other systems as well.

**Transparency and enhanced communication**

First, the portal would create transparency, as agreed decisions, common documents, reports, and conversations would be visible for all people with given access rights. This would be useful for both parties also when people change. Everyone could keep on track, prepare for upcoming events, and follow the discussion. Clients could, for example, send the same information both to the restaurant manager and the account manager. The saved conversation history, reminders and annual cycle would also prevent forgetting important issues. To save time, clients want a direct and common communication channel for all the relevant parties and the possibility to see whether, and to whom, important messages have been sent. In addition, both parties brought up that having constantly updated contact details in the portal is important. The company thought that all the above-mentioned benefits would be important to the clients.

**Testimonial support**

The portal can act as a **testimonial tool** in proving that the contract and service level agreement criteria are fulfilled. This can be done by reporting KPIs and by using the action log functionality. The data in the portal can help in investment and budgeting decisions as well as in predicting.

Clients saw that knowing **company's new concepts and renewals** would be useful to them. For the company, the portal could be the tool to testify that these new concepts are arriving, and constant renewing is happening. The portal would enable targeting clients with segment related information which is not on the public website.

**Financial benefits**

Clients saw portal could enable faster reaction, in case KPIs are going to an unwanted direction. It would also enable faster communication. They described that it would be a solution where everyone benefits, as, for example, when waste amount KPIs could be more controlled, prediction of waste fluctuations would save money. Both would benefit from predicting the equipment lifecycle as well, as it would minimize maintenance costs and cost occurring from broken equipment. All these have indirect financial impact. Indirect financial benefits would be also the saved workhours from the manual work transformed to automated reports and less email buzz. In the company, work could be focused on core tasks which cannot be done by any system, especially the face-to-face communication with the client. Other **financial benefits** could be added sales by triggering the clients, e.g., with new concept ideas by marketing automation. The portal could also be used for reference purposes and to even create new sales.

**Increased satisfaction**

The interviewers and workshop participants described how all this could increase client loyalty and satisfaction and act as a strong competitive edge. For the company, this would mean longer client relationships and a higher retention rate.

This Chapter 4.2.5 started by presenting the challenges described by clients and staff. Needs from various perspectives, feelings, and concrete content wishes, non-functional and functional, have been presented. As all these are partly related to each other, some answers were overlapping. Benefits were discussed above. The next section 5 describes the users and stakeholders described by clients and staff, before moving into the Chapter 4.3 “Defining the minimum viable product”.

**5) Users and stakeholders linked to the portal (see and hear)**

Empathy map’s “see and hear” part (See Figure 45) consists of the stakeholders and systems which affect the client, and which might need access to the portal. After creating the several mind maps (Appendices 7-8) and the final mind map (see Appendix 9), a holistic picture of all the necessary stakeholders and systems was formed. The main part of the final mind map was the client’s company and systems, and the other was Fazer Food Services and its systems. The goal was to find out who and which systems influence the company and the client.

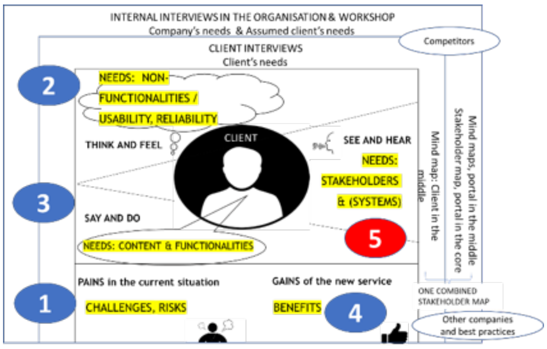



Figure 45: Empathy map's "see and hear" part

The key users in the company are the operations (e.g., account managers and restaurant managers). The client's key user is the contract contact person. Both sides have the usual company functions behind them: marketing, procurement, ICT, communications, finance, HR etc. They send data to directors, steering committees, HR, and finance. In business parks the owners need data, and in large corporations a facility manager might be the one taking care of the equipment maintenance process and interested in receiving maintenance reports. Clients mentioned that they also have special teams, such as a sustainability team, that they'd like to share data with. One common forum for the client and the company was the restaurant development board, which could get limited access to, e.g., satisfaction reports, certain KPIs, and memos in the portal.

**Client relationship related documents**

Some clients kept the data to themselves, but some shared it with several people and departments in their organisation, such as: finance, secretaries, supervisor, substitute, other public officials, and HR, which was interested of, e.g., guest feedback results. Sustainability issues were sent to the sustainability team and local contact persons. Maintenance managers were interested in maintenance reports. The contract contact persons might have assistants and people, for example, in HR, who need a limited access to the portal. Clients also proposed that the work safety officials could get access to certain data.

**Archiving documents received from the operator**

Some clients use group chat service Yammer for communication as well as SharePoint for sharing documents. Some clients save documents to document management systems and some have, e.g., contract management systems. Both parties use, in their daily work, systems related to account data, emails, contract management, business intelligent, document management etc. In many cases the client uploads the documents received in the emails to their own archives. One client had its own portal.

**Other stakeholders**
The portal is also linked to other business units, Nordic countries, and the Fazer Group in whole. It has to be made scalable in order to implement it elsewhere. Also, other stakeholders that influence the company are the public officials, as well as law and regulations. Both might have partners and subcontractors that demand for example certain KPIs.

**Main users**
According to the mind maps done during the interviews and the stakeholder map in Figure 34 (page 79), conclusions of the users can be done. Main users are the account managers, client contact persons and the restaurant managers. The portal super users and maintenance team have also a close connection to the portal direct. Also, key persons in the client's departments such as HR, key persons in the municipality sector, estate owners and other people who need certain reports might need a direct access to the portal. The company's departments such as operations, accounting and sales need to be able to see data related to certain KPIs as well as reports and sales for, e.g., reference and demo purposes.

Other systems are linked to the portal and these connections are depicted in the expressive service blueprints and data flow later in Chapters 4.4 and 4.5. It was mentioned, that stakeholders outside the outermost circle such as media, trends, prospects, and the political situation influence what clients see and hear. Partners, vendors, and outsourcing have an impact on both parties and can indirectly influence the needed KPIs and reports as well. Also, Fazer Group and other business units might have an indirect influence, or even impact the portal content in a larger scale, in case there are common development interests.

This was the last part of analysing interview and workshop results. Both the company and the clients had a lot of ideas. Considering the assumptions the company had of the client's needs, they had not understood the importance of feedback and its follow-up to the clients. Otherwise they seemed to have a relatively good idea of the client's basic needs. The next step is to prioritise the features and functionalities to the portal concept. This is done in the next chapter.

## 4.3 Defining the minimum viable product

This chapter presents the empirical part of define phase of the Double Diamond process (in Figure 46). The goal in the define phase is to prioritise the different wishes presented by clients and staff in the earlier interviews and the first internal workshop, and to narrow multiple ideas from the discover phase into a minimum viable product. To be able to do this, a workshop was held together with the staff with expertise in the subject.

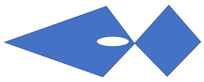


Figure 46: The Define phase

The second workshop held on the 13th of October 2017 had 9 participants and took 2 hours. The invitation was sent to people mainly in a decision-making role. The project manager, located in Norway, helped by inviting the participants and by giving valuable feedback of the workshop plan by Skype. The workshop plan (see Appendix 13) was planned mainly by the thesis writer, who also facilitated it. The tools used during the second workshop were: MeWeUs, jobs-to-be-done, voting and customer experience business value matrix.

**Workshop preparations**

Interview quotes were used in transferring insight from the discover phase to the participants in the second workshop. The interview quotes from clients' and internal interviews were analysed beforehand by the thesis writer and grouped by main challenges (pains). In the morning before the workshop, all quotes were printed and attached on the meeting room wall under categories, which also had a layer for internal organisational expert quotes and client's quotes. Every challenge had its own designated colour to help the participants separate challenges from each other (Figure 47). One big wall was filled with A4 papers with approximately one quote per paper.


Figure 47: Quotes presented in the workshop

Quotes were layered on the wall in the following way:

Challenge 1

- Client quote
- Organisational quote (marked with a house symbol)
- Our thought of client's challenge (marked with a house and an eyeglass symbol)

Benefits (all marked with a smiley face symbol)

- Client quote
- Organisational quote (marked with a house symbol)
- Our thought of client's benefit (marked with a house and an eyeglass symbols)

Preparations for prioritising content and features for portal was done by using needs derived from interviews and the first workshop. All main features were listed down. Examples of jobs-to-be-done phrases were printed, and an empty canvas for the jobs-to-be-done with the list of features was printed for each group. The plan was to divide the number of features by the number of groups. This was challenging, as the amount of workshop participants signed up to the workshop varied from 4 to 15 people. Therefore, how the groups should be divided was left open and decided during the workshop. The client's wishes for portal features from the premade list were written down on sticky notes and attached on the jobs-to-be-done canvas paper on the wall. Another big sheet of paper on the wall was the customer experience business value matrix. The workshop was ready to start.

As some of the participants were not in the first workshop, it was relevant to start with an introduction, followed by a more in-depth discussion of the importance of the portal as a part of the company's account management framework. After the introduction phase, the workshop goal was clarified, and the earlier phases of the concept project as well as the tools to be used in the second workshop were presented. Next, the participants were asked to read the interview quotes put on the meeting room wall (Figure 48). They were given 15 minutes of silent time to walk around the room and write down their thoughts on a leaflet. This was followed up by a discussion and a break.

Figure 48: Workshop participants reading quotes

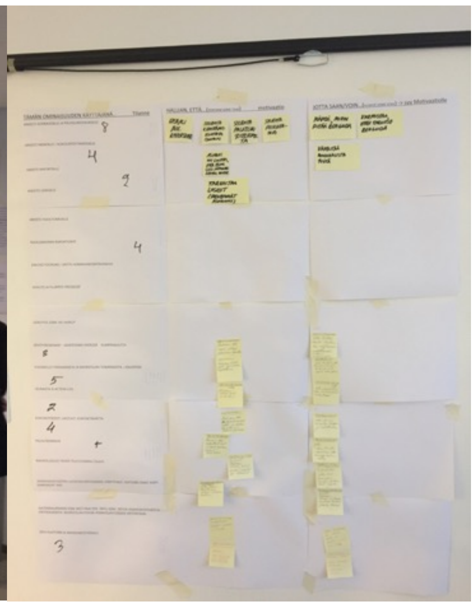


Figure 49: Jobs-to-be-done

After reading the quotes, the participants were grouped into two groups and the list of portal features was split into two. It was known that two participants had to leave earlier, so the composition of having two groups fitted best the purpose of the task. The group members were asked to think and write silently their own suggestions for the jobs-to-be-done, which was followed by a discussion in the group and filling the empty canvas on the table. The two groups almost made through all the features, as they combined some of the features. Unfortunately, not all features were totally covered, such as the communication related topics. Next, the groups moved the sticky notes from the small template on the table to the big template on the wall (see Figure 49) and presented them to the others. The translated jobs-to-be-done canvas is in Appendix 20. This was followed by voting the features on the jobs-to-be-done canvas. Every participant was given six sticky notes, which they could use to vote their options. They had altogether 6 votes to use. After voting, the sticky notes were calculated.

Voting was followed by quickly writing the features on new sticky notes, which in very fast pace were placed one by one by the participants on the customer experience business value matrix (Figure 50) while discussing their position. The last part of the prioritising part was to define which features are most valuable in the matrix, and a circle was drawn around this area.

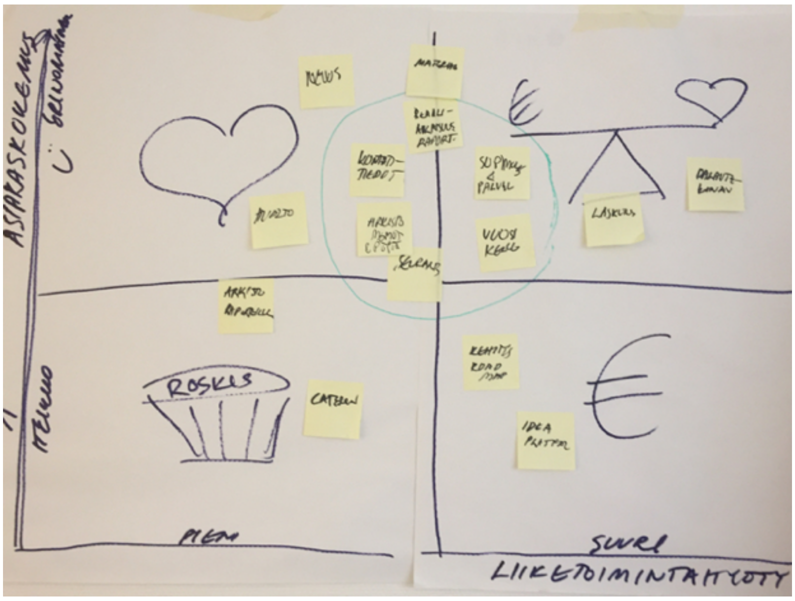


Figure 50: First MVP (the surrounded area) in the customer experience business value matrix

The workshop participants prioritized the following features and functionalities (Figure 50): contact information, communication dialogue functionalities (comment field, chat, Yammer), annual cycles for both restaurant related topics as well as client relationship related topics, action log functionality, KPI dashboard with real time reports, and last, the client specific material, e.g., best practises in the restaurant. An updated MVP can be seen in Figure 51. Invoicing (11) and catering orders were left out of the scope, as they had an already functioning system that could be later integrated to the client portal if wanted. Also, the maintenance related features were not ranked high in customer experience or business benefit. Idea platform and development road map (10) were seen as nice features, but not necessary in the beginning. News (9) were considered to be important but not crucial. These were added to the road map. It is good to mention here that during the workshop time was running out and a deep analysis was not possible. For example, for some reason the archive of client relationship related documents was not included in the circle even though it was discussed so. The workshop timetable was quite tight, which was probably the reason the communication channel related issues were also not discussed by the group and added to the jobs-to-be-done canvas. These were later iterated within the project group and added to the MVP. The workshop ended by a short brief of the results and the next steps to be taken.

**Iteration phase**

After the workshop, the minimum viable product (see Figure 50) was presented to the commercial heads in the company by the project manager. Following their suggestion, the MVP was expanded to include the feedback channel functionality, as it was one of the client's main challenges. Also, the communication channel and the archive for reports was lifted in the MVP as they were strongly related to client's current challenges.

The suggestion for the MVP is in the red circle (see Figure 51), and the order is an initial suggestion for a road map. Text in grey is not included in the minimum viable product. This minimum viable product is the basis in the next phase, the define phase, which is the third phase of the empirical study before going into the last phase.

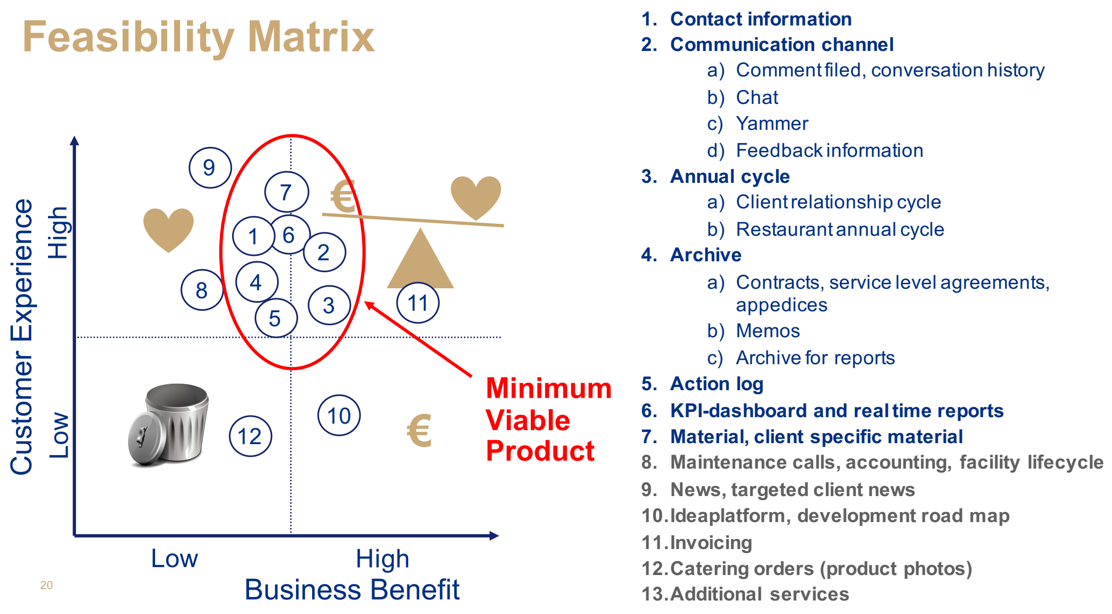



Figure 51: Minimum viable product for the concept

## 4.4 Developing the concept to meet technical challenges

The developing phase was the third phase in the Double Diamond service design model (see Figure 52). This is strongly linked to the deliver phase, as both describe the journey of actions inside the system. Before the workshop an initial data flow was created describing the connections and integrations around the portal. The goal of this workshop was to fine-tune the initial portal data flow. The stakeholder map, mind maps and quotes from interviews were all analysed by the thesis writer in creating a big picture of the data flow and its needs, such as integrations, systems, users and KPI sources. This meant learning which KPI metrics are necessary for the customers and promised to them in the contracts, and which system offer that data.

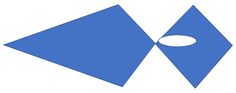


Figure 52: The develop phase

As the portal absorbs various KPIs, it was important to understand from which systems they derive. Therefore, an initial list of KPIs and reports was created based on the client's and organisation's KPI wishes, which are partly the same as agreed in the contracts. Also, other KPI sources from the organisation were used, such as the governmental institution's framework agreement KPI requirements and the company's KPI documents. These KPI sources were also added to the data flow before the workshop. The KPIs used in the company are confidential data and not presented in this thesis. The Table 18 presents the KPIs the clients mentioned in the interviews during the discover phase. The source system is not public information.

| Topic | KPI | Source | Idea / request came from |
|---|---|---|---|
| Sales | Sales per month | System x | Customer interviews |
| Sales | Price per meal | System x | Customer interviews |
| Sales | Hospitality (catering) sales | System x | Customer interviews |
| Sales | Utilization rate of the restaurant | System x | Customer interviews |
| Sales | Transactions | System x | Customer interviews |
| Sales | Changes and deviations in the number of customers | System x | Customer interviews |
| Finance | Revenue | System x | Customer interviews |
| Costs | Cost per serving | System x | Customer interviews |
| Costs | Raw material costs per serving | System x | Customer interviews |
| Purchase | Procurement | System x | Customer interviews |
| Purchase | Rate of domestic food | System x | Customer interviews |
| Purchase | Rates of organic food | System x | Customer interviews |
| Quality | Customer satisfaction reports | System x | Customer interviews |
| Quality | Waste: Production and service waste % of all production + in grams | System x | Customer interviews |
| Quality | Health official reports | System x | Customer interviews |
| Finance | Equipment investments | System x | Customer interviews |
| Other | Time of queueing | System x | Customer interviews |
| Other | Wellbeing | System x | Customer interviews |
| Other | Usage rates of meeting rooms | System x | Customer interviews |

Table 18: Customers' KPI wishes

The last workshop was held on the 10th of November. The workshop agenda and plan are in Appendix 21. Altogether 14 people from the company participated in the workshop which lasted 3 hours. The project manager and the thesis writer jointly led the workshop. Participants in this workshop represented different roles from the whole group ICT, system expertise and accounting. The workshop began with introducing the facilitators and presenting results from previous phases. Describing customers' needs and challenges was important before going into technical solutions, as these solutions should solve these client's challenges. This third workshop resembled more a traditional group work. The first task given to participants was to analyse the initial data flow for 15 minutes and to share opinions. The second step was to link the source systems with features and other content, discuss the needed integrations and gaps in the current data flow and last, discuss possible platforms and challenges.

The initial data flow used in the workshop cannot be presented in this study for its confidential content. The idea in the data flow was to connect functionalities and main contents of the portal one by one to their source system during the discussion.

The initial data flow was used as a first prototype following designer's advice that prototypes are not service pilots, but rather quick drafts to just to get a quick feedback about whether the design process is going to the right direction or not, so that iterative steps can be done in time (Davies & Wilson n.d., 20; Meroni & Sangiorgi 2011, 265). The workshop was an important mile stone in knowing what is possible now, what is possible later on, and what should be abandoned. The participants commented that the arrow directions are not necessary in the data flow, and that there is a cloud system which should be added to the data flow. Various issues were discussed but as no clear solution could be agreed, these were set aside for later decisions. There was, for example, a discussion over the role of CRM and other systems. The workshop ended to a discussion that some functionalities and features already exist in the company's current systems and some are still unsolved. Nevertheless, due to changes in other systems the ICT workshop participants suggested to create a dataflow containing less systems as the system platform is transforming and therefore the source systems cannot be decided at this point.

Week after the workshop, the data flow was further iterated and answers to the open questions were discussed in a smaller Skype-meeting together with some participants from the workshop. After this, the data flow was finalised (Figure 53). The top row describes access points to the portal. The middle row contains all the functional needs defined in the minimum viable product. The last row connects all necessary systems to the MVP functionalities. The CRM and Business Intelligence Solutions (BI) are the main sources. CRM is the source for the annual cycle (checking what is happening and when), contact data and documents. It can be also connected to contracts and customer service solution, which provides the action log and commenting functionalities. BI solutions system is the source for reports and KPIs, providing data to the dashboard. Marketing automation targets clients with client specific information. Archiving documents and materials is connected to the document and invoice management systems. Ideation platform provides the forum for common ideas.

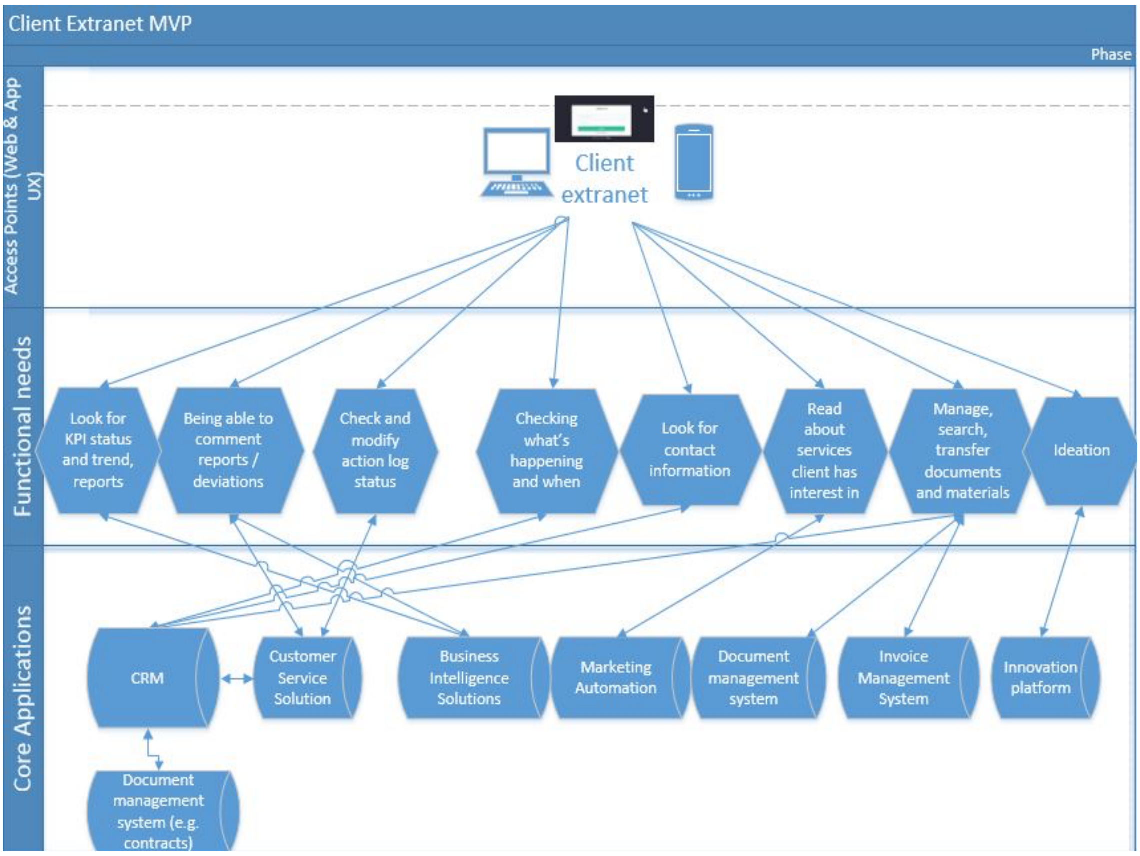



Figure 53: Final data flow

During this discussion, a wish for a descriptive service blueprint instead of a clickable "app" prototype was brought up to describe the user journey. Before this, the thesis writer pondered between whether to create mobile app prototypes or service blueprints, and as the ones who should take the concept into action wished for the service blueprints, their wishes were heard. These service blueprints are presented in the next chapter.

### 4.5 Delivering concept

This chapter describes the client portal service prototype and is the last phase in the service design process (Figure 54). As Schneider and Stickdorn (2010, 132-133) state, prototypes are used to visualize and describe the service in a more concrete format, in order to be able to test the service and gather feedback. Following their suggestions, prototypes in service design should express user's emotions and therefore expressive blueprints were used as prototypes in this study to describe the multilevel structure of the portal service and to express client's feelings and perceived benefits.

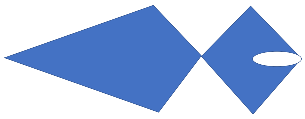


Figure 54: The delivery phase

According to Spraragen (in Meroni & Sangiorgi 2011, 256), expressive blueprints fit well to the realm of empathic service design tool, as expressiveness manifests in "notations that capture the customer's emotional responses". Service blueprints are usually constructed in collaboration with key stakeholders and people from different departments, with different knowledge (Meroni & Sangiorgi 2011, 257; Stickdorn and Schneider 2010, 204-205). According to Schneider and Stickdorn, this strengthens team spirit and promotes co-operation. The blueprints in this study were created together with the project manager.

Expressive blueprints were created separately for all the functional needs to prototype the concept, so that when the system project starts, a ready-made idea of the client's steps in the system and its logic exists. In this last empirical chapter, we present two expressive service blueprints to show the main idea of the prototype. Appendix 22 contains the 8 remaining expressive services blueprints.

The first example in Figure 55 is about checking the KPI status. After the user logs into the portal from the login page, she can see the dashboard with different KPIs. At the same time the system searches real time data from the raw material purchase data and updates it through the Business Intelligence solution to the dashboard. The benefits for the client would be, e.g., to have fast access to KPIs and to be able to measure and predict. This applies to the provider as well. The provider could also benefit, by being able to prove that what is promised in contracts can be proven by showing KPIs.

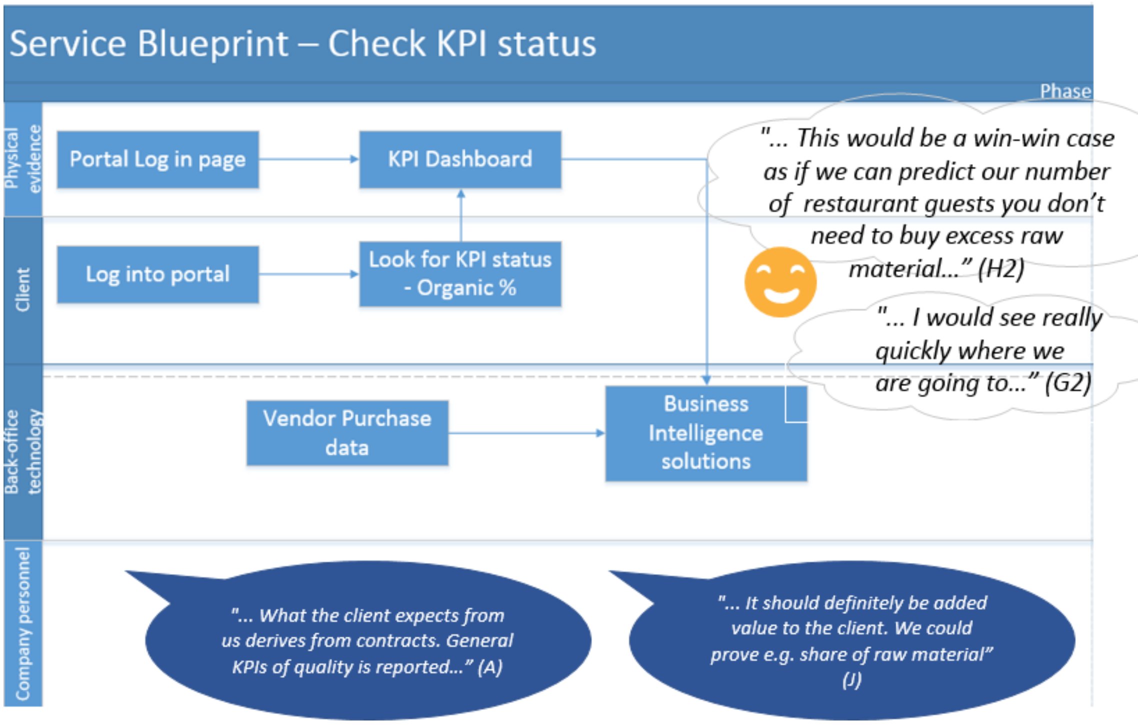



Figure 55: Checking the KPI status

The second example in Figure 56 is about comment fields. In case the client wants to see the comments on deviations, she can access the system through the login page. Comments are visible on the dashboard, and everyone can comment back using the dashboard comment field. This data is updated real time into the business intelligence solution.

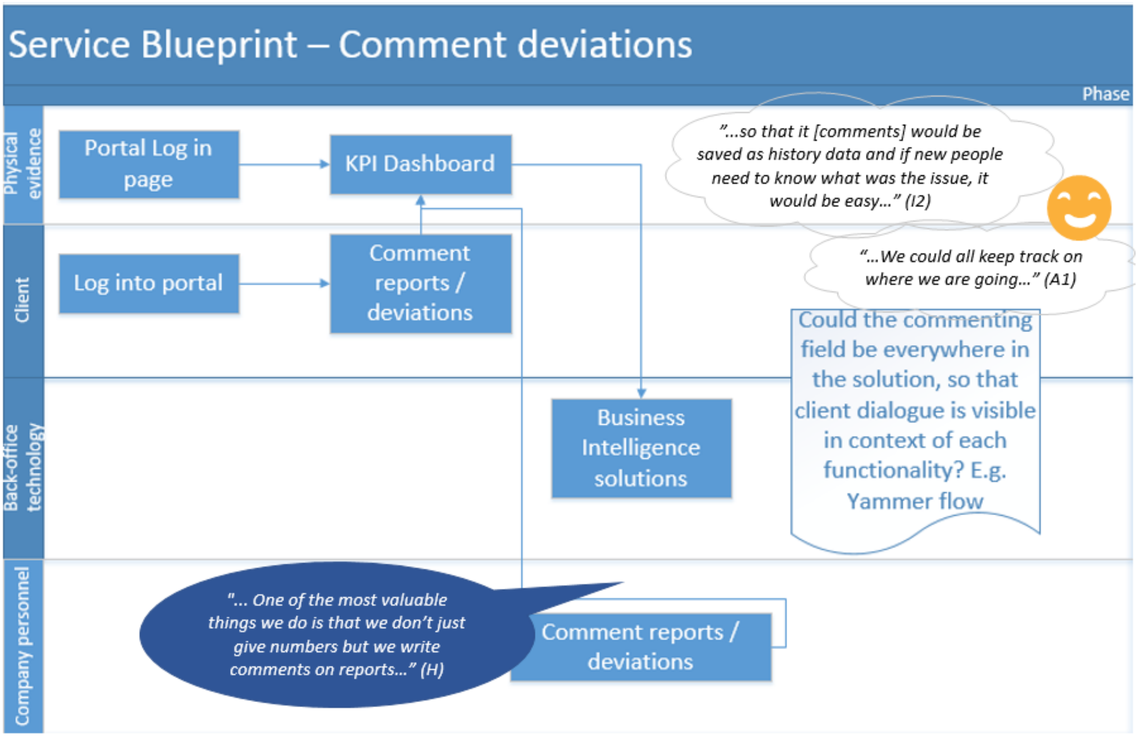



Figure 56: Commenting deviations

The expressive blueprints can be used to prototype the client portal concept. Yet, as the goal of this study is to create a concept, a holistic description of the concept is presented in the next chapter of study findings, Chapter 5, together with results of the study.

# 5 Findings and conclusions of the case study

The objective of this study was to create a customer-centric client portal concept for the business-to-business client relationship management in Fazer Food Services. The concept should serve as a common surface between the client and the supplier (see the overlapping area in Figure 57). What it could be was not decided, as the wish was to create new ideas, innovate, and most important, leave open space for service design.

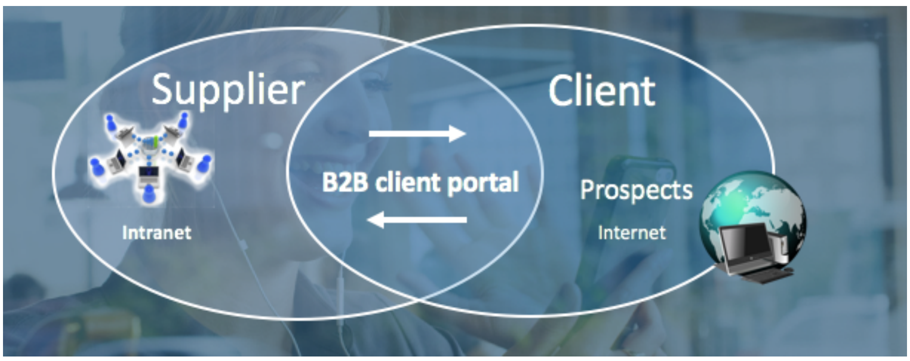



Figure 57: B2B client portal

This chapter reflects the previous chapter's findings and turns them into conclusions. Before going through every research and development question separately the main question **"customer-centricity— how can it be used in building a digital business-to-business client relationship tool?"** is addressed through the theoretical background.

## 5.1 Developing the theoretical framework

During the empirical part, the theories discussed in Chapter 2 could be seen in a deeper context, which led to a development of a new theoretical framework (Figure 58): a suggestion for a framework for building a customer centric B2B client relationship digital tool. The ideal goal of creating a portal system would be for it to link the clients and provider more closely together into an interdependent relationship, according to Woodburn and McDonald's (2011, 54) client relationship phases discussed in Chapter 2.1, and this way increase retention. Ability to use Big Data is relevant, and according to Payne and Frow (2005), expanding the current system should be done without disrupting business operations.

Grönroos (2015, 134) emphasizes how companies should focus on all their strategies in how to make customer relationships last and influence in positive word of mouth. He sees that client relationships are for keeping promises and fulfilling them (2007, 454-457). Service design addressed in Chapter 2.4 is the main method placed in the joint sphere. The spheres were presented by Grönroos and Voima (2013, 141) in Chapter 2.3. Understanding the client's life is the basis in service design and in Customer-dominant logic (Heinonen and Strandvik 2015). Therefore, both the client's as well as the company's internal client's goals, tasks, activities, other people's experiences, earlier experiences, existing information, and the way things are communicated, are taken into account, according to the factors influencing the formation of customer value-in-use, defined by Heinonen and Strandvik (2015). In this study, service design methods, process and tools are used in stepping into the client's shoes, and a minimum viable concept is created. As service design in this portal creation concept contains workshops internally and probably later in the future with the clients, co-creation together with the client is seen important. Sanders (2008) defines, that in co-creation, all the people participating in the design process work collaboratively together, also the users, even when they are not the professional designers. This is how we see it in this study as well—collaboration during the whole service design process in the joint sphere.

There seems to be a gap in the current account management scientific literature, as only a few portal solution related articles and books came up when the theoretical part was written. CRM related literature was found. What kind of conclusion can be made? Is the customer-centric still a rather new approach in the client related data management, as literature and tools related to account management have been strongly company-driven? Examples of this (e.g., Portfolio management) were presented in Chapter 2.1, when discussing the evolution of client relationship management. As a conclusion of this, it is suggested that further research could focus on the field of client relationship management from the client's perspective.

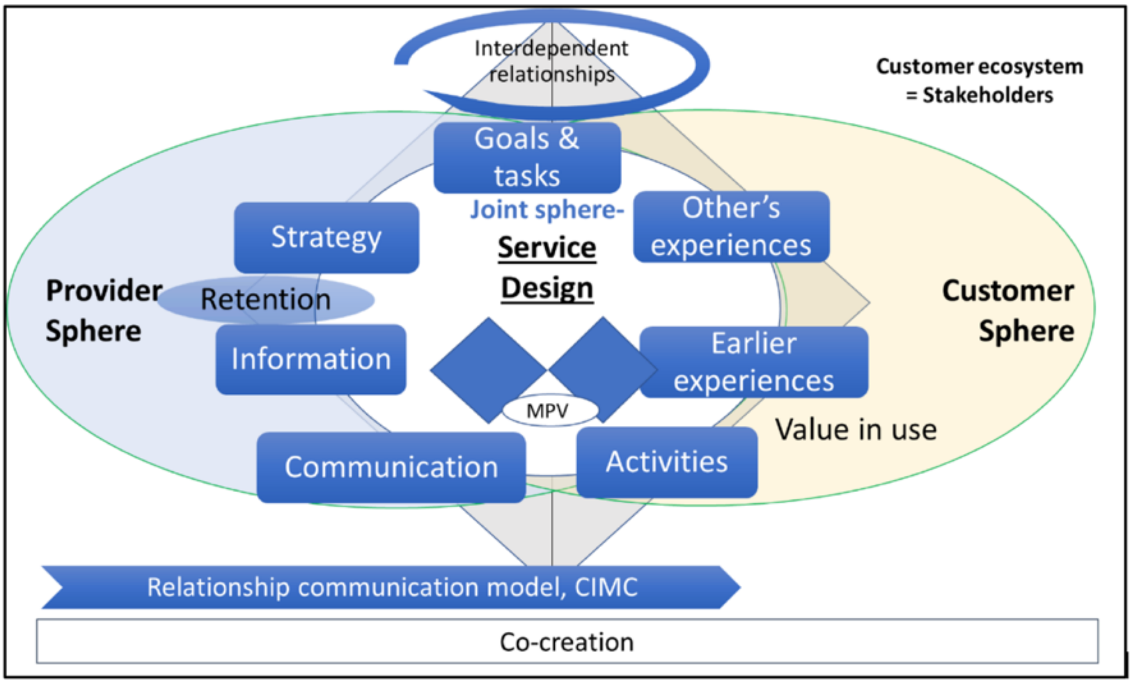



Figure 58: Theoretical framework for building a customer centric business-to-business client relationship digital tool

## 5.2 The concept and answers to questions

This qualitative case study had its focus on the first part of the empirical phase, the discover part, which defined the next phases of the service design process model Double Diamond. The main research question was the guiding thought behind the whole service design process (Table 19): "Customer-centricity—how can it be used in building a digital business-to-business client relationship tool?" Both development and research questions were used to find answers to the main research question. This meant searching for insight from both literature and empirical findings. The developmental goal of the case study was to create a concept for the client portal.

The result was a concept (Figure 59) with a combination of three elements: first, the minimum viable product based on real clients' needs; second, the expressive service blueprints describing the user journey in systems; and third, the description of all possible portal users (stakeholder map) and the personas, the main users based on the interviews. Basically, the concept answers to questions "what", "who" and "how". The MVP describes **what** features and content are needed in the portal. The expressive blueprints describe **how** the portal will function and how the client's journey in the portal proceeds. Personas describe who are the main users of the portal and the stakeholder map depicts all the possible stakeholders and users of the portal. The concept elements are discussed in this chapter when answering to the development and research questions of the case study.

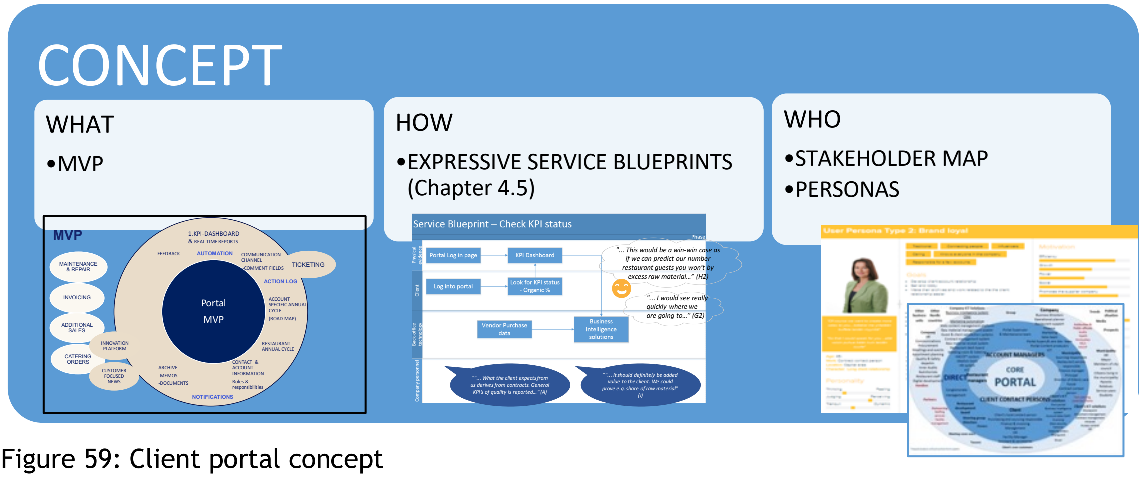



Figure 59: Client portal concept

The concept was developed by finding answers to the development questions DQ1, DQ2, DQ3 and DQ4. In this Chapter 5, the research sub questions RQ1, RQ2, RQ3 and RQ4 are also addressed. Research questions helped in understanding how the developmental issues should be addressed, and also to gather knowledge.

The question DQ1 answers to what should be taken into account when building the portal, the challenges, risks, stakeholders and users. DQ2 is related to finding out what is it that matters to clients and staff—what is important to them and what is not. This is a question of abstract thoughts and feelings, not concrete needs of content or functionalities. Question DQ3 answers to the practicalities and DQ4 is about benefits (See Figure 1 on page 11). The research questions are broader than the concept development questions.

| MAIN RESEARCH QUESTION:<br>Customer-centricity—how can it be used in building a digital business-to-business client relationship tool? |
|---|
| **IN THE CASE OF FAZER FOOD SERVICES THE OBJECTIVES OF CONCEPT DEVELOPMENT:** |
| **DQ1: What should be taken into account when building the portal?<br>(What challenges there exist? Who would use the portal and who are its stakeholders)** |
| **DQ2: What should the portal be like?** |
| **DQ3: What kind of needs do the clients and the company have?** |
| **DQ4: What are the benefits of the possible portal?** |
| **IN THE CONTEXT OF BUSINESS-TO-BUSINESS RESEARCH SUB QUESTIONS ARE THE FOLLOWING:** |
| **RQ1: How is customer-centrism defined?** |
| **RQ2: What are best practises when building a customer-centric digital tool?** |
| **RQ3: How do collaborative service design methods and tools fit into a traditional business context?** |
| **RQ4: In which ways can a portal tool be prototyped?** |

Table 19: Development and research questions of the study

Before going into findings and conclusions, it is to be mentioned that there is some overlapping in the answers to the development and research questions. This was already seen when interviews were coded. Interviewees brought up in the same sentence feelings, needs and challenges and the same sentence could be coded to all of them depending on the perspective. This implies that there are no mere needs, but rather a complex bundle of needs being influenced by various factors. Needs are more than practical issues, they are evoked by challenges, desired benefits, by a story heard from a stakeholder or by daily actions and ideas.

Next the study findings and conclusions are presented by answering to each of the questions presented in Table 19:

**DQ1: What should be taken into account when building the portal?**
Understanding the problems, the clients and staff face in their current work, and what kind of challenges they perceive in the portal, should be also taken into account when building the portal, as this helps in solving current problems and preventing them happening again in the new system. These topics were discussed in Chapter 4.2.5.

*CHALLENGES*
**Communication was seen as a current challenge on both sides** (see Figure 60). This covers various issues related to communication: is information shared to all parties, are people being overloaded by emails, are they tired of archiving documents from emails, is finding previous conversations and documents time consuming and assuring whether both sides have the same document version when they are in a common dialogue, and even the basic issue of whom to contact, and in which issues. Especially staff were looking forward to getting rid of the manual work.

One finding was surprising: the clients were the only ones wishing for a guest feedback view and action log to its process phase. Why did it not come up during the interviews or workshop inside the company? Could it be that the importance of guest feedback is greater to the clients than assumed? Does this imply that the current feedback system is not adequate or was it just a coincidence that no one inside the company brought it up? This is suggested to be taken as a topic to discuss inside the company. The quality of communication from all the perspectives should be top priority when building the portal.


Figure 60: Current challenges (grey colour both clients & company, blue only clients)

Could the portal help in solving these problems, if it is well-built and used by both parties? Would it help in communicating to all the different directions? One conclusion of the findings related to the challenge in communication is, that the internal communication between, e.g., the account manager and the restaurant manager (Figure 61) needs to be in line. This means that both parties should know the relevant conversations and decisions related to the client. For the client, this kind of communication comes out as one clear message, and the external communication looks like a calm horizontal view, in which both sides can see what's coming and what to expect. In case of lacking communication inside the organization, the message is not coherent, which might cause waves and unexpected events. Keeping the sea calm, and ensuring that the messages come out as one, is important not just for the current situation, but also for the retention and the whole brand image.


Figure 61: Company's internal communication towards the client

According to the findings communication is not happening to only one direction, but has several directions (Figure 62). The communication in the first challenge (1.) concerning the documents being sent is mainly directed from the account manager and restaurant manager towards the client contact person. The second challenge (2.) is related to communication where information should be transferred to, e.g., new employees. The unclear communication (3.), and not knowing the current status (4.) of a situation, are related to the communication between the account manager, the client contact person and the restaurant manager. The problem of not knowing whom to contact (5.) was related mainly to situations, in which someone else than the restaurant manager or account manager should be contacted. The feedback related actions to be informed to the customer was a challenge (6.1), as well as being able to monitor feedback and their cumulation (6.2-6.3).

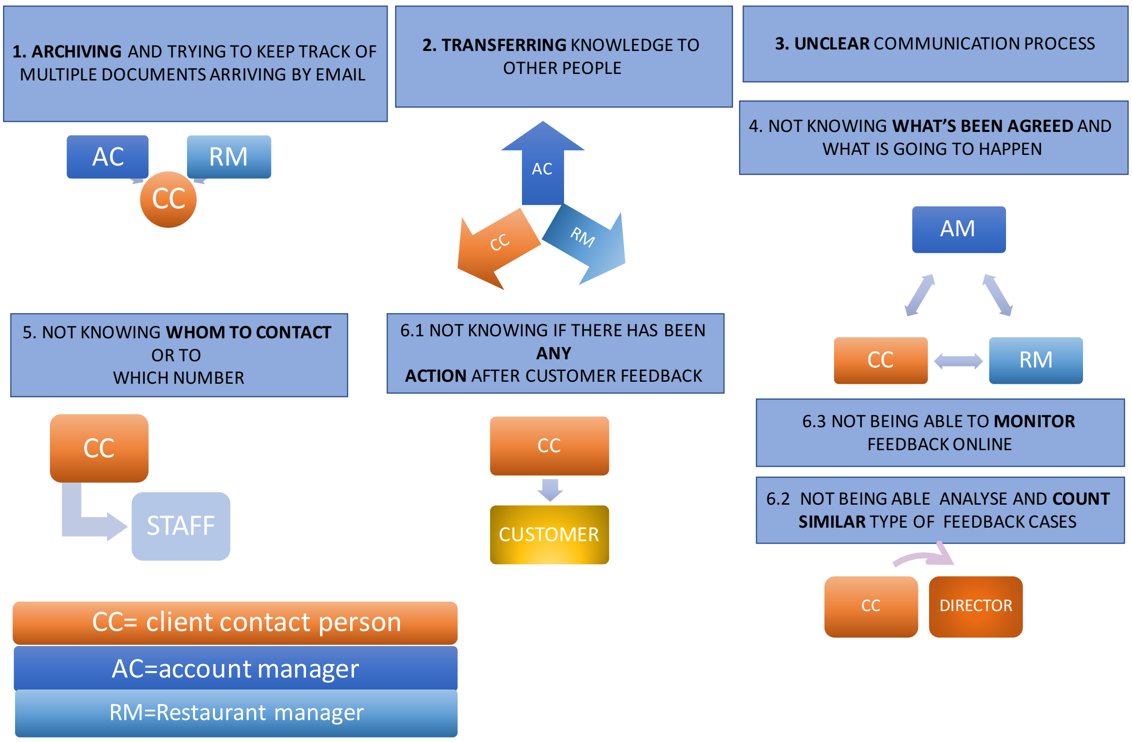



Figure 62: Directions of communication in client relationship related to the challenges

Other challenges were related to the portal system itself. If the system would become too complex to use, people would not use it, which was seen as a challenge by both sides. Users should be able to trust the system and its data. The company personnel brought up how important face-to-face communication is in client relationships, and that it should be prioritised, not the system. Benchmark interviewees stated, that the portal could in fact support the face-to-face communication, not diminish it. According to the empirical data, there is a shared feeling among clients, staff and experts that the digital tool development projects, such as the portal, have generally a risk of not being allocated with enough resources and real ownership to maintain it. Having client portal itself did not seem to be the reason for the

slight resistance inside the company, but rather how much it would take their time to learn, and whether all parties would use it.
One conclusion of findings is, that the empathy map's "pains" section should be seen as containing three kinds of challenges: the ones related to the current situation, the challenges related to creating the service, and the risks perceived in the service once in use. There was an obvious difference between clients and the company in how they interpreted the pains part. The company was more concerned of the risks when creating the portal and maintaining it, whereas clients thought more about the current challenges they face. It is suggested, that these three questions could be added to the Empathy map described in Figure 23 (page 65).

*COMPETITOR'S SOLUTIONS*

The competitors probably struggled with the same kind of challenges of communication before creating the portal, as their description of benefits seemed to be comparable with the desired features and content in this study. According to Grönstedt (2000, 212), the company A's portal was in the key strategic role in enabling efficient communication between all parties. As Baltes (2016) suggests studying competitor's solutions to keep up with the competition, the portal can be seen as a competitive edge if created to fit client's needs.
Analysing competitor's solutions gave valuable ideas in what should be taken into account when building a portal service, and how other companies see its benefits. The idea was to find out whether they have any solutions and what kind of features they include. The competitor analysis gave more information than expected, as real depictions of portals were found. This information was valuable, as it gave a better picture of where the company of this study stands, and whether they are acting earlier or later than others when building a portal solution. According to the results, two companies, A and B, most probably have a client portal. As Grönstedt's book (2000) was published 17 years ago, company A's portal is celebrating now its 17th birthday at least, which proves that company A is an early actor within companies offering portal services to clients. In short, according to the analysis based on website data**, the company in this study is lagging behind the global companies, A and B, but might be well ahead compared to its domestic competitors.** A and B are also in the framework agreement.

*USERS AND STAKEHOLDERS*

When building the portal the **stakeholders need to be identified,** as they are all part of the ecosystem influencing the needs. The final stakeholder map is presented in Figure 61. In this case study, the main users according to the stakeholder map were the client contact person, the account manager and the restaurant manager. In addition, both sides have various departments linked to the portal, either in the role of creating data, maintaining the system or using the data in it. All these levels need to be identified and user rights created according to their needs. Also, other systems exporting and importing data need to be defined and integrations tested.

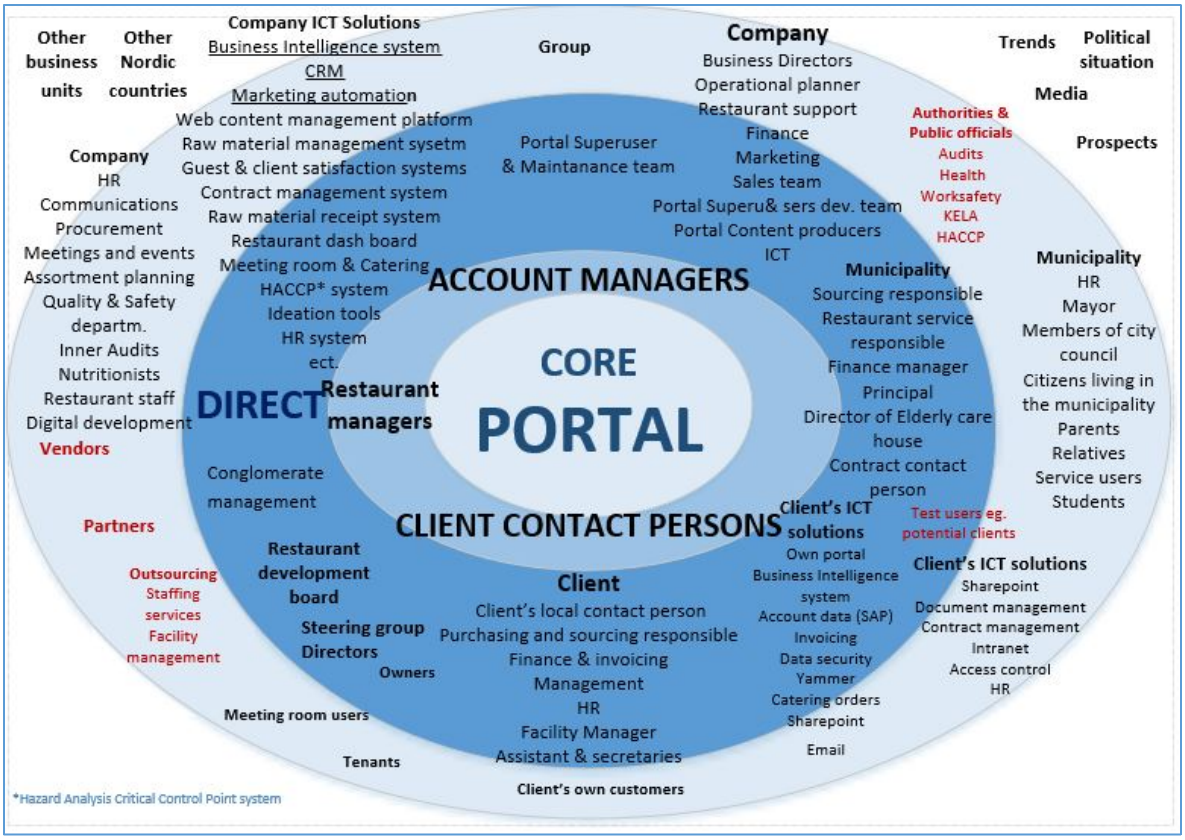



Figure 63: Final Stakeholder Map

In the outer circle are stakeholders such as Fazer group, other business units, partners and, e.g., business park tenants, who also influence the KPI needs to be followed in the portal and what kind of data should be reported. They don't need an access to the portal, but they have an impact on what data the main users need to follow and what functionalities are relevant. The point the main users' needs are connected to what is important to them in order to succeed in work. This might be, e.g., reporting the KPI, minimizing the costs, or making sure their clients receive the best restaurant experience possible.

According to the third workshop, the Business Intelligence system and the CRM are the main supportive systems which should be integrated to the portal. There were also other systems which need to be linked to the portal, in case the MVP is created (see data flow Figure 53, page 113).

*CLIENT CONTACT PERSONS—MAIN USERS FROM THE CLIENT'S SIDE*

The following two personas are based on the insight gathered from the client interviews by the interviewer. They are named "Dynamic" and "Brand loyal". Both personas can be men or women. The first persona (Figure 64) is a very dynamic career focused person. This person is responsible for taking care of several supplier connections. She wants efficiency, business benefits and clear communication with the provider. She might be sometimes overwhelmed with the amount of emails, but as a fluent ICT person, she fights her way out. She is used to portals and the ones she uses must work well. She might even have participated in developing one in her own organization. She uses a lot of digital services and she expects those from the supplier as well. This persona type was present in all contract types.

The second persona (Figure 65) takes care of the supplier contact as a part of her other work. The persona has a lot of other responsibilities and is a highly valued expert in the company. In most cases, the persona has been a contact person for a longer time and knows the supplier well. A mutual respect is present, and loyalty both ways is concrete. The connection is close to synergy: they want to sell the company brand and are proud of being the company’s client. They expect high quality and renewals, as they are constantly doing those themselves. This persona type had more client contracts with a management fee contract than the other one. This relationship resembles the interdependent relationship described by Woodburn and McDonald (2011, 54).

The contract type and its content influence client’s needs. Another issue which came up when creating the personas was the strong brand loyalty of the second persona. Could it be that they are fascinated of the company brand? Osterwalder et al. (2010) suggests, that if the customer likes the brand, displaying it might feel like a gain. This might create a sort of a solution where everyone benefits. Reflecting the different types of partnerships by Woodburn and McDonald (2011, 54) to the clients with different type of agreements (own risk and management fee contract), it seems that the management fee agreement clients could become integrated client relationships, whereas the own risk contracts seem close to the idea of interdependent relationships. In the management fee contract, the provider is more an outsourced part of the client company, whereas own risk restaurants are separate services offered to the client. In the management fee contracts, the two companies are more connected by operative functionalities than the own risk restaurants. The major difference between these two is, that the need for an automated maintenance fee report is only with clients with maintenance fee contract.

Figure 64: Dynamic Persona


Figure 65: Brand loyal persona

**DQ2: What should the portal be like?**

Building a client portal should start by understanding the client and be based on real needs, which can resolve a challenge the client is currently facing (Tschimmel 2012). Needs can be also derived from direct needs without being caused by any deficit. Daily routines, company systems and other influencing stakeholders should be taken to account when building a portal. Being able to build a customer-centric digital portal requires seeing the world through client's eyes.

According to the results, the portal should be easy to use, which meant different things for different people. Some described easiness as logical structure, some as fast access. Therefore, making the portal easy enough is important. It should be tailored according to client's needs with required integrations. Another topic was reliability of data accuracy and data security. This seemed to be self-evident for the clients, whereas staff saw challenges, e.g., in getting all the data correct in the current systems and having them real time. To be able to have all this in place, the client portal needs a clear governance structure with clear responsibilities beginning from the system building phase.

**DQ3: What kind of needs the clients and the company have?**

The clients and company had several wishes for content and functionalities. As this study uses the Lean principle's minimum viable product approach, the content and functionalities were prioritised (described in Chapter 4.3) and the result was the minimum viable product. Figure 64 pictures inside the circle all the functionalities and content that are included to the MVP based on Figure 51, page 110. The features outside the ring are placed on the road map. It is to be noticed, that all these are related to communication in some level. In addition, most of these functionalities and features are also in competitor's solutions according to the analyses. In the MVP, the restaurant and development annual cycles were not mentioned in any competitor solution related source (e.g. Agasthi 2017, Secoya 2017 and Grönstedt 2000). They neither mentioned any innovation platform related functionality. Yet, it is possible that they have these functionalities and have not mentioned them, or they have developed them later. Content and functionalities were discussed in Chapter 4.2.5.

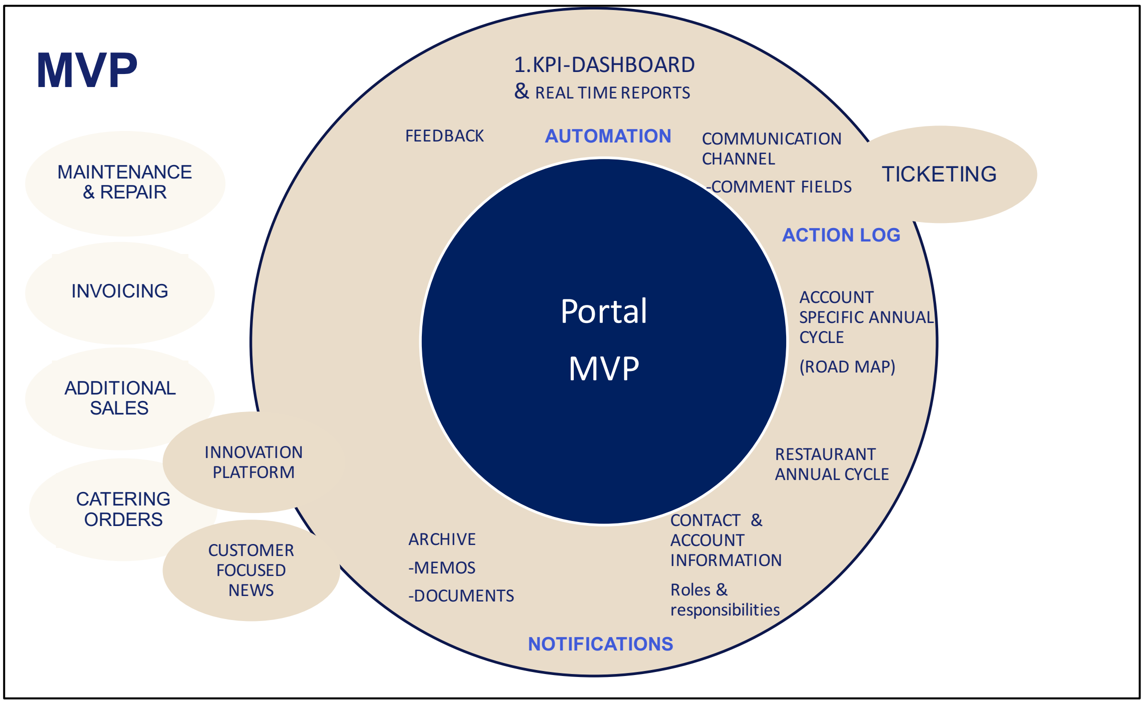



Figure 66: Minimum viable product for the client portal concept

It was surprising that clients gave more ideas in total than the internal interviewees. The interviews also lasted a lot longer, even though less time was reserved. Clients really wanted to tell their opinions, which was considered extremely valuable for this study. Features and functionalities wished by the clients and the company were quite alike. What differed, was the clients' ideas related to, e.g., catering, and material needed for the material bank. They also wished to see the guest feedback results.

**DQ4: What are the benefits of the possible portal?**

According to the interviews and workshop the portal offers several possible benefits for both the client and the provider (see Figure 67). One of the main insight of this study was that everything in client relationships is linked to communication, also concerning the client portal and its benefits. Transparency is linked to the possibility of following KPIs, keeping on track, sharing knowledge, and having all client data in one place for both sides to access. The portal was seen as helping in daily work, saving time and providing a possibility to have access whenever needed and decreasing manual work. It could be considered as a competitive edge in case the portal engages its users, especially the clients.

There are also various financial benefits to be gained. The portal could be used to catch new clients from the sales funnel and engage them with more knowledge and competence (Leboff 2016, 14, 92). It can have indirect financial benefits as well, as it could be used to estimate costs. Another benefit is to use the portal for sales purposes, either for added sales for the current customer, or for testimonial proof of references in new sales. The more leads, the more sales, and further on, increased retention rate. If the funnel is thought from the perspective of the Customer-dominant logic, it is the customer who is the owner of the funnel, not the company, as customers choose which companies enter the client's funnel. Trust and credibility increases the possibility of clients entering the digital funnel described by Leboff (2016, 14, 92). Once the client is in the company's funnel, an image of a consultative company engages the client. Marketing automation could be the tool to engage the client. Other indirect financial benefit is the saved time when all data is in the portal easy to find.

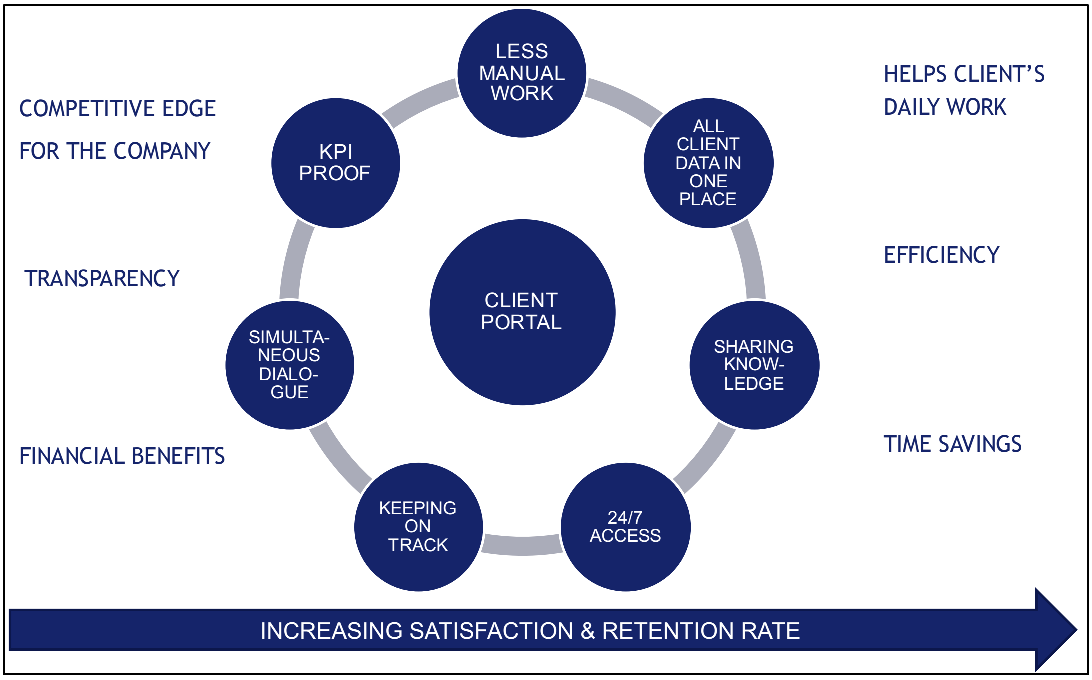



Figure 67: Benefits of the portal

In general, there was a positive attitude towards the client portal concept. All clients were interested about it, some very excited. Inside the organisation people were motivated about the portal idea, and only a few of the interviewees were a little sceptic, thinking whether this would be “yet another system” and whether clients really need the portal. This would not be a problem at least according to the client interviews, which proved that they see the portal as a system offering various benefits, such as less time used in archiving, managing client relationship etc. The results indicate, that there exists a demand for the client portal. As mentioned in Chapter 1.1, there already exists a portal solution which fulfils the basic requirements to be able to offer services required by the governmental institution, but there is a need to develop the client portal to fit the needs of other clients to achieve the desired benefits. Retention seems to be the main “end” benefit of the client portal from many perspectives.

According to the basic Google search and the sources found on (Agasthi 2017, Secoya 2017 and Grönstedt 2000) competitors’ solutions, portals bring a lot of benefits. The main benefits are: enhanced client relationship strategy, improved processes, as well as efficiency in costs and communication. It also lifted the organisation’s capability to react to client’s needs faster, and increased service quality.

These were the development objectives and answers to the research questions. Next the research questions are addressed based on the insight gathered from the client and staff interviews and workshops, as well as from the benchmark interviews and competition website search.

**RQ1: How is customer-centrism defined?**
All the interviews, especially the benchmark interviews, gave answers to this question. Experts were asked during the interviews what customer-centricity means to them. Clients and staff were not addressed the question, but quotes were picked out from the interviews. Staff sees, that in order to be customer-centric, the company needs to first discover what is added value to the client. Whereas benchmarking interviews pointed out, how companies shouldn't claim being customer-centric without really involving the customer. In addition, staff and experts defined that customer-centrism is testing, asking for feedback, and developing the service together, which in this case was the portal. Staff also added, that customer-centric development is taking care of the client and supporting them in, e.g., training the client to use the tool and raising their interest towards its use. All these value client's opinions, engage and create trust, and help the client.

In short, according to interviews and theoretical literature in this thesis, listening to clients, seeing their perspective in the service, engaging them to co-creation and constantly developing the service according to their feedback, before and after launch on a regular basis, is what customer-centricity is all about. Customer-centrism is not only actions. It has to be seen as a way of thinking in general, a customer-centric mindset. Could it be defined, that customer-centricity in business-to-business context is a customer-oriented company culture embedded in all company processes, especially the ones linked to the Customer-dominant interaction arena defined by Heinonen et al. (2010)? Especially, if added with the goal of discovering and maintaining a constant knowledge of what is added value to the client, by actively participating in their lives and co-creating with them? As a conclusion made of the theoretical framework in Figure 12 (page 43) is that Customer-dominant logic is a customer-centric theory, as it sees the service from the customer's perspective. CDL is the step towards an in-depth understanding of customer experience (Heinonen et al. 2010). According to the results, having a clear communication is a prerequisite for this. Communication should work so that the clients wouldn't even have to think whether it works or not.

**RQ2: What are best practises when building a customer centric digital tool?**
Building a portal requires deep understanding of needs, a customer-centric approach and **a competent human and content leader**. Following benchmark interviewees' and Arthur's (2013) advice transformation needs a person to lead it. As a conclusion, it is proposed that digital tool creation projects in the case of traditional business, such as Fazer Food Services,

should have a socially skilled and technically oriented leader with a competent team capable of deciding a suitable platform, system integrations, realistic budget, achievable timetable and most of all, be able to motivate people in the organisation, as well as create connections to the clients to be able to test the service with them. According to the benchmark interviews, best practises for customer-centric portal creation contain the following aspects:
- having the right mindset spiced with a sense of business
- choosing the right project leader, team and methodology
- testing, asking for feedback and co-creating together with the client as described above
- creating a minimum viable product
- creating standards and confirming the technical capabilities and
- using the 80/20 rule and concentrating on the important 20 %.

According to the case study, workshops and interviews, best practises in building a customer-centric digital tool includes also communicating between all the project members and engaging the current and future owners to the project.

Was this case study done by the customer-centric principles defined above, and were the tools customer-centric? As a conclusion, in this research customer-centricity was actualised by listening to the clients, prioritising features and content to the minimum viable product, based on the insight gathered from the interviews, and being sensitive to the needs of the inner client as well.

In this case study, one of the biggest benefits is probably the connections already created to the clients, as they are now ready and willing to test and co-create with the company. Their enthusiasm was almost touchable, which is a great value not to miss. In addition, resources must be reserved to the training and system adoption inside the organisation. After this, clients in this case study could be trained by the account managers, when they have face-to-face meetings. Most of the staff, and especially the clients, had a vision that the client portal could become the main tool containing all the client relationship related data, including the dialogue and decisions for all the relevant people to access, share and store simultaneously.

The concept could be more customer-centric, if the clients would have been invited to the second workshop. Using the jobs-to-be-done tool and prioritising features in customer experience and business value matrix with them could have been valuable. Therefore, it is suggested that clients should be invited to the workshops when the portal system is being built, and in other service design projects as well. A culture of co-creation takes time to emerge, but as the internal workshops raised interest despite of their initial small number of attendants, people are becoming more and more open to the idea of co-creation.

Using these collaborative service design tools and methods raised another question. **Were the tools customer-centric themselves?** Empathy map fitted well to the customer-centric approach as it focused on the client. It was not used in collaboration with others in this case study, but it could be tested as a workshop tool in future projects. Empathy map connects with CDL, as they both aim at understanding client's life, ongoing activity, and experience structures.

Creating a mind map during interviews, and creating the stakeholder map in the workshop, made the participants see the service from the perspective of their ecosystem (Lusch & Vargo (2014, 4-91) and triggered new ideas. Especially placing the client in the middle and asking the person to fill in the stakeholders related to the service could be considered a customer-centric tool. A customer-centric tool is also the jobs-to-be-done canvas, as it is used to understand the customer's motives and needs. The customer experience business value matrix is half customer-centric and half provider-centric, as it has both aspects in the canvas. The expressive service blueprint was also mainly customer-centric, as it describes desires and challenges also from the client's point of view. The conclusion is, that despite the last two tools mentioned above, the tools applied in the case study can be considered customer-centric.

**RQ3: How do collaborative service design methods and tools fit into a traditional business context?**

The traditional business context is different from, e.g., ICT business. The focus is usually on people and not that much on technical functionalities. According to the experience gained from this case study, the collaborative service design tools fit into the traditional business context when people took part in the workshops. People who had not participated in the workshops seemed not that easily understand what the portal was about. The participatory workshop model worked somehow, but maybe be due to the lack of time, it was hard to find participants to the workshops.

MeWeUs as a brainstorming tool and World Café are collaborative facilitation tools in service design. Jobs-to-be-done, mind maps, stakeholder map, customer experience and value matrix and "gains and pains" were also used in collaboration with clients or staff. World Café and MeWeUs were easy for the workshop participants to understand. Mind maps, the stakeholder map and "pains and gains" were also adopted by participants without any problems. Whereas the jobs-to-be-done canvas, as well as the Customer experience and value matrix in the second workshop, seemed to be a bit confusing and took more time than thought during the workshop. The conclusion of the findings is, that the collaborative service design methods do fit the traditional business context, but in case the thought is to implement them to the company culture as standard tools, it is better to start with the easy ones. Testing them on different projects is a good starting point.

RQ4: **In which ways can a portal tool be prototyped?**
The major challenge clients saw in the adoption of the system was its usability. They pointed out, that the client portal has to be easy to use, otherwise it is useless. Schneider and Stickdorn (2010, 132-133) underline the importance of prototyping the service in the real environment, which was unfortunately not possible during this thesis work for the limited time used for the concept creation. Osterwalder et al. (2014, 225) suggest asking clients, which features they want to keep, develop or give up. In this study, clients and staff were asked what is their ideal portal, which features matter to them and which not.

The portal was first going to be prototyped as a mobile app. This idea was forgotten when the ICT department's people in the third workshop said that they would prefer use cases. Therefore, service blueprints were used. Prototyping a portal could have been possible also on paper by drawing the functionalities. The mobile prototype was limited from the scope of this thesis. Prototype programs could be valuable in the next step when the portal system project starts. It could be used to test the portal concept with customers and gather feedback.

Based on the results from this study, some proposals can be made. Testing the portal with the client and gathering feedback from them from the beginning of the system project is important, in order to create the logic in the client portal they seek. This was also a key to successful digital tool, according to the benchmark interviews. When it comes to theory, testing and asking for comments is a key idea in both Service design and Lean principle (see Chapter 2.4). Testing could start by going through the service blueprints and minimum viable product created in this concept phase. Testing should be done with the portal users and ICT inside the organisation. A draft prototype could then be drawn on paper or on a prototype program and tested with clients. These testing sessions should be as often as possible, and nothing should be made ready before testing them with real clients and iterating further if needed. Benchmark interviewees pointed out how this can be much cheaper than developing services to the market without it being interested of the idea at all.

This chapter focused on answering the development and research questions whereas the next Chapter 6 is dedicated for discussion and Chapter 7 discusses implications for further studies.

# 6 Discussion and further implications

Did this study fulfil the standards of conclusions? According to Miles, Huberman and Saldana (2014, 311), qualitative research standards are: objectivity, authenticity, reliability, credibility, transferability, and the possibility to implement the outcome into real action. In this study, the profound and explicit reporting of the empirical part and findings supports the research objectivity. The reliability is in a rather good level, as the development and research questions are strongly linked to the theory. Silverman (2011, 356) points out, that the study should be based on prevailing literature. In this study, the connection to theory is described in the thesis in several phases, and depicted in frameworks in Chapter 2.5 (Figure 12) and Chapter 5.1 (Figure 58). The research questions were not at first so clear, but were further iterated during the research. The answers were connected to each other, and therefore they slightly overlapped. To ease the understanding of the questions, the Figure 1 (page 11) was drawn of how the questions are connected (Chapter 1.2).

As the results are based on one case company, Fazer Food Services and its clients, most of the findings cannot be generalised and no statistical methods were used. Only best plausible explanations (Miles et al. 2014, 278-279) were sought in this case study, by aiming at conducting rich research with high level of credibility. The definition of customer-centricity could be though partly generalisable after further iterations in the traditional sector's digital business-to-business context. This is an implication for further studies. It should be also mentioned that only a few clients were interviewed. In order to confirm the validity of the concept, it should be further tested with clients, which did not take part in this study.

The thesis work seems to have fulfilled the goal, as the concept was created, and all the research and development questions could be answered. Research question "In which ways can a portal tool be prototyped?" (RQ4) was the only question to which there was not as much insight found as to the other questions. In case the concept is to be used to create the real system, it should be also expanded to fit the needs of the public sector, as this was not in scope of this thesis. This could be done by asking them for feedback of the minimum viable product and tailor it further for them. Would this mean a different interface, remains to be seen.

The thesis writer's role was also described as being an employee and a member of the concept project. The thesis writer had a strong belief in the need of creating a concept, as it would be the way to discover whether the client portal should be built or not. She acknowledged the risk of influencing other people, and avoided this by not sharing her own ideas to the interviewees and workshop participants.

Credibility needs more focus in this discussion, as it describes whether the results and findings are convincing, as Miles et al. (2014, 312) and Silverman (2011, 351) point out. In this case study the thesis is profound and leads the reader. It is logical and based on the Double Diamond model. The findings and conclusions are described under their research or development questions to make the insight as easy as possible to the reader to comprehend. Empathy map was used as a framework in the discover phase, and later in the conclusion it is described, how it doesn't serve that well if needs, challenges, and feelings are partly the same. Also, issues such as not being able to fully complete certain parts in the second workshop were described. The lack of time or unclear instructions led to the jobs-to-be-done to be only partly filled by the participants.

A suggestion for further research is made. Could it be further studied, why the interviewees perceived the “pains” part differently, as interview results showed how “pains” were often mixed up with needs? This raised a question: should more research be done on how to separate between e.g. “pains” and “thoughts and feelings”, or “gains” and “say and do”, as these might overlap? Could the Empathy map be seen as an overlapping map depicted in Figure (68) below? The figure also implies that “pains” and “gains” are the main motivators, and the other parts are influenced by them. Which of these influences the most? Could it be that, e.g., personal background, current situation, previous experience, and other people’s opinions influence what the person thinks when answering these questions? Testing the empathy map with Figure 68 would also be interesting, as it doesn’t map the ideas so strictly.

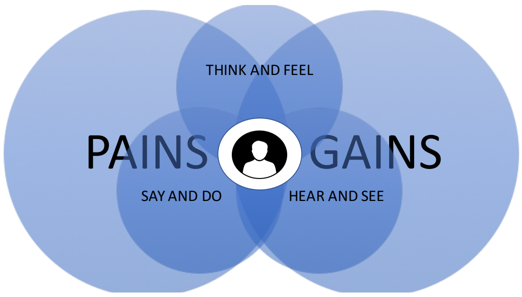



Figure 68: Not so black and white -Empathy map

Triangulation is used in having three sources, such as three benchmark interviews, and more than three internal and client interviews. Data sources were also several. Company documents, scientific literature, competitor analyses, workshops and people in interviews all deepened the knowledge gathered. Negative findings were also brought up, such as that the portal development should start after resources and other systems are in place. This was a risk brought up by the staff.

The abductive approach in this study supported theory creation, which is one benefit of abductive research (Denzin & Lincoln 2011, 361). As a conclusion of the literature part, the scientific literature in the field of client relationship is missing the customer-centricity perspective, and therefore it can be assumed, that this research contributes to the Customer-dominant logic with its theoretical framework depicted in Figure 11 (page 34). Further studies could be done for iterating the customer-centric client relationship theory model, which was presented in this research in Chapter 2.5 (Figure 12, page 43). This thesis gives also new insight into customer-centricity by defining a set of practise for creating digital tools in customer oriented manner.

As the communication is a core issue according to the results in this study, it could be further studied by using the Relationship communication model created by Grönroos and Finne (2017). It addresses the issue of communication and dialogue in client relationship, instead of seeing the client as a passive receiver of company communication message. Relationship communication model sees the client as an active interactor. In their model, they focus is on outside-in communication instead of inside-out communication.

In the beginning of the research it was even unclear, what a digital concept could be. Would it be a list of needs, a stakeholder map or a mobile prototype? But then there was a moment when the thesis writer realised to ask, to which question the outcome, e.g., personas, give an answer to. In the case of personas, it was: “Who are the main users in the client’s side?” This was a valuable lesson.

DISCUSSION OF HOW THE CASE STUDY PROGRESSED

Once the service design process started, it took the thesis writer along and gave a frame to the case study. The arguments on which the service design Double Diamond process model was chosen, seemed to be valid. For instance, it contained the relevant phases which fitted the goal of this study, which was to deliver only the concept, not a ready service. It was also visual and easy to communicate inside the organisation during workshops and other instances.

One of the challenges in this project was to keep up with the timetable, and to finish the project before the end of the year 2017. Part of the results remained to be analysed still in the beginning of year 2018. The timetable was tight, as there was only 3.5 months for the workshops and 1.5 months for the client interviews preceding the workshops. As the concept project included three workshops and various interviews, finding suitable times was a challence. Another challenge was, that the participants in workshops were only partly the same, which meant having to introduce the project in the beginning of every workshop. More time should have been reserved to the second workshop, as its tools were more complicated. Nevertheless, it ended in time, but the participants needed to hurry to be able to finish the jobs-to-be-done canvas and the customer experience business value matrix. The empirical case study needed a lot of planning and a flexible mindset open to the iterative nature of service design, meaning, that new ideas were constantly taken into account. Iteration emerged in many levels, which fits well the abductive approach (e.g., Eriksson & Kovalainen 2016, 24) of this thesis. It meant changing tools and methods, as well as updating the list of interviewees with new names during the interview process. In addition, the main theory was first thought to be Vargo and Lusch’s Service-dominant logic (e.g. 2008), but the more the thesis writer read scientific literature and the further the process proceeded, the more the Customer-dominant logic (e.g. Heinonen et al. 2010) started to lift itself. Also, the empathy map was first used only partly, but after the first workshop, the thesis writer realised, that it contained the main development questions, and not just the questions related to challenges and benefits. In addition, there was an idea in the beginning to create personas with the staff and later reflect those personas to the clients based on the interviews. In the end, personas were created after the interviews, as the thesis writer realised, that the goal of the thesis was not to test the staff's idea of personas, but rather to understand who the clients really are, without being influenced by the personnel beforehand. Making personas after meeting the clients seemed more customer-centric and created personas for this specific client portal. A new iteration idea would be to ask clients for feedback of the MVP and develop it further. This is because the final MVP (Figure 66) still had quite many features and the clients could be asked to put them in a priority order.

Transformation in mindset and in digitalisation is happening. This might raise change resistance, which should be seen as a positive sign, as it refers to the change actual happening. The management in Fazer Food Services is customer-oriented, which is needed for this kind of service design projects to become real. It is suggested that, once up and running, the client portal should be measured. The client satisfaction rate should be measured before the client portal adoption, after its launch, and at least every half a year, either as a part of the client satisfaction survey, or by its own net promoter score index as a survey popup on the client portal. Another KPI could be the retention rate among the clients adopting the client portal system. Other KPIs could be the time used in the client portal, the times accessed the service, the number of actions in the portal and other webpage analytics.

All in all, according to the Project Manager in Fazer Food Services this thesis work has enabled the company to understand the needs of our customers better and the results of the study can directly be used to start an implementation project when the management decides is the correct time to start such a project. The feedback of the thesis has been very positive. According to the Project Manager: "*It has been very valuable for us that Eliisa has taken the time to interview our customers, give us benchmark examples and interview the key people inside our organization. Good discussions have arisen during the workshop sessions as well … Now we have a clear concept, when the time is ready for implementation.*"

The idea of the concept built in this thesis can be applicaple to other businesses as well e.g. facility management. The theoretical take away is also possible to extend to future studies around customer centricism and digital development. All in all, this thesis offers new insight into digital development, customer-centricism and service design in practice and theoretical discussion in account management.

This case study was a journey containing several steps: learning about the company, clients, and experts in other companies. It was gathering deep knowledge of service design and all the various theories. It was creating a concept and conducting a qualitative research. The thesis writer wants to thank all the people involved in the case study and Fazer Food Services for the opportunity to create the thesis of this topic. Everyone gave their time and offered valuable insight and ideas. Thank you to all the benchmark interviewees for their ideas of customer-centricity and best practices in developing a customer-centric digital tool. I also want to thank you Päivi Pöyry-Lassila, Development Manager at Laurea University of Applied Sciences, Suvi Kaksonen, Project manager in Fazer Food Services, Eija Andström-Saarinen, Senior Manager, Digital Solutions Development in Fazer Food Services and Jaana Komulainen, Senior Service Design Specialist and Managing Director of Atwork, for all those valuable and motivating discussions. Special thank you to my husband, family and friends for the support and inspiration during this process.

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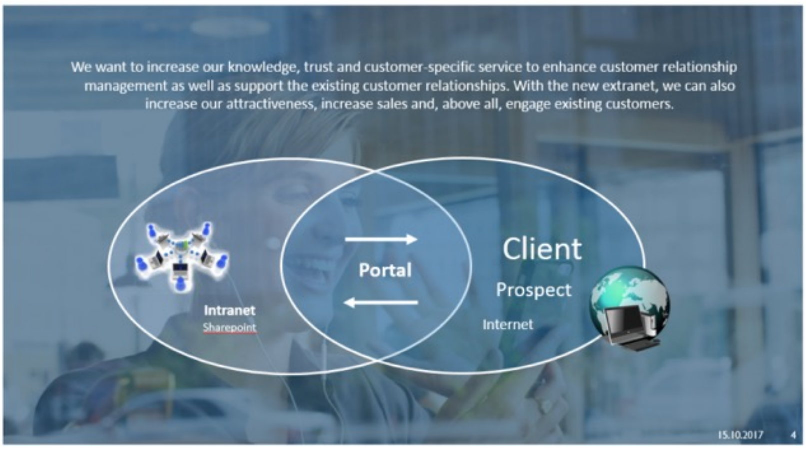
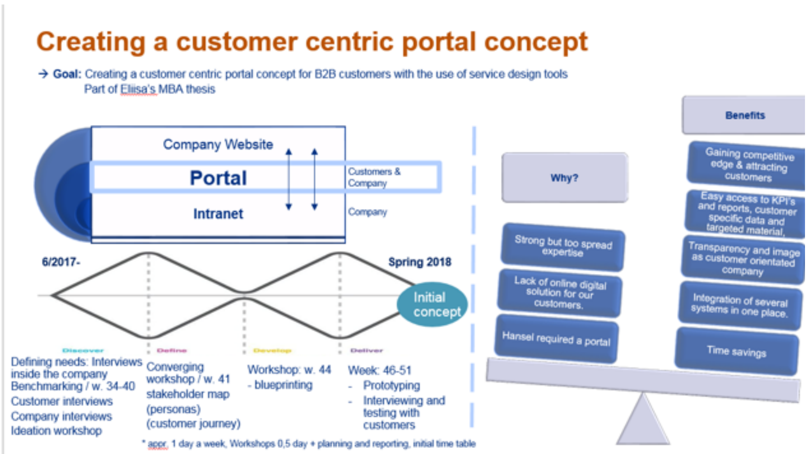
Figures

Tables

Appendices

Appendix 1: Slide examples used in the internal communication before and during the discover phase.

## Appendix 2: Benchmark interview guide

| |
|---|
| Tell me about yourself |
| How long have you done this job? |
| What kind of customers do you usually have? |
| Do you have experience in customer relationship management? |
| Have you designed systems for customer relationship management? |
| Give an example of a good digital (customer relationship management) customer-oriented tool? What about the client's point of view? Which companies have such a service? |
| Were you involved in developing or using it? |
| 1) DEVELOPER ROLE |
| How was it developed? |
| How did the process progress? |
| What kind of team did you have? |
| Which challenges were encountered? |
| Were service design tools used? |
| Which ones? Tell us your experiences of how they worked. |
| Did you develop a tool together with your customers? How? Tell us your experiences. |
| Where were the customers particularly interested in? |
| At what stage did customers participate? At what stage should they be involved? |
| How did you prototype your concept? How did it work? |
| What problems do customers usually encounter with extranet services? |
| What about service design projects? What about yourself? |
| Which benefits has it brought? Was there something you would do otherwise? |
| Were the benefits measured somehow? How? |
| What was important to customers? And for you? |
| How do you work if the customer base is very heterogeneous? |
| How did you verify the fulfillment of customer needs? |
| What are the most important principles for developing a tool for customer orientation? |
| What are the key elements of success? |
| Did you measure success, how? |
| 2) USER ROLE |
| How did users participate? |
| Why were you involved? How? |
| How did the process go? |
| Did it work? |
| Which tools were used? Were service design tools used? |
| Tell me about testing. Did you test the tool? |
| Did the tool show efficiency? Benefits? Disadvantages? |
| What are the reasons for using it? |
| Did you measure success, how? |
| Were there many different type of users involved? |
| Which were the best features of the tool? What about the worst? |

Appendix 3: Internal interview guide

| |
|---|
| Tell about yourself and your work |
| Describe how you take care of your client relationships? |
| What kind of information is sent by email? |
| When are you usually contacted by the client or when do we usually contact the client? What do they usually ask from you? |
| Describe how you take care of your connections? Do you prefere mobile or PC? Are you usually on the road or in the office? |
| Which tools and programs do you mainly use? |
| What kind of information the client expects to receive from us? |
| Have you felt bottlenecks and challenges in the client relationship? What kind of? |
| What kind of information do you send to the clients? How often and in which format? How long does it take? |
| Who else in the organization are connected to the account (client relationship)? |
| Do you transfer data into other systems? In which format? —><br>Who will need access to the portal? |
| Describe you dream client portal |
| What kind of features do you like in system interfaces? |
| How do you describe easiness? What does it mean to you in a system? |
| What are your expectations for the portal? |
| What kind of challenges you think the client might face? |

Appendix 4: Client interview guide

| |
|---|
| Tell about yourself and your work |
| How heterogeneous is your company’s customer segment? |
| What kind of interaction do you have with Fazer Food Services? How is client relationship organized? |
| Who else in your organization are connected to us?<br>> who could be the becoming end users and beneficiares |
| Have you felt bottlenecks and challenges in the client relationship? What kind of? |
| What topics are covered and what kind of documents are sent in emails? |
| Describe how you take care of your connections? Do you prefere mobile or PC? Are you usually on the road or in the office? |
| What kind of information would you like to receive from us? |
| When are you usually contacted or when do we usually contact you? |
| Do you monitor our performance and how we fulfill our promises agreed in the contracts? Which KPIs do you follow? How often? |
| Who do you report our performance in your organisation? How often? In which format? |
| Do you transfer data into other systems? In which format? —><br>Who will need access to the portal? |
| Do you currently use any portal/extranet? Does your company have any? |
| Describe the system? Which features do you like? What works and what doesn’t? |
| Describe you dream client portal. |
| What kind of features do you like in system interfaces? |
| How do you describe easiness? What does it mean to you in a system? |
| What are your expectations for the portal? |
| What kind challenges you might face while using the portal? |

Appendix 5 Mock-up used during the internal interviews

| | The service design process | |
|---|---|---|
| ORGANISATION | | |
| **What are we trying to solve/ develop?** | **What are the organisational goals?** Which benefits are we selling? | **What does service consist of?** Assumed outcome...how does it look and feel? |
| CLIENT | | |
| **Which client's challenge and desire are we solving?** | **Who are the clients?** Where do they belong? What do they respect and value? | **Why would clients use this? Which benefits is the client seeking?** |

This mock-up was used after being inspired by the USCO project. http://www.uscoproject.fi/

## Appendix 6: Benchmarking interview quotes

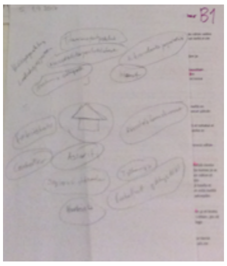
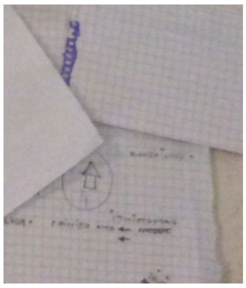
| Customer-centric digital development in general |
|---|
| BEST PRACTISES FOR A SUCCESSFUL DIGITAL DEVELOPMENT PROJECT IN GENERAL |
| - **Having the right mindset:** - “Not only the ICT mindset but rather a business focused customer oriented mindset”. / Y<br>- **Choosing the right team:** “business oriented [...] the team should be more like a holy trinity combining IT, design and business together [...]”/ Z<br>- **Choosing the right project manager:** “the role of the project manager is critical in how the team works, how clients or customer get involved, how problems are solved before becoming obstacles, how change resistance is overcome, and how the whole project is communicated [...]” / Z<br>- **Involving customers and asking for feedback, co-creation:** “Involving the customer right from the beginning” / Y<br>- **Testing, testing and again testing with the customer:** “We are not allowed to develop anything without testing it with a customer [...] We use the fail fast -ideology [...] as taking risks is the only way to find something remarkable”/Y<br>- **Choosing the right methodology:** “using a specific canvas isn’t enough, it’s more of a systematic way of working”/Z |
| **BEST PRACTISES FOR PORTAL CREATION:**<br>- “The 80/20 rule [...] influencing the 80% of users makes a huge difference [...]” / Z<br>- “Technical prequisites must be in place” / Y<br>- “It could contain elements for forecasting in order to gather more insight” / Y<br>- “I believe the modular way is wiser and then you need to plan the minimum viable product” / Y<br>- “Standardize your services as well as possible” / Y |
| CHALLENGES & PITFALLS |
| - “usually these are not only IT projects but rather about changing people’s behaviours which might be a longer process [...] people don’t realize how they waste time in nonsense instead of making things better and wiser” / Z<br>- “instead of having a strict 5-year strategy, create a strong vision, test it and look how it evolves [...] your capability to react fast will change [...] we understate the rapidity of how fast the world changes and how fast new competitors take over the markets” / Z<br>- “[...] solving wrong problems or solving problems with digital solutions, to which digital solutions don’t fit at all” / Z<br>- “If you try to make customer-centric service development, you can’t really proceed without customer’s constant feedback -you can’t call it customer-centric if you don’t receive the feedback [...]” / Y<br>- “thinking that ‘this is the way the customer will act, and they’ll surely pay for it’” / Z |
| **CHALLENGES IN BUILDING A PORTAL:**<br>- “Even though you want to do it by the way the customer wants, you might face very soon the technical limitations, especially integrations with the production management system [...] We’ve realized during the years, how we should create the portal, but it nevertheless it doesn’t take away the fact how huge work it is [...]” / Y |
| BENEFITS OF THE SERVICE DESIGN PROJECT & PORTAL |
| - “If this helps people collaborate and find new inspiration and motivation to their work, it is extremely valuable, as it takes far further than just one project.“ /Z<br>- “A very small thing can create an instant competitive edge” / Y |
| **BENEFITS OF A CLIENT PORTAL**<br>- “I could say that the core of our digital services is this portal” / V<br>- “Business interests are strong as you can measure and use the portal data for budgeting purposes.” / V<br>- “The portal creates commitment. From my accounts none have left, the opposite, we’ve gotten new clients after telling them that we have this portal and how it will help them.” /V |
| EXPERIENCE OF THE PORTAL DEVELOPMENT PROJECT |
| - “Customers were very interested in the project as it was going to ease their daily lives” / V<br>- “Face-to-face training and testing was needed for the clients to get all the benefits out of the portal” / V<br>- “Courage – we have had it in order to develop this further on.” / V<br>- “Personal face-to-face contact is still the number one when dealing with the most important clients”. / V |
| FEATURES IN PORTAL |
| - “reports, we used to email them in excel format, now they go directly from the system to the portal”/ “real-time”, “annual cycle”, “specified user rights”, “development plan”, “events”, “client data” , “requirement analysis”, “invoices”, “reminders”, “recorded and real-time webinars”, “news as a link to the webpage”, “a communication field would be really good, but we don’t have it yet”, “a chat functionality” / V |
| CUSTOMER CENTRIC TOOLS FOR DIGITAL TOOL CREATION |
| - client interviews, observations, ethnography, opportunity road mapping, mock-ups and artefacts and lean canvas / Z<br>- Lean canvas, pains & gains / Y |

Appendix 7: Creating a mindmap to use in a stakeholder map

a) Internal interviews

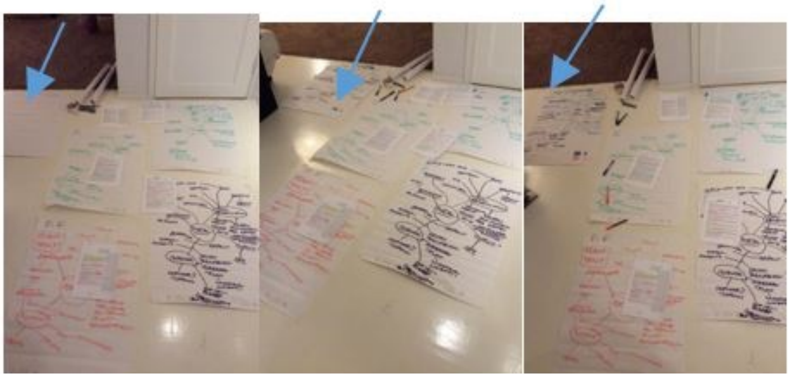
| Interviews | | | | | | |
|---|---|---|---|---|---|---|
| A | B | D | E & F | G | H | I |
|  |  |  |  |  |  |  |

b) Client interviews

| A2 | B2 | C2 | D2 | |
|---|---|---|---|---|
|  |  |  |  | |
| E2 | F2 | G2 | H2 | 1I* |
|  |  |  |  | |

*NO MINDMAP (interview done by skype)

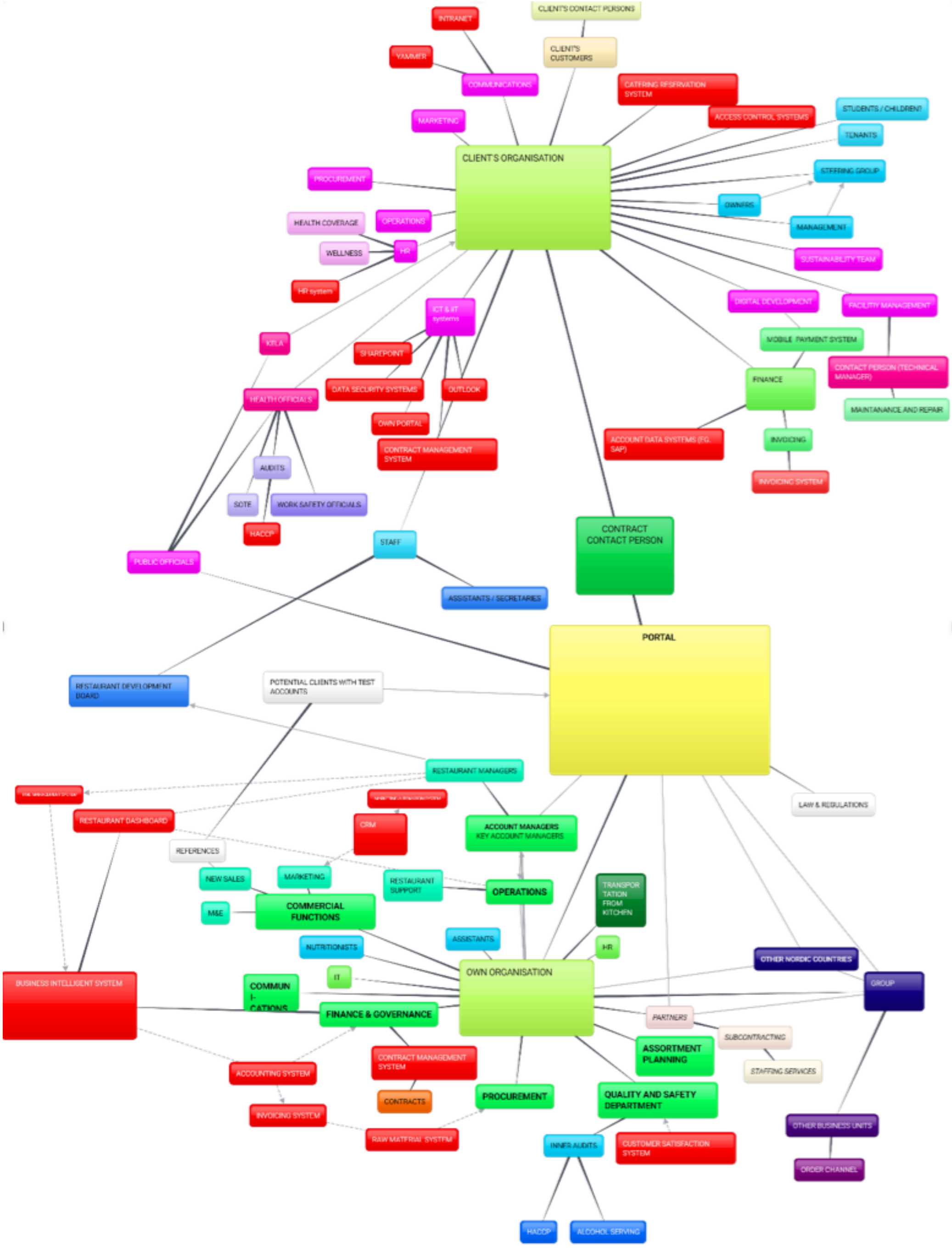
COMBINING MIND MAPS...



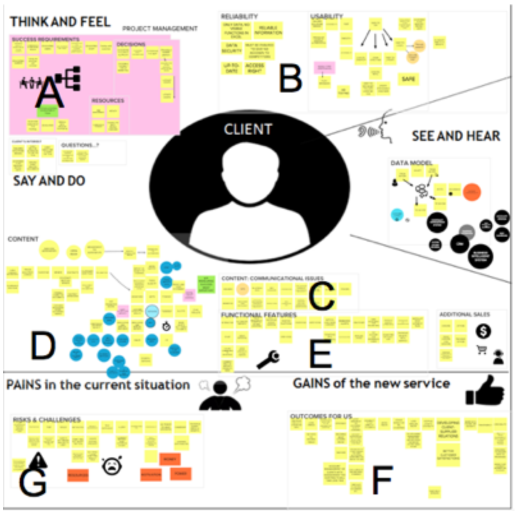
Process in creating the mindmap. The blue arrow shows how the final mind-map is filled one by one after every single mindmap.

Appendix 8: Combination of mindmaps from internal interviews and client interviews

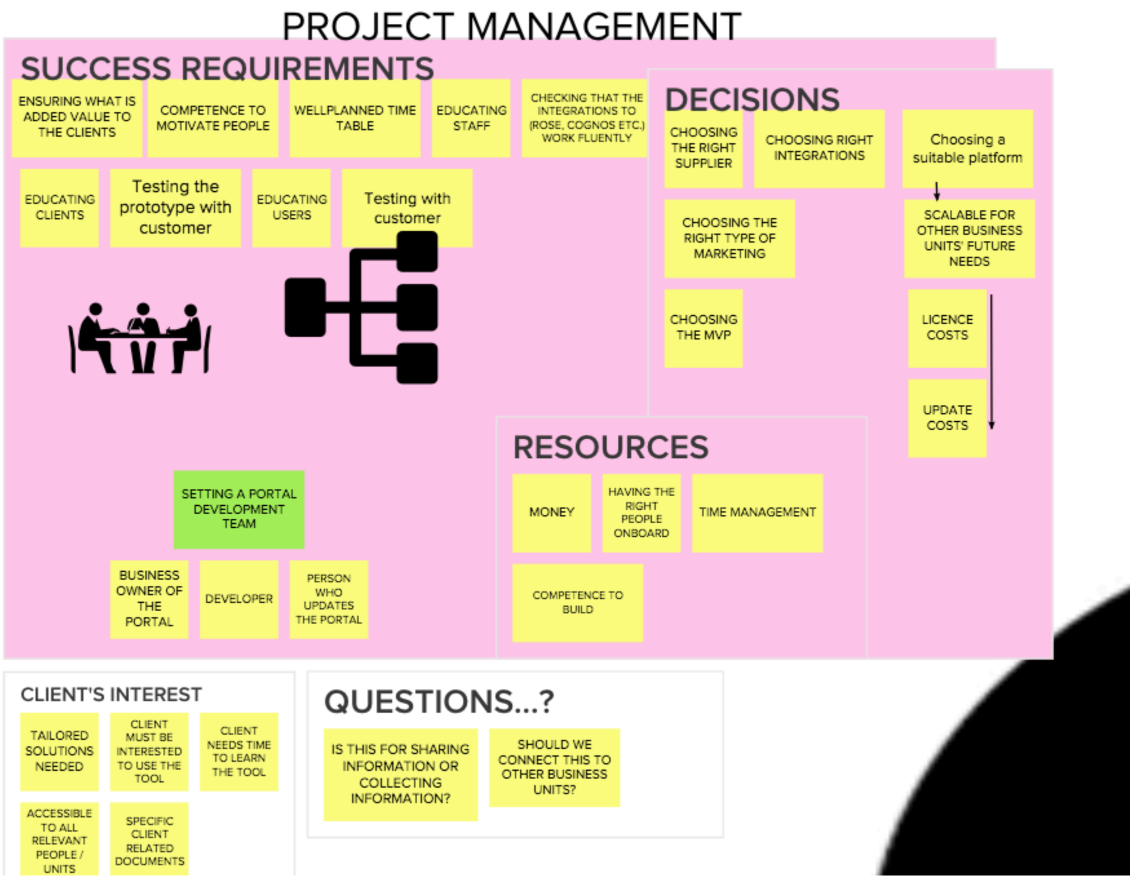
Appendix 9: Final mindmap



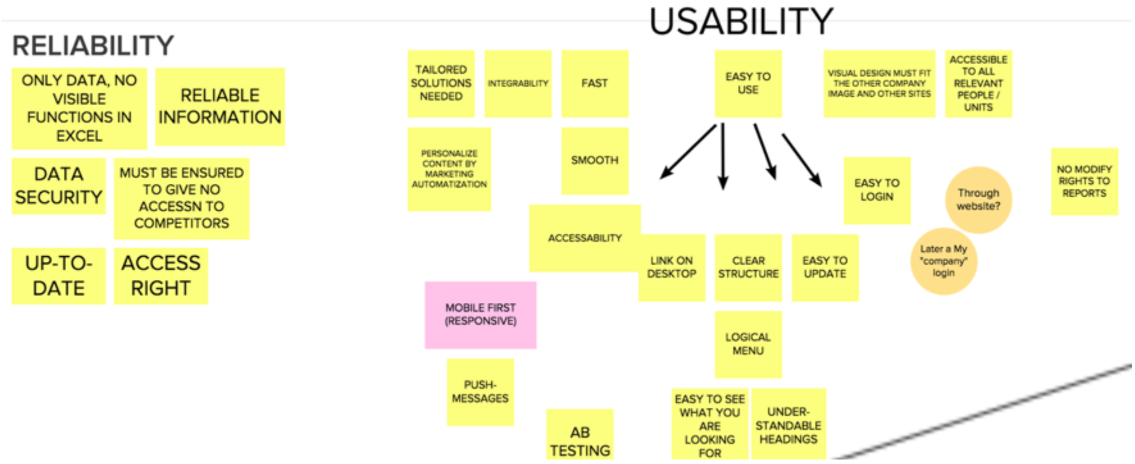
Appendix 10: Internal interview Empathy map



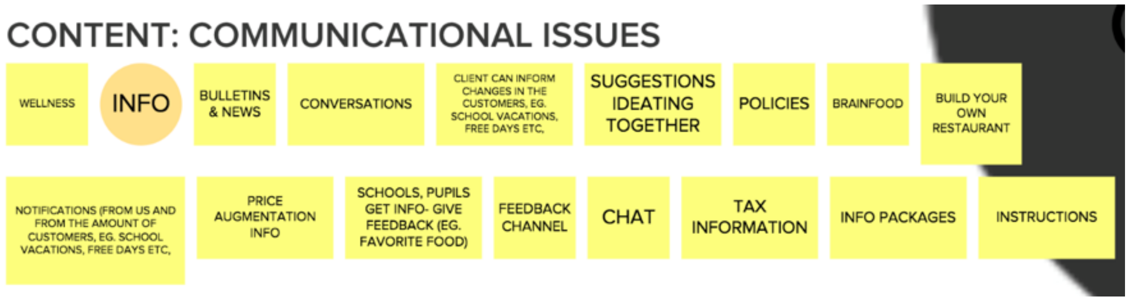

A) THINK AND FEEL/ PROJECT MANAGEMENT



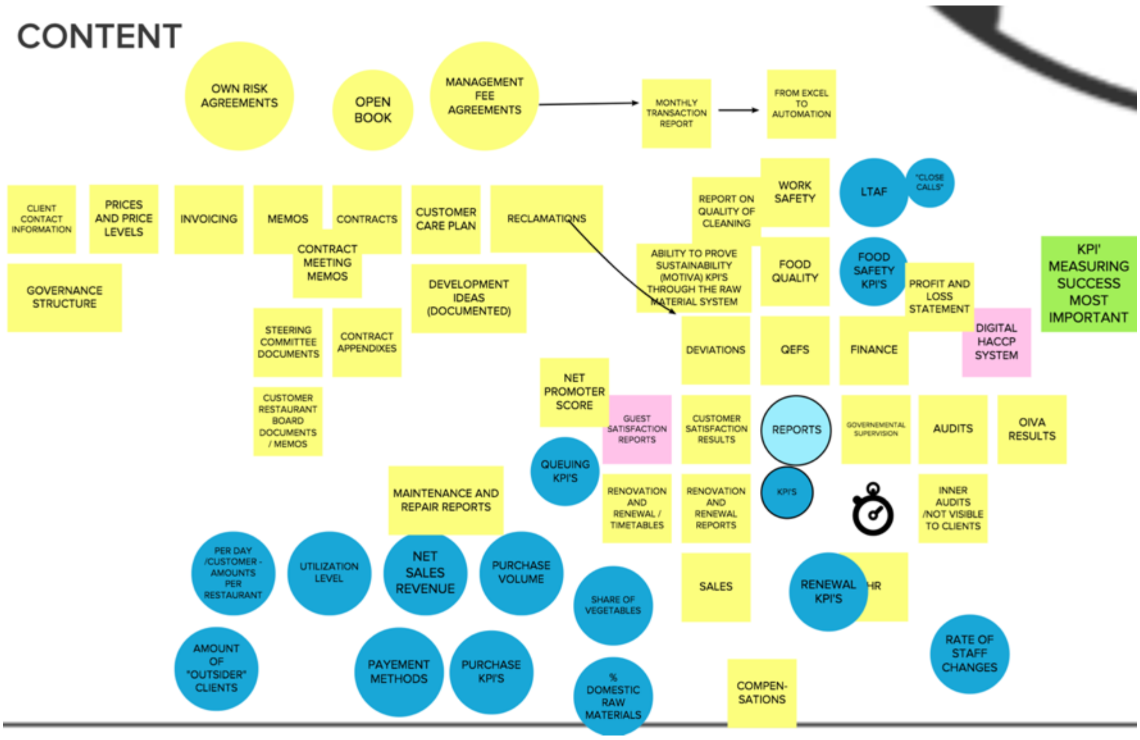
B) THINK AND FEEL / RELIABILITY AND USABILITY



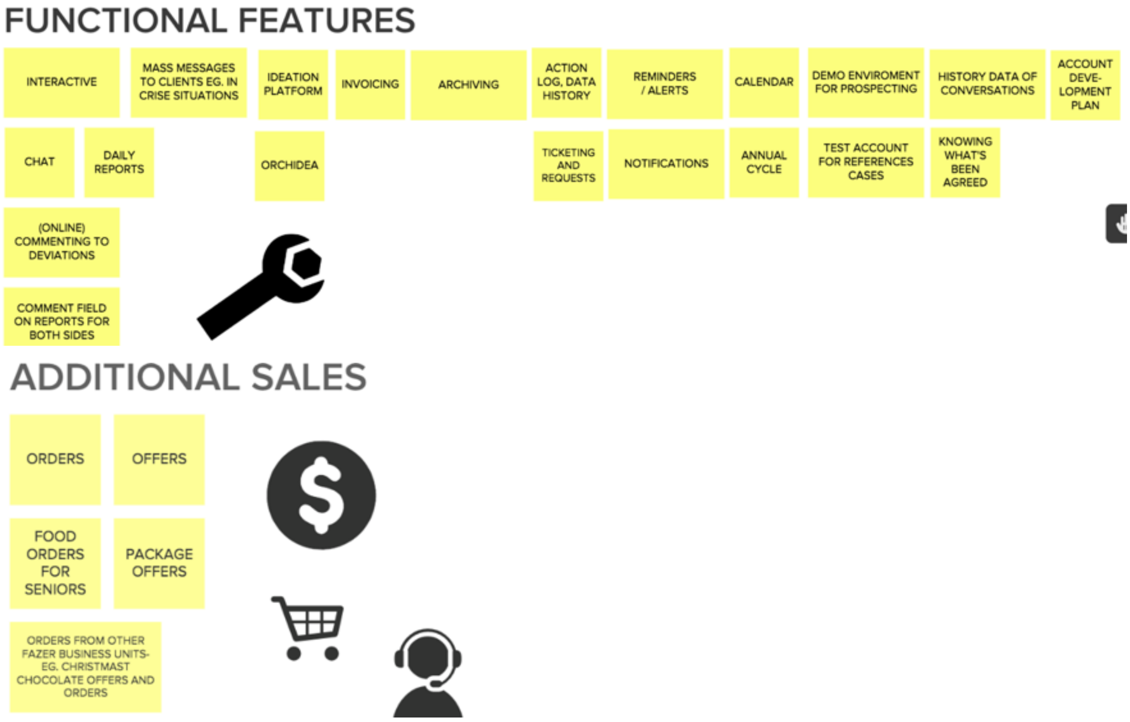

C) SAY AND DO / COMMUNICATIONAL CONTENT




D) CONTENT: ARCHIVE, REPOTS, KPI

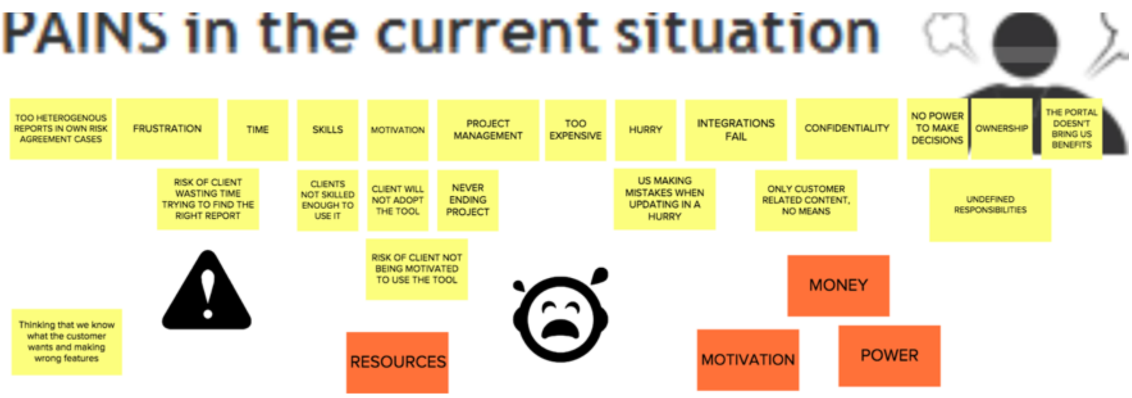


E) SAY AND DO / FUNCTIONAL FEATURES & CONTENT: ADDITIONAL SALES

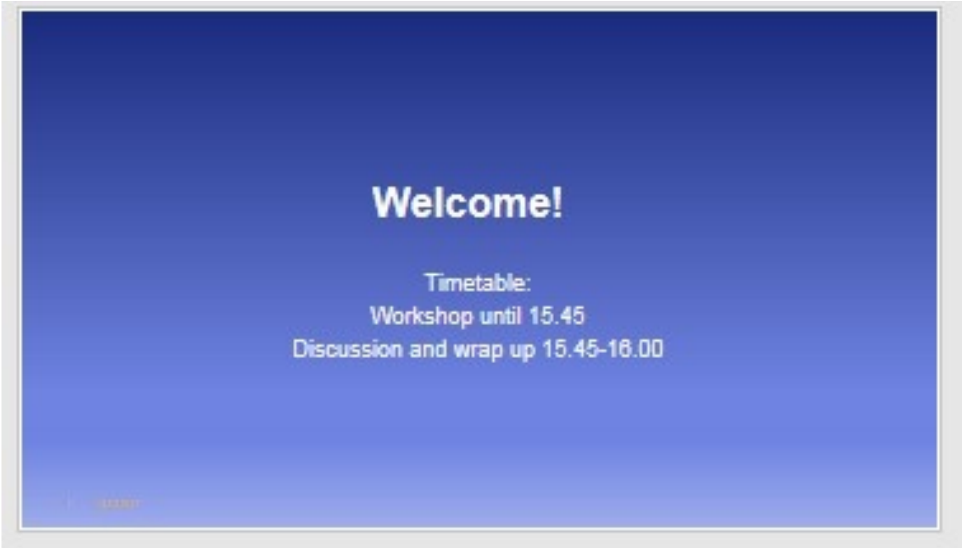


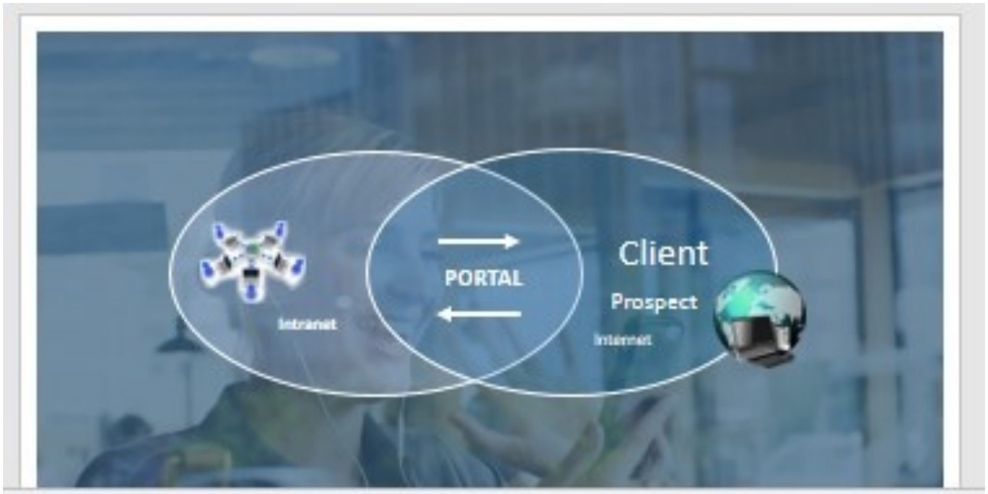

F) GAINS

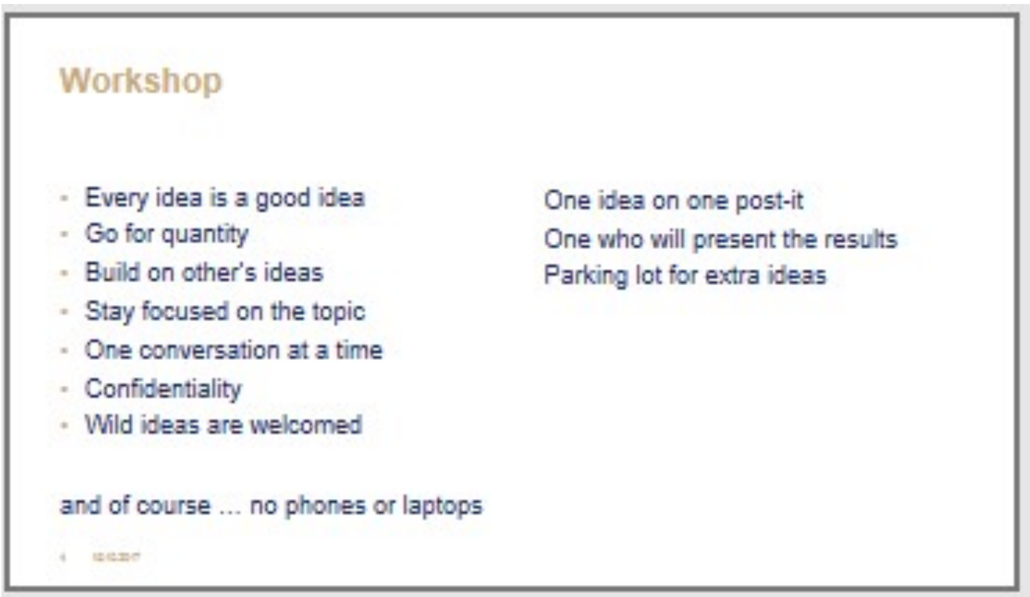

G) CHALLENGES



Appendix 11: Workshop 1 introduction slides and timetable



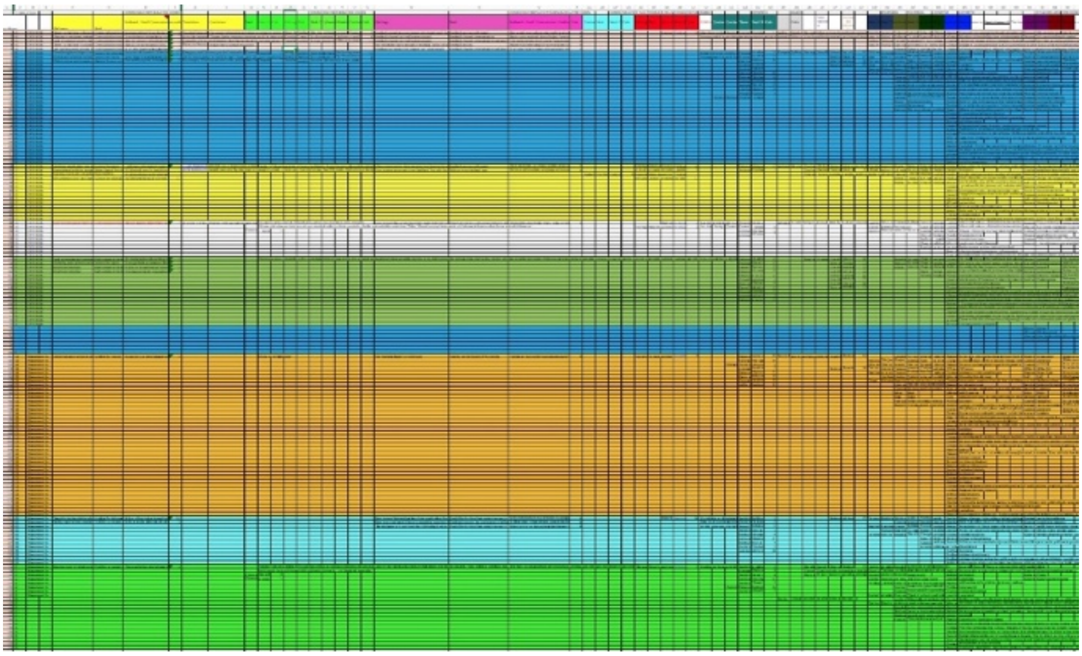



# Workshop 1, 3 groups (9 and more participants)

| | | Our needs & challenges | Client's needs & challenges | Stakeholder Map |
|---|---|---|---|---|
| 14.15-14.18 | Ideation alone | 3 minutes | 3 minutes | 3 minutes |
| 14.18-14.28 | Presenting your thoughts in your group | 10 minutes | 10 minutes | 10 minutes |
| 14.28-14.30 | Grouping the post-its | 2 minutes | 2 minutes | 2 minutes |
| | Change groups | | | |
| 14.30-14.35 | The "mapper" presents the results to the other group | 5 minutes | 5 minutes | 5 minutes |
| 14.35-14.38 | Ideation alone | 3 minutes | 3 minutes | 3 minutes |
| 14.38-14.48 | Presenting your thoughts | 10 minutes | 10 minutes | 10 minutes |
| 14.48-14.50 | Grouping the post-its | 2 minutes | 2 minutes | 2 minutes |
| | Change groups | | | |
| 14.55-15.00 | The "mapper" presents the results to the other group | 5 minutes | 5 minutes | 5 minutes |
| 15.00-15.03 | Ideation alone | 3 minutes | 3 minutes | 3 minutes |
| 15.03-15.08 | Presenting your thoughts | 5 minutes | 5 minutes | 5 minutes |
| 15.08-15.10 | Grouping the post-its | 2 minutes | 2 minutes | 2 minutes |
| 15.10-15.40 | PRESENTING THE RESULTS | 10 minutes | 10 minutes | 10 minutes |

Appendix 12: Coding client quotes in an excel sheet



| | CLIENT CODE | | | | | COMMUNICATION RELATED CODES | |
|---|---|---|---|---|---|---|---|
| sort alkuper | | | | Challenges | Need | Bottleneck / Need / Communication | eme code |
| 1 | A1 | OWN RISK | | There is a challenge to know | Contact information w | Sanotaan että meillä on aika is | 6 |
| 2 | A1 | OWN RISK | | Changes in restaurant oper | Communication proce | Et ravintolan avauksen kanssa | 2 |
| 3 | A1 | OWN RISK | | Lack of communication to t | Communication proce | Niin olis toivonut ehkä vähän e | 2 |
| 4 | A1 | OWN RISK | | There is a challenge to conne | Communication proce | Mun alla on ravintolapäällikköit | 2 |
| 5 | A1 | OWN RISK | | The communication process is | Communication proce | Se on ollut haaste koska sekä | 2 |
| 6 | B1 | OWN RISK | | Transforming knowledge to ne | Archive for informatio | Joo toi et väki muuttuu. Koska ka | 1,1 |
| 7 | B1 | OWN RISK | | Finding and archiving memos | Archive for memos | mutta sinne vois säilöä kaikki pö | 1 |
| 8 | B1 | OWN RISK | | Written notices and message | Material for copy-style | Kun meillä on jotain tilaisuuksi | 5 |

Appendix 13: Pains, challenges and risks

| | CLIENT QUOTES | COMPANY QUOTES | COMPANY ASSUMPTIONS |
|---|---|---|---|
| **COMMON CHALLENGES RELATED TO THE CURRENT SITUATION** | | | |
| **CHALLENGE NR 1: ARCHIVING DOCUMENTS AND BEING BURDENED BY EMAILS** | *"[...] major problems managing my emails [...] when I got back from my holiday, I had 909 emails. For sure some go unnoticed. Without a doubt it might happen that some are neglected [...] just for your supplier I have god knows how many folders for what goes where, where are the reports and this and that. We talk a lot using emails." (C1)*<br><br>*"That you wouldn't have to separately save using emails because that is pretty much pointless work." (H2)*<br><br>*"[...] information for calculating the lunch benefit, if I could quickly access it somewhere else, it woudn't have to be so that someone sends an email to someone else" (F1)*<br><br>*"[...] I wouldn't want the reports in paper form anymore. Because the paper ones fill up my folders." (G1)* | *"I think this is a good addition for us to be more digital as well because we are working a lot manually". (K)*<br><br>*"[...] now all of us have our emails quite full" (B)* | *"Making it faster that the client wouldn't have to go to his emails and wonder if that is the last one they've sent but that it would always be up to date, easy to access." (B)* |
| **CHALLENGE NR 2: TRANSFERRING KNOWLEDGE TO OTHER PEOPLE** | *"The thing that people change. Because not everyone remembers what was agreed."(A1)*<br><br>*"If the person changes, even if I were to dump all the emails to someone else, they couldn't make head or tail of it."(C1)*<br><br>*"[...] that we ourselves would be able to get it somewhere and wouldn't always have to contact the restaurant manager and say hey we need this or that" (E1)* | *"[...] if there is a change in personnel on either side, the new ones know what was agreed the last time" (workshop)*<br><br>*"[...] because it happens that sometimes we have a version that the client doesn't. If there is a change of personnel, there might be a conflict related to which one is the correct version." (E)* | |

| | | | |
|---|---|---|---|
| **CHALLENGE NR 3: UNCLEAR COMMUNICATION - PROCESS AND CHANNEL** | *“It has been a challenge [...] a creative or actually controlled chaos to convey the message so that it goes directly from the restaurant to the users and then from us to the supplier that something for the contract contact person and from there something to us that doesn’t work well at all with a mass like this.”(A1)*<br><br>*“Perhaps I would have wanted a bit more information about its status so that I myself could communicate it to others. [...] If you say that hey we’re first trying this out a bit and then full blast after a month, when you tell people that, they say that’s really great. But if you don’t communicate at all you might get quite harsh feedbrack right from the start and then it is really hard to change it afterwards.” (A1)* | *“I’ve noticed [...] that they don’t share any information unless it is something acute [...] they could provide something that would help me so that I would know that something like this might on its way [...] a couple of times I’ve been like “oh really, has this been already discussed somewhere” [...] but for everything to go smoothly, it’s better that you know enough and not too little.” (I)*<br><br>*“[...] the email chat history also diverges and someone is left out etc.” (workshop)* | |
| **CHALLENGE NR 4: CHALLENGE OF KNOWING WHOM TO CONTACt** | *“[...] sometimes you just don’t know who to contact, is it someone like the restaurant manager or from somewhere else” (A1)* | *“[...] It would be ideal. Then you wouldn’t ever have to ask around for them.” (F)* | *“That if you need some information right away, where are you going to find it if you can’t reach the account manager.” (C)* |
| **CLIENT’S CHALLENGES RELATED TO THE CURRENT SITUATION** | | | |
| **CHALLENGE NR 5: KEEPING TRACK OF PLANS** | *“I’ve found the annual calendar very challenging [...] that in addition to other work you would keep your finger on the pulse of everything.” (I2)*<br><br>*“The annual calendar is a good idea because some things are just that a lot of ideas are thrown around and they are just dead ducks and then they just won’t go away.” (B1)*<br>*“[…] if I get the feedback and then I discuss it with my contact persons, the feedback might never be truly implemented in the restaurant.” (A1)* | | |
| **CHALLENGE NR 6: FEEDBACK**<br>**1. Actions following the feedback are not transparent enough. There is not a way to proof the steps already taken**<br>**2. How to see feedback trends? Cumulations?**<br>**3. Contract person is an extra loop**<br>**4. Once a year survey is too heavy** | *“[…] the person giving the feedback will feel that his feedback is not dealt with unless they get some response and then his experience is a little like nothing was done about it.” (A1).*<br><br>*“And then they pile up over time and are forgotten there when new ones come along” (H1)*<br><br>*“[…] customer satisfaction and escalating or ongoing situations that threaten customer satisfaction.”(F1)*<br><br>*“No matter if it’s good or bad, they’ll send it to my email and then I have to convey the message to the account manager no matter what it is. And I send the same complaint to the account manager in writing.” (C1)*<br><br>*“Because the big one is once a year, it’s quite heavy. And then people access it online and pour out everything and I see that I have five, six dense pages where they have offloaded everything like it was too salty last week. It’s a bit too heavy to go through afterwards. And the people who answer are the active ones, and the ones that were happy won’t say anything.” (G2)* | | |
| **COMMON CHALLENGES RELATED TO THE PORTAL** | | | |

| | | | |
|---|---|---|---|
| **CHAL-LENGE NR 7: ENGAGING US-ERS AND MOTI-VATING** | *"The risk is that if it is not used enough then in practise things will flow some other way and then it won't really be of any importance" (H2)* | *"[...] That if we create a system that no one will use, it'll be a waste of time and money." (E&F)*<br>*"The challenges include engaging users, both parties, that ensures that it will really be used"(workshop)*<br>*"And as we have an ex-cess of system here, it might be difficult to make people excited about it." (D)* | |
| **CHAL-LENGE NR 8: CONFIDENTIAL-ITY** | *"Because with us everything has to be so extremely safe, you have to find out how it will relate to our data sys-tems."(D1)* | *"Data protection, how will we make sure that we don't send wrong in-formation to the wrong people." (E&F)* | *"What is the client challenge we're trying to address [...] I think it's about being reliable and up to date, easy, quick." (B)(combined to the one below)* |
| **CHAL-LENGE NR 9: HOW TO MAKE THE PORTAL ENOUGH SIMPLE** | *"Whatever the system will be, if it doesn't work well, people won't use it. Then they will get the information some-where else." (I2)* | *"It should not be too complicated. And single log-in" (WORKSHOP)* | *"And of course, if it is not easy, quick and safe from the client's perspective, it will die on the vine." (A)* |
| **COMPANY'S CHALLENGES** | | | |
| **CURRENT CHALLENGE IN REPORTING RELATED TASKS** | *"I've received feedback from the business side that doing the maintenance fee reports is la-borious." (H)* | | |
| **RISKS IN THE PORTAL SYSTEM AND ITS PROJECT** | | | |
| **LOOSING THE PESONAL TOUCH** | *"You should not talk about any extranet or portal but about to keep the service personal. We should not talk about support service but about people [...] This is a tool and it won't re-place people. The client and we are heavily dependent upon persons." (workshop)* | | |
| **TOO MUCH SYSTEMS** | *"I think this is always our besetting sin [...] we start with the tool when we should take a look at the entire service process in general to see how it really works." (D)*<br><br>*"But I don't think that at least now the ground is particularly fertile for a new tool because lately we've had a lot of new tools and they've come in the midstream [...] My guess is this is not something our people have been dying to get their hands on. And if the clients had asked for this, we would already be doing this." (D))* | | |
| **THINKING WE KNOW WHAT THE CUSTOMER WANTS** | *"[...] we imagine that the clients need all sorts of things, but we forget to ask them if this is what they wanted [...]" (C)* | | |
| **NOT TRYING TO MAKE EVERY-THING READY AT ONCE** | *"Sometimes we have the habit of trying to create a perfect world, but we can never finish it [...]" (H)* | | |
| **DATA IN REPORTS MUST BE CORRECT** | *"[...] the content must be accurate and high quality. If the content is not reliable it will be-come insignificant. People will expect the same information and similar reports some other way, if it doesn't work on the portal [...]" (A)* | | |
| **UNIFYING TAILORED REPORTS** | *"When it comes to reporting these own risk contracs, nothing is the same in two places, and here we have a situation where we have 100 different client reporting stardards that we've been doing and harmonizing them would be mission impossible." (H)* | | |

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| **MANAGING THE PROCESS**<br>- **WHO MAINTAINS THE PORTAL?**<br>- **SYSTEM INTERFACES AND INTEGRATIONS**<br>- **RESOURCES**<br>- **OWNERSHIP OF THE PORTAL**<br>- **OTHER SYSTEMS FAIL**<br>- **WHO CREATES USER RIGHTS?**<br>- **WHO PAYS?**<br>- **WHO ANSWERS TO THE CHAT?** | *"[...] information would be entered in the system only once and it would have a clearly defined owner and access rights, resources and responsibilities, interfaces and integrations with other systems and administration, which is a challenge, too. It will have a support function and it will be developed continuously and it will be monitored continuously. (workshop)*<br><br>*"[...] often what happens is that we get all worked up and create a service and after the first version everyone moves on to do something else and it is abandoned and after a year we're like wait a minute, no one has kept track of it and is it working and why is it not working. [...] Business ownership is really important that the solution will have a person who is in the business and has the will and the motivation and the responsibility and the power to develop it and to take it somewhere [...]" (G)*<br><br>*"The challenges include money, the schedule and resources.  Do we have the know-how, is there a supplier." (A) /"One challenge is who will pay for it." workshop / " [...] how will we generate the information for it, does it involve a lot of manual labour and who will create the content. What is the timeframe." (A)*<br><br>*"Then there are intergrations, those have to work." (A) /"This will have its challenges, do the existing systems need to be improved because of this?" (workshop) / "[...] it will be expensive, and it will drag on and in the end no one will need it and it won't be linked. We always talk about how information streams here but that is not how it goes." (D)*<br><br>*"Does chat mean that I should be constantly following it and be online [...]" (workshop)* |

Appendix 14: Think and feel quotes

| CATEGORY | CLIENT QUOTES | COMPANY QUOTES | COMPANY'S ASSUMPTIONS |
|---|---|---|---|
| **GENERAL FEELINGS AND THOUGHT** | | | |
| THIS WOULD ACT AS A PORTFOLIO | *"I'm just thinking about the ideal. That whenever I'm wondering about something that involves the restaurant I would just access the extranet page and all of it would be there gathered in a single place for me"(G2)* | *"The connecting factor would be a client dialogue forum." (workshop)* | |
| **POSITIVE INTEREST** | *"Let's just say that this came just at the right time [...] It would be fantastic that you would have an extranet. What is your schedule? We definitely want to try out the prototype. For long, this has been a flaw in the process [...]" (E1)*<br><br>*"And I would love to get to see the first preliminary lay-out to sort of see what there could be. The elements and features. It is really great that something like this is in the works." (G2)* | *"I think this is a good addition for us to be more digital as well because we are working alot manually and we do a lot of manual work. And this could ease these kinds of things a little bit. That's a good thing." (K)*<br><br>*"It is true that you need some kind of a tool to manage the supplier relationship, to develop it, to sustain it. There is a way to get together to talk about it and to cooperate and to build the customer relationship and the processes we have together, possibly reporting, too, in the future." (A)* | |
| **A PLACE TO SHARE INFORMATION BETWEEN ALL RELEVANT UNITS / PEOPLE** | *"You also need to involve the restaurant manager's knowhow. In the entire dialogue and planning." (F1)* | *"[...] a place [...] so that all of his units see [it] and the people the information concerns." (D)* | |
| **NON-FUNCTIONAL FEATURES - FEELINGS AND THOUGHTS** | | | |
| **RELIABILITY** | | | |
| **<u>BOTH</u>: RELIABILITY IN GENERAL** | *"Of course, reliability is one." (H2)* | *"Easy of use, timeliness, security. The information is there when it was promised it would be there [...]" (A)* | |
| **<u>BOTH</u>: DATA SECURITY & ACCESS RIGHTS** | *"Again the data protection of companies." (G2)* | *"Definitely the kind that you can do that there aren't our calculation formulas on the background [...]" (H)*<br><br>*"Data protection - that how do we make sure that wrong information is not sent to the wrong people." / E*<br><br>*"If there are things like contracts we of course have to make absolutely sure that you can't log in there. Meaning that the competitors couldn't take a look." (B)* | |

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|---|---|---|---|
| **<u>COMPANY:</u>**<br>**RELIABLE**<br>**UP-TO-DATE**<br>**DATA** | | *"[...] the accuracy of information starts with the restaurants - if we're talking about sales figures, they have to be accurate so that we won't give wrong information to the clients." (A)* | *"Timeliness, the right content, reliability. The clients want the KPI data that are reported there." (A)* |
| **USABILITY** | | | |
| **<u>BOTH</u>:**<br>**TAILORABLE** | *"[...] a customer profile designed for you with the things that really might interest you." (A1)*<br><br>*"[...] will then be customized according to the needs" (F1)* | *"Would it be possible to choose separately for each client that this type of clients will have these four features and those will have only 2" (G2)*<br><br>*"So it needs to be some kind of tailoring" (K)* | *"And because of that it has to be flexible because presumably not all clients are interested in the same things, so it will have to have the ability to flexibly address the challenge of providing the option of creating reporting templates and platforms that resemble the client." (A)* |
| **<u>BOTH</u>:**<br>**REAL TIME** | *"Well, real time data is always a virtue in everything [...]"(H2)* | *"[...] Yes, having real time data is a good thing because without it this wouldn't necessarily provide a competitive advantage like we thought it could." (workshop)* | |
| **<u>BOTH:</u>**<br>**INTEGRABILITY** | *"[...] open so that it will be easy to integrate with other systems." (A1)* | | |
| **<u>COMPANY:</u>**<br>**DATA FILLED ONLY IN ONE SYSTEM** | | *"[...] that information would enter the system only once." (workshop)* | |
| **BOTH:**<br>**<u>EASY TO USE</u>**<br>**- SMOOTH & FAST**<br>**- EASY ACCESS**<br>**- SIMPLE**<br>**- CLEAR STRUCTURE**<br><br>**CLIENT:**<br>**- LOGICAL NAMING**<br>**- GUIDING**<br>**- SEARCHABILITY**<br>**- FRONTPAGE SHOWS ALL NOT TOO COLOURFUL**<br><br>**COMPANY:**<br>**- EASY TO UPDATE** | - *"[...] the navigation is quick" (G2)*<br>- *"Ease of use: but it is really about easy access" (B1)*<br>- *"Surely everyone hates millions of passwords" (H2)*<br>- *"Clear, not too much information" (A1)*<br>- *"The less there are paths. The straighter and shorter the way - that is usually pop. (I2)*<br>- *"Logical" (B1)*<br>- *"Easiness [...] for me it is [...] that in a way if there is something, it will then guide you on how you can then go forward" (D1)*<br>- *"That easiness is actually about the visuality." (G2) / "[...] that there isn't too much, that there aren't too many pictures that make it colourful" (G2)*<br>- *"[...] Naming things so that how you will then find them." (I2)*<br>- *"And a terribly good search function." (I2)*<br>- *"I think the thing that it is clear-cut. I like that there is a front page, you can find everything there and can then proceed from there." (D1)*<br>- *"What is easy to use? Well, actually it is the first view" (G2)* | *"A clear structure" / (B)*<br><br>*"Easy enough and such that information can be found easily. Easy to access. You have the link ready somewhere and technical identification is easy and also that the portfolio is well built inside the portal. The right headings and probably topic by topic." (B)*<br><br>*"Easiness is a word that many seek - how something could be done even easier, so that I wouldn't have to spend my valuable time on it but it would go like this." (C)* | *"I would say easiness - that the client can find in a single place the information we have agreed on that we deliver to them." (A)*<br><br>*"That when the client himself has to do it, it has to be easy." (C)*<br><br>*" [...] with a service like this the usability is much more important than whether it is wonderfullly inspiring [...] that when they are interested in getting the report or comment out, it is much more important that it is simple." (G)* |

# Appendix 15: Company thougts and feelings

| A) COMPANY THOUGHTS AND FEELINGS | |
|---|---|
| **IDEAS IN GENERAL** | |
| **A PLACE FOR ROUTINES** | *"all this type of development to develop the customership should be agile [...] this would include the routines." (workshop)* |
| **PORTAL PROJECT RELATED THOUGHTS** | |
| "[...] money, schedule and resources. Do we have the know-how, is there a supplier that has been chosen, or does the IT have the know-how. That you have to have a tool that is truly ready."(A)<br>*"And if interfaces are built later on, that the information will come from our other systems there - that there are the integrations and those have to work." (A)*<br>*"[...] I would think about what the MVP would be. What is t the thing that you dare to introduce so that it would be smart for the client and for us and could be realized as quickly as possible. The minimum that can be used and then it is always easier to go there" (G)*<br>*"The right kind of marketing" (G)*<br>*"That if you want to create an extranet service like this and then the other business units will want" (G)*<br><br>CHOOSING THE RIGHT PEOPLE ON BOARD, CHOOSING THE RIGHT MVP, CHOOSING THE RIGHT SUPPLIER KNOWING THE NEEDED SYSTEMS & INTEGRATIONS, CHOOSING THE RIGHT PLATFORM, TIME MANAGEMENT, COMMUNICATING & MARKETING, SHOULD THE PORTAL BE FREE FOR CLIENTS, LICENCE COSTS, SCALABLE FOR OTHER BUSINESS UNITS | |
| **PORTAL GOVERNANCE RELATED THOUGHTS** | |
| *"[...] a clear owner and access rights, resources and responsibilities, interfaces and integrations with other systems and administration, which is a challenge, too. It will have a support function and it will be developed continuously and it will be monitored continuously." (workshop)*<br>*"The information that themselves would want to have there. Access, who can go there and who can see it. Needs to be restricted with access rights and made possible, secure and easy." (A)*<br><br>DECIDING THE BUSINESS OWNER OF THE PORTAL, SETTING UP A PORTAL DEVELOPMENT TEAM SETTING UP A MAINTENANCE TEAM, USER RIGHT SUPPORT, CONSTANT FEEDBACK FOLLOW-UP ESTIMATING THE UPDATE AND DEVELOPMENT COSTS | |

| B) COMPANY'S THOUGHTS AND FEELINGS FOCUSED ON CUSTOMER CENTRICITY | |
|---|---|
| **WE SHOULD DISCOVER WHAT IS ADDED VALUE TO THE CLIENT** | *"[...] you have to think what adds value to them" (workshop)*<br>*"What will the clients use it for, how will this make their lives easier - that will then tell us how we should prepare and what information we should include there."(C)*<br>*"Based on the clients' needs" (A)* |
| **CLIENT IS INVITED TO DEVELOP WITH US** | *"Together with the client we would look at what information they would want on the portal at the start so that we would be able to increase the utilisation rate." (B)* |
| **CLIENT MUST BE INTERESTED TO USE THE TOOL** | *"If we go through the trouble ofcreating a portal, everyone should be encouraged to provide information and the client would be willing to use it, too." (B)* |
| **CLIENT NEEDS TIME TO LEARN THE TOOL** | *"The clients need to be trained for it" (workshop)* |
| **TESTING WITH CLIENTS** | *"[...] that we have a couple of suggestions here - in your opinion, what would be the positive and the negative aspects. It is just cheaper to conduct the enquiry when they have not been coded yet." (G)*<br><br>*"[...] how it could be used as easily as possible, for example, with just one client or two clients or in some processes - to try and run it in." (G)* |
| **CONSTANT FEEDBACK** | *"[...] and it will be developed continuously, and it will be monitored continuously (workshop)* |

Appendix 16: Say and do

| CATEGORY | CLIENT QUOTES | COMPANY QUOTES | COMPANY'S ASSUMPTIONS |
|---|---|---|---|
| **SAY AND DO**<br>Company:<br>*"[...] minutes of meetings should be one thing, annual plan - the things we are doing together with the client, different kind of KPIs that we can have some kind of pic and mix metrics and build up a dashboard - that this is for you - this is what you are requesting - if it is the amount of organic raw material, or waste numbers, or if it is something else. Reservation system and invoicing system - that's something else. That is some kind of integration with the catering order system. The contract information already in CRM." (K)*<br>*"Even if it would be included in the beginning only the agreements, reports and contact information and a small news bo, it might provide a good start and it might well already meet some needs." (G)*<br>*"A common place where you can keep documents, have conversations, calendars and videos were mentioned there." (D)*<br>*"But the thing that if there is something topical and your imagery then otherwise itcould be quote plain. So, in the end, that it is a link and here is an attachment and then you have the chat section." (G2)* | | | |
| **CONTENT: MATERIAL BANK** | | | |
| **<u>BOTH</u>**<br><br>**CONTACT INFORMATION:**<br>**- COMPANY**<br>**- CLIENT**<br>**- REFERENCES**<br>**GOVERNANCE STRUCTURE** | *"It's always good to have contact information." (I2)*<br><br>*"Actually, it would be a really good thing that you could always pick the right contact persons [...] sometimes you just don't know who to contact, is it someone like the restaurant manager or from somewhere else" (A1)*<br><br>*"[...] and then the contact information for your people- who is responsible for the customer account above the operative customer that if I have something I need to discuss, and I need to contact you, who that is, in other words the contact information." (G2)* | *"[...] contact information updates will be sent if they change [...] Ideally, the people themselves would update them [...] Then you wouldn't ever have to ask around for them." (E&F)*<br><br>*"[...] the Governance Structure today." (K)*<br><br>*"[...] opening times [...]" (I2)* | *"Perhaps sometimes the client is not sure who to contact. But in that case he could call the customer relations representative." (G)* |
| **<u>BOTH</u>**<br><br>**ARCHIVE:**<br>**- REPORTS**<br>**- INVOICES**<br>**- CONTRACTS**<br>**- CONTRACT APPENDICES**<br>**- MEMOS**<br>**- SERVICE LEVEL AGREEMENTS**<br>**OTHER DOCUMENTS** | *"Responsibility for maintenance and reporting. We require reports on sales, the number of transactions, the number of visitors, the amount of waste food" (A1)*<br><br>*"It would be nice to see the invoicing period and when it will be due and has it been paid and why not. And budgeting otherwise, too [...]" (B1)*<br><br>*"The information is in one place and I don't have to wonder if this is said here or there and everything can be found in a way along the same path. That is truly important" (H2)* | *"The customer committees' meeting minutes could be there. All such documents related to the customer account would be stored there in one place. Who from the customer account would have access to the portal and to what information - the customer committees' meeting minutes, things like memorandums or some steering group business or just some contract stuff. (B)*<br><br>*"This would be an excellent way to store and archive information, we talked about a library [...]" (workshop)*<br><br>*"[...] because of the steering groups and committees,* | *"All reporting discussed during the client's contract negotiations, what the client then files somwhere for himself. The client should be asked how many and for what purpose the client would need this. For example, some reports. Could this be that kind of place, because he might have a place where he keeps it so that all his individuals could see it and people the information concerns. Could this be the place? Perhaps it can be." (D)*<br><br>*"Perhaps you could find invoices and invoice attachments there, too. The client could ask the* |

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| | | *there the development ideas. Even if they were not accepted, they would remain as documents in the library and if necessary, they could be dug up and edited a bit. And they would also remain as a verification that they have been presented." (B)*<br><br>*"Agreements, reports and sales figures from both sides, feedback and what not" (D)* | *system why do I have this invoice" (workshop)* |
| **BOTH:**<br>**MATERIAL BANK:**<br>**- BULLETINS & NEWS**<br>**- SALES & MARKETING MATERIAL**<br>**- POLICIES**<br>**- INFO (E.G.PRICES)** | *"I mostly keep up with substantial changes in business that might affect us and our operations and concepts developed by us, too, and that we might be able to utilize in our communication and our own development projects." (A1)*<br><br>*"The most important news on the front page or somewhere." (C1)*<br><br>*"When someone asks you why does your restaurant do this and why is it done like this in our restaurant, I need the background information about how the menu is designed, where you procure goods, what are the principles of food preparation." (G2)*<br><br>*"[...] everything supporting the sales and marketing [...] in addition to everything related to finances." (I2)* | *"[...] new things or news." (G)*<br><br>*"[...] all price increase materials could be there." (B)*<br><br>*"I would push through the communicational things and the features in general together with the marketing automation system because you can use it to send newsletters and text messages and you can also raise on the pages certain things in certain places, such as personalized content." (G)* | |
| **CLIENT:**<br>**- LOGO**<br>**- FLOOR PLAN**<br>**- INSTRUCTIONS**<br>**- INFO OF STAFF**<br>**- LUNCH & CATERING LISTS**<br>**- MATERIAL FOR ORGANISING EVENTS (PICTURES, IDEAS, INFO)**<br>**- FACILITY MAINTENANCE (EQUIPMENT INVENTORY, LIFECYCLE ESTIMATES FACILITY MAINTENANCE BOOK)** | *"Images with floor plans and [...] then of course the basic facts, i.e. what your company is and I've needed even the logo." (G2)*<br><br>*"For example, we've done it so that you have a specific plate and you take a photo of it so that if you have a Karelian rice pasty, is it big or small, and you get a photo of it instead of them just saing "a bread roll"." (B1)*<br><br>*Maintenance:*<br>*"If you see that, hey, they've had to repair this several times, you can see that "hey, I'll budget some more money for next year because it looks like it won't work much longer" (B1)*<br><br>*"One thing we use is these repairs [...] a repair log [...] because I can see directly from itwhat was ordered to this address or that address and what is the invoice" (I2)* | | |
| **BOTH:**<br>**FEEDBACK & SATISFACTION INFORMATION**<br>**- HAPPYORNOT RESULTS**<br>**- RECLAMATIONS** | *"It could be so that if there is something really acute, we would be alerted. I would want that to be the tool." (B1)* | *"Finances and customer satisfaction, meeting memos, and minutes of meetings." (E&F))* | |

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| - **GUEST SATISFACTION REPORTS**<br>- **NPS-SCORES** | *"I'm wondering about HappyOrNot, if it could be integrated in it" (B1)*<br><br>*"But on the other hand, if there were a new service or as the buyer of a new service, of course [...] you would have to see if complaints or other things accumulate there." (H2)* | | |
| **<u>COMPANY</u>:**<br>**ADDITIONAL SALES:**<br>- **OFFERS (PACKAGE OFFERS)**<br>- **ORDERS** | | *"A channel that makes it possible to close methods, materials as well as the sales case. It could be an opportunity that once you have closed a client deal or once the client account has been established, managing it there provides opportunities for add-on sales. Communication directly with the account manager or sales." (workshop)*<br><br>*"One idea was that we could sell for example expert services through it [...]" (workshop)* | |

Appendix 17: Functional features

| CATEGORY | CLIENT QUOTES | COMPANY QUOTES | COMPANY'S ASSUMPTIONS |
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| **FUNCTIONAL FEATURES** | | | |
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| **MOBILE** | *"And if the idea is to communicate faster, you should take mobile access into consideration with a view to the future. (H2)* | *"All the sites we build should be created in the spirit of "Mobile first" and as a rule they should be responsive" (G)* | |
| **DASHBOARD**<br>**- KPI'S**<br>**- ESTIMATES**<br>**- CHARTS**<br>**- STATISTICS**<br>**- FINANCIAL FIGURES** | *"But that's something that would definitely make it faster, if I could log in something [...] I would see for example a graph of how the sales have improved or the number of clients has decreased." (C1)*<br><br>*"[...] It would be really fantastic if I could receive the reports in one place and they would have been analysed, they would have been turned into graphs comparing, for example, the last month with rolling. Because that takes up a lot of m y time." (C1)*<br><br>*"If I were to, for example, open and see how the restaurant is doing, there would be columns for this year detailing the turnover and it could include, for example, how much it has cost per portion. You would immediately see the trends and directions. And the same graph would include the other most important factor, the material costs per portion and staff costs per portion. You would very quickly see what has happened. If the costs of materials or staff have started to increase." (G2)* | *"What the clients expect of us is based on the contracts. What quality indicators are reported to the client, that type of information. [...] QEFS, occupational safety and health, quality of food, how the staff is treated, sales data." (A)*<br><br>*"Different contracts define different things. Utilization rate, number of customers, turnover data, cash balance, open book, yes [...] There is a lot of data on the distribution of the turnover [...] how many transactions in total are there per restaurant per day [...] rental reports [...] things related to customer satisfaction [...] internal controls planning [...] repairs - if equipment have been repaired and operative things like that [...] contract appendices." (E&F)* | *"If the client buys food from us, the things that are the most important to them are the taste and safety [...] Of course they want the service to be smooth, quick and flexible [...] and that we can tell the clients that our client's customers don't usually have to queue any longer than this or that." (C)* |
| **AUTOMATED REPORTS** | *"if you could build a link in between so that they would be automatically updated in our systems at the same time."(A1)* | *"[...] management fee reports, that's something that could be automated" (K)* | |
| **TIME FRAMES SETTING** | *"Yes, it would be really cool that you yourself could print out the time period [...] So that you could then compare." (E1)* | | |
| **RESTAURANT ANNUAL CYCLE**<br>**- THEMES & EVENTS**<br>**- SPECIAL DATES**<br>**- HOLIDAY SEASON** | *"The annual clock - that you would have it running all the time and showing what coming up and what is currently happening" (I2)* | | |
| **CLIENT RELATIONSHIP ANNUAL CYCLE** | *"The annual calendar is a good idea because some things are just that a lot of ideas are thrown around and they are just dead ducks and then they just won't go away." (B1)* | *"To monitor and record the progress of development processes" (workshop)*<br><br>*"annual plan - the things we are doing together with the client" (K)* | |

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| **BRAINSTORMING PLATFORM** | *"One thing I would want more support with in the future is ideation." (G2)* | *"It could be an innovation tool from the client towards us" (workshop)* | |
| **CATERING ORDER SYSTEM** | *"[...] yes, definitely yes, come to think of it we should also transfer these reception rooms there, if possible. Then everything would be in the same place and work the same way. The same platform and the same way. It would be a good thing." (E1)* | *"It would be really cool to have there, for example, the room reservation systems [...] online channels in general." (workshop)* | |
| **ACTION LOG, REQUESTS & TICKETING**<br>**- FEEDBACK**<br>**- MAINTENANCE AND REPAIR** | *"Some kind of verification that the issue has been registered and taken into consideration." (A1)* | *"About ticketing, it occurred to me that [...] could they send requests or wishes a little like tickets? I mean that they should advance in the process." (G)* | |
| **NOTIFICATIONS, REMINDERS** | *"Could interaction be channelled there and you would get a notification saying now there is a message and then you could just click on a link to access the portal. And the change would then be saved there [...] It wouldn't necessarily fill up the email" (H2)* | *"[...] you would, for example, get a notification saying that "hey, you have now received this there and you can go there to view it, so that they won't get lost in the emails" (workshop)* | |
| **SSO** | *"Single sign-on. That is I wouldn't go there always because it's difficult because it has a password." (G2)* | *"And single log-in." (workshop)* | |
| **SEARCH FUNCTION** | *"And a terribly good search function." (H2)* | | |
| **OWN PROFILES** | *"[...] A client profile created for you with the things that might really interest you." (A1)* | | |
| **RESTAURANT SPECIFIC VIEW** | *"I would want the view to be restaurant-specific because so many of our units have such separate lives that they have to be treated as separate entities." (A1)* | | |
| **ABILITY TO UPLOAD AND DOWNLOAD DOCUMENTS** | *"If you, for example, finish a memo, you can then say that the memo is there but you won't have to attach it to it." (B1)*<br><br>*"If you could download the report from the portal." (E1)*<br><br>*"You should be able to export data in Excel or CSV format so that it could be then shared with others." (C1)* | | |
| **OFFER CREATION** | | *"[...] the place where the offer document was made [...] the place where the materials in general were made. Then it will always be there online." (workshop)* | |
| **DEMO ENVIRONMENT** | | *"And when making a sale, it would be good to be able to show that we have this kind of portal where you can see all the information [...] you make one test ID and put there a fake report or reports." (G)* | |
| **PROJECT MANAGEMENT TOOL**<br>**- OPENING PHASES**<br>**- TASKS**<br>**- RESPONSIBILITIES** | | *"[...] for a project management tool, if for example you are opening a new restaurant, each party involved in the project can access the tool together and make sure that it will include the status situation, all documents, schedules,* | |

| | | | |
|---|---|---|---|
| | | messages, communication." (workshop) | |
| **FUNCTIONAL FEATURES: COMMUNICATION** | | | |
| - **SAVED DIALOGUE** | *"Then it would save the history. And then I would remember that, for example, I asked the same question three months ago. In other words, a chat thing and if you did not have anything to chat about it would remain empty but it would stay in the archive"(G2)* | *"[...] the client has sent a message and has talked there which helps that information will remain saved in the same place." (workshop)* | |
| - **COMMENT FIELDS** | *"The ability to comment reports [...] for example when a restaurant manager would comment it by saying that these fluctuations or other things are due to this or that [...] that it would be saved as history there, it would make things easier, because later on when those are discussed if there are other people there." (I2)* | *"[...] one of the most valuable things we have in relation to customer care is that we don't just provide figures but we also comment the performance." (H)*<br><br>*"A place where the account manager could write comments. Would this be the place they could be documented in." (J)* | |
| - **EMAILS & MASS MESSAGES** | | *"We have this CRM connection with our email system. So sending an email to client we can actually connect it with the CRM" (K)* | |
| - **CHAT** | *"[...] a type of Yammer where you could write, i.e. communicate, for example with the operative manager. Hi, how are you doing, and these are now topical." (G2)* | *"Client communication, some type of messaging like chat or messenger, so that you would, for example, receive a message saying that the client has sent a message and has said there, which would then facilitate the information being stored in the same place." (workshop)* | |
| - **LOG OF SENT MESSAGES** | *"[...] it would be wonderful to have a log of to whom it was sent so that it wouldn't be sent again to the same one or something." (H2)* | *"Sometimes you want to store email and go back to the saved dialogue" (K)* | |
| **FEEDBACK CHANNEL** | *"The contract manager should be notified of smileys and free-form feedback. That would make things easier and save time for both. You could quickly look through it to see if there is anything alarming, you don't have to separately agree each meeting like hey, could we look through the customer feedback. And perhaps you could faster address them because there might be some that are due to us as a company, and not because of you. I always try to take care of them. For example something like "hey, we have a queue at the cash desk" could be because our stamping machine is out of order."(G2)*<br><br>*"Yes, I would absolutely assume that customer feedback were basic stuff for portals. Everyhing should be found there, if not online at least when one of those is put together [...] you would have to log in there, and there you could keep track of whether they have been processed and which of them have possibly lead to further measures and what has happened to with them. To think that we have a channel for providing customer feedback" (H2)* | | |

Appendix 18: Benefits

| CATEGORY | CLIENT QUOTES | COMPANY QUOTES | COMPANY'S ASSUMPTIONS |
|---|---|---|---|
| BENFITS | | | |
| ADDED EFFICIENCY IN DAILY ROUTINES | | | |
| ALL CLIENT DATA IS IN ONE PLACE EASY TO FIND FOR EVERYONE TO KEEP ON TRACK | *"The information is in one place and I don't have to wonder if this is said here or there and everything can be found in a way along the same path. That is truly important" (H2)*<br><br>*"[...] it would be really practical for me to get the reports directly from somewhere [...] and that they would be saved there for several years, months. That would be extremely good." (I2)*<br><br>*"[...] there would be a place where both parties could find up to date documents and the latest versions and agreements. We both could keep track of the current situation." (A1)*<br><br>*"It would be wonderful because the email inbox fills up all the time anyway - then you would know that they're there and you can find them there." (D1)* | *"[...] each party involved in the project can access the tool together and make sure that it will include the status situation, all documents, schedules, messages, communication" (workshop)* | *"The client doesn't have to take care of records, perhaps necessarily nothing "* (workshop) |
| SAME VERSION OF THE DOCUMENT IS ALWAYS AVAILABLE | *"[...] and that we would have a common one and we would know that this one is the most recent contract agreed on." (C1)* | *"The number of emails will have to decrease and that everyone will definitely have the same document. I would consider that the biggest benefit [...]" (D)* | *"[...] that you won't have to search your own emails [...] and wonder if that is the last one you've sent but that it would always be up to date, easy to access [...]" (B)* |
| TIME SAVINGS IN MANY WAYS<br>- Less archiving<br>- Less emails<br>- Shared dialogue with less need to inform others | *"It will ease and speed up my workload tremendously." (G2)* | *"[...] Of course it will save time." (B)*<br><br>*"It is important that it saves time and substantially reduces the need for manual work and speeds up the flow of information. It is important that when the person changes, the information is retained in the same place and it is not in emails but there." (workshop)* | |
| <u>CLIENT</u>: AUTOMATION E.G. LESS MANUAL WORK | | *"I think this is a good addition for us to be more digital as well because we are working a lot manually and we do a lot of manual work. And this could ease these kinds of things a little bit. That's a good thing." (K)*<br><br>*"The account manager gets it from portal X, saves it* | |

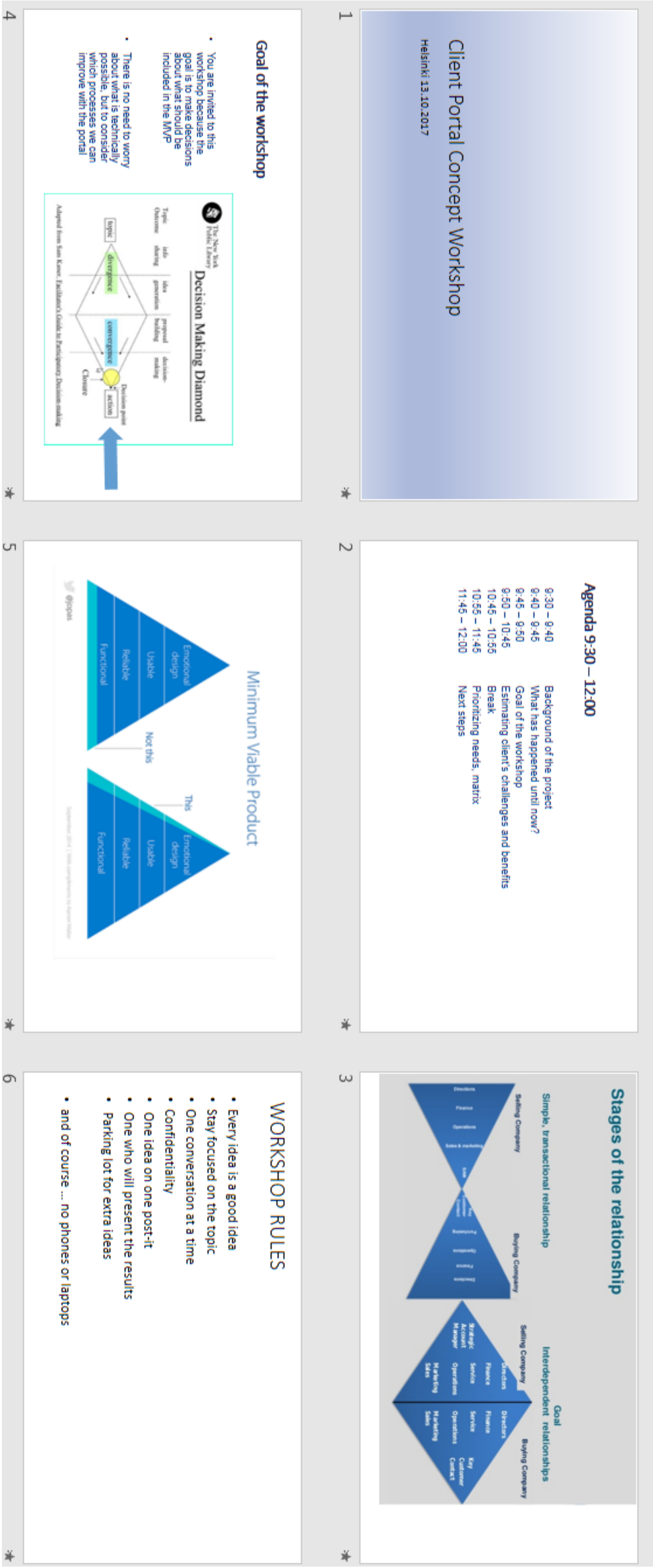
| | | | |
|---|---|---|---|
| | | *and emails it with comments to the contact person [...] in any case, you have analyse the results and send comments to the client but if you wouldn't have to spend time on the technical implementation." (H)*<br><br>*"When it comes to finances, we will start saving money when we are able to automatize the reports in the BI system [...]"(H)* | |
| **ACCESSIBILITY TO DATA 24/7** | *"It would decrease the restaurant manager's workload if we could print them out when we need them [...] it would also make feel less in a rush." (E1)* | | *"The client might want to view these things when we are not available." (workshop)* |
| **CLIENT: COMPACT PLACE TO MAKE A QUICK GLANCE OF THE SITUATION** | *"I'm just thinking about the ideal. That whenever I'm wondering about something that involves the restaurant I would just access the extranet page and all of it would be there gathered in a single place for me" (G2)* | | |
| **BOTH:**<br>**HELPS CLIENT'S DAILY WORK** | *"It would make the client's everyday life easier." (A1)* | | *"What will the clients use it for, how will this make their lives easier - that will then tell us how we should prepare and what information we should include there " (C)* |
| **COMPANY:**<br>**CRM USED MORE EFFICIENTLY** | | *"[...] motivate the account managers to add information to the CRM [...] we do a lot of manual work [...] this could ease these kinds of things a little bit." (K)* | |
| **ADDED EFFICIENCY IN COMMUNICATION** | | | |
| **CLIENT:**<br>**EASIER TO KEEP TRACK** | *"We would together keep track of the current situation." (A1)*<br><br>*"The annual clock is a good idea because some things are just that a lot of ideas are thrown around and they are just dead ducks and then they just won't go away." (B1)*<br><br>*"That kind of annual planning that if you have theme [...] you would be able to see it there. You do talk about them and enter them in the minutes of the meeting but then you have remember them and take them into consideration and write them down elsewhere [...] and you won't have unnecessary overlapping." (H2)* | *"[...] something beneficial to me could come from it so that I would know that something like this might be coming up." (I)f* | *"You can* ***monitor*** *and record the progress of development processes" (workshop)* |
| **EASIER TO FOLLOW CLIENT DIALOGUE AND DECISIONS** | *"[...] but also that it would always leave a mark so that you would remember a year later, too, that this is what we talked about" (B1)*<br><br>*"[...] it would be really practical if it would be written there and then the restaurant manager or I could forward it but* | *"[...] every day you have to manage it like that but for everything to go smoothly, it's better that you know enough and not too little." (I)* | *"From the customer, too, that there would be continous interactive dialogue, so that they, too, could directly - if they're not happy with something - put it there and we would take care of it." (workshop)* |

| | | | |
|---|---|---|---|
| | *that both would sort of seewhat was sent - it would be wonderful to have a log of to whom it was sent so that it wouldn't be sent again to the same one or something. Now it is done so that you email it and you see on the address field all those to whom it was sent. And then you'll have to dig through the emails to see what was sent, when it was sent and to whom." (H2)* | | |
| **SIMULTANEUOUS DIALOGUE WITH ALL PARTIES** | *"In my opinion this is the most important thing [...] yes, then of course communication with the account manager and possibly with the restaurant managers. If they have access to it, then you hit two birds with one stone" (H2)* | *"Then you'll have the chat history there, too, that diverges in emails and someone is left out etc." (workshop)*<br><br>*"Some sort of direct channel between the end users, the restaurant and in-house people for communication and for providing feedback and for relaying requests so that they could perhaps a little more efficient." (A1)* | |
| **EASIER TO KNOW WHOM TO CONTACT** | *"[...] it would be really great [...] the contact information for or the organization of key persons, because in a large company those change, too, and responsibilities change and then you would have a place where you would have the contact information at your fingertips. It is true you usually have them on your phone but they might change and stuff [...]" (B1)* | *"[...] Ideally, they themselves would update them [...] Then you wouldn't ever have to ask around for them" (E&F)* | |
| **EASIER TO SHARE INFORMATION E.G. WHEN PEOPLE CHANGE** | *"[...] if someone suddenly asks for something or wants something or people change or something else [...]" (I2)* | *"All reports, instructions, notifications related to the customer account can be found directly there regardless of whether the account manager or the restaurant manager has changed [...] That's how you find the history." (B)*<br><br>*"Having everything in an agreed place is a benefit as such. No one has to keep track and regardless of changes and other things the data will be available to people." (H)* | *"The benefit would be that you would have information saved there in case people change" (workshop)* |
| **POSSIBILITY TO FOLLOW NEW THINGS HAPPENING IN THE COMPANY** | | | |
| **ACTS AS A TESTIMONIAL OF OUR COMPENTENCE** | | | |
| **COMPANY: SHOWING THAT PROMISES ARE KEPT - TRANSPARENCY** | | *"[...] this is some kind of a hygiene factor that this is what they are promised, this is what we are doing and about transparency to the client - and that's good." (K)* | *"to show the client that after that day, the product and service are what they ordered, to track that." (C)* |

| | | | |
|---|---|---|---|
| **<u>COMPANY</u>: ABILITY TO PROVE PERFORMANCE BY KPIS** | *"But that's something that would definitely make it faster, if I could log in something and I would see the old ones and I would see for example a graph of how the sales have improved or the number of clients has decreased. [...] To me, that would be the great thing about it." (C1)* | *"The idea we've had is that it would add value, especially to the clients, too [...] then we could say that we provide the client with, for example, a percentage of domestic raw materials or a share of organic raw materials." (J)* | *"A financial interest at least in the maintenance unit, I'm sure. Let's say that our proportion of domestic meat is X %. And so that this would be done so that you can review this every month in our data. Of course that would be interesting to the buyer. It's more about credibility and being able to really monitor what we are doing." (J)* |
| **<u>BOTH:</u> NEW CONCEPTS, DEVELOPMENT AND RENEWAL** | *"I mostly keep up with substantial changes in business that might affect us and our operations and concepts developed by us or the entire campus, and that we might be able to utilize in our communication and our own development projects." (A1)* | *"It is true that you need some kind of a tool to manage the supplier relationship, to develop it, to sustain it." (A)*<br><br>*"Do we have any information that we can't put on our public website but want to share with the clients?" (B)* | |
| **FINANCIAL BENEFITS** | | | |
| **<u>CLIENT:</u> BETTER PREDICTION AND BUDGETING** | *"[...] there would be clear data or some diagrams showing, for example, that some costs have started to increase or the number of visitors has started to decrease. In the maintenance unit, we do have a certain level of costs and or the margins start to decrease and it is true the reaction time could change. But looking at individual monthly reports" (H2)*<br><br>*"[...] it is a win-win if we can better forecast the number of visitors, then you won't have to buy so much raw materials, you won't have to make so much food and then there won't be wastage for which you have to pay waste charges" (B1)*<br><br>*"If you see that, hey, they've had to repair this several times, you can see that "hey, I'll budget some more money for next year because it looks like it won't work much longer" (B1)* | | |
| **<u>COMPANY:</u> FOCUS WORKHOURS AND RESOURCES TO KEY TASKS BY E.G. AUTOMATION** | | *"Yes, but it'll be useful just to be able to put there Excels and reports [...] I would say that in this respect, too, the savings relate mostly to the account management." (H)* | |
| **<u>COMPANY:</u> ADDED SALES - A CHANNEL TO TARGET CURRENT CLIENTS /SECTORES** | | *"[...] that this way we could also sell" (workshop)*<br><br>*"It could be an opportunity that once you have closed a client deal or once the client account has been established, managing it there provides opportunities for* | |

| | | | |
|---|---|---|---|
| | | *add-on sales. Communication directly with the account manager or sales." (workshop)* | |
| **<u>COMPANY:</u> COMPETITIVE EDGE AGAINST SMALL COMPANIES** | | *"And this is for sure if you think about the competitive advantage in the future and in public procurement [...] bringing this there." (B)*<br><br>*"[...] that those who visit the site perhaps search and see that there is an extranet and a log in there, and that, too, can arouse their interest in case they are thinking about buying, maybe it will come to their mind to ask if we this thing." (G)* | |
| **<u>COMPANY:</u> INCREASING SATISFACTION & RETENTION RATE** | | *"This way we can strengthen, increase customer loyalty. We will be able to market more and keep our finger on the pulse. Kind of a loyalty scheme."(workshop)*<br><br>*"Improving customer satisfaction, that's what we're after here." (A)* | *"[...] with this, we will be able to offer something more to the client." (workshop)* |

Appendix 19: Workshop 2 agenda and program



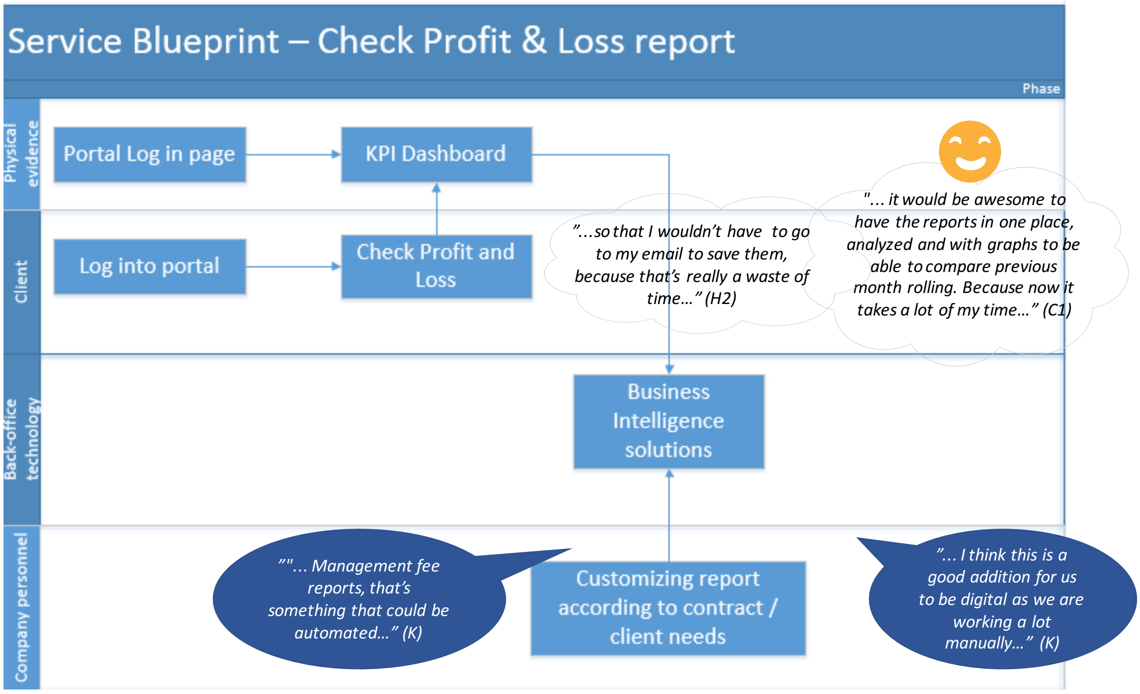
Appendix 20: Jobs-to-be-done canvas

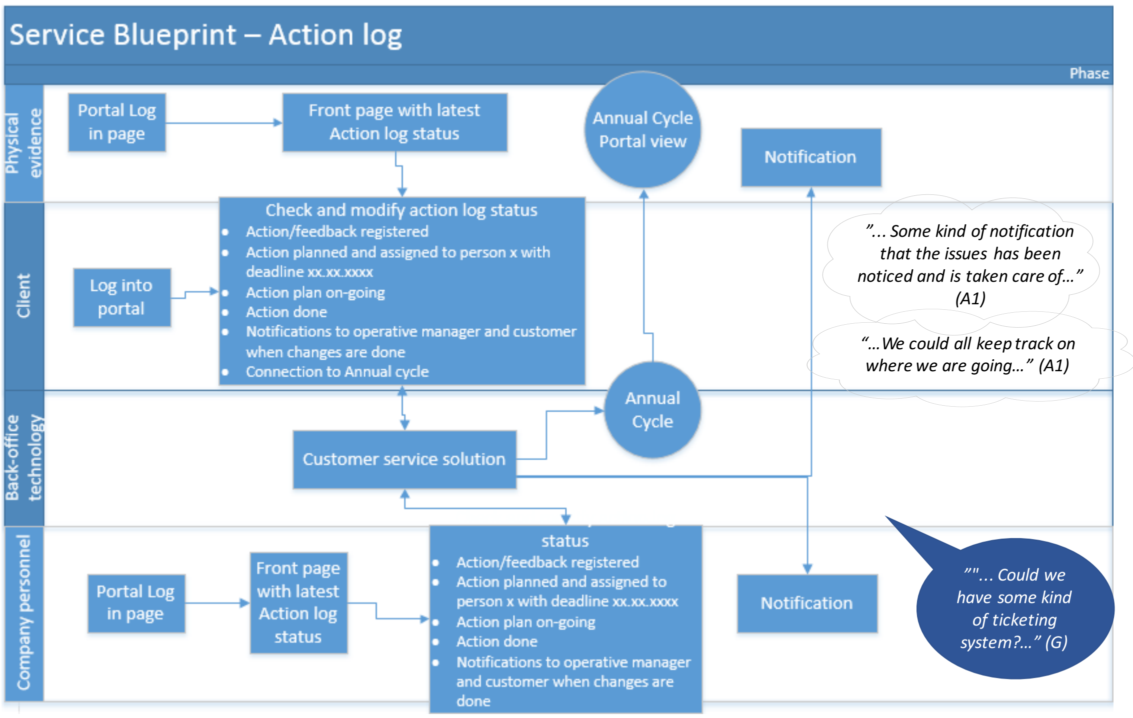
| MVP nr | By using this feature... | I want to[...] (perform a task) | So that I can (achieve a goal |
|---|---|---|---|
| 1 | "Annual cycle" / Calendar | •know what happens and when | •know agreed things will be implemented and I can communicate them further |
| 2 | Customer specific information | •find account's specific data in one place | •be sure everyone has the same data available |
| 3, 4, 10 | Archive for contracts, service level agreements, reports and invoices | •follow reports real-time<br>•follow-up on development issues<br>•follow up service implementation<br>•follow up deviations<br>•make sure that new personnel find materials | •see what needs to be reacted to<br>•make sure I do not need to react<br>•minimize manual work |
| 5 | Contact information | •see up-to-date information in one place, including responsibliity roles | •find contacts easily and reliably |
| 6, 7 | Follow-up and action log | •know what has been agreed | •see through that agreed things happen |
| 8 | Maintenance | •know what should be fized | •predict maintenance costs |
| 9 | Customer-specific news | •see relevant information related to my business<br>•have needed, timely information | •access general information about related to my account |
| 11 | Catering order (not guest order) | •see which departments order and what | •follow-up trend |
| 12 | Development roadmap | •have everything in one common place - I know where to look for information | •find it later<br>•analyse information<br>•Assign responsible people |
| 13 | Idea platform | •e able to ideate and participate in development<br>•see all ideas in one place<br>•feel motivated | •get better service |
| 14 | Invoicing | •be able to check the invoices | |
| 15 | Feedback channel | •follow feedback in one place (B2B & B2C) | •see the trend<br>•check that agreed actions have been done |

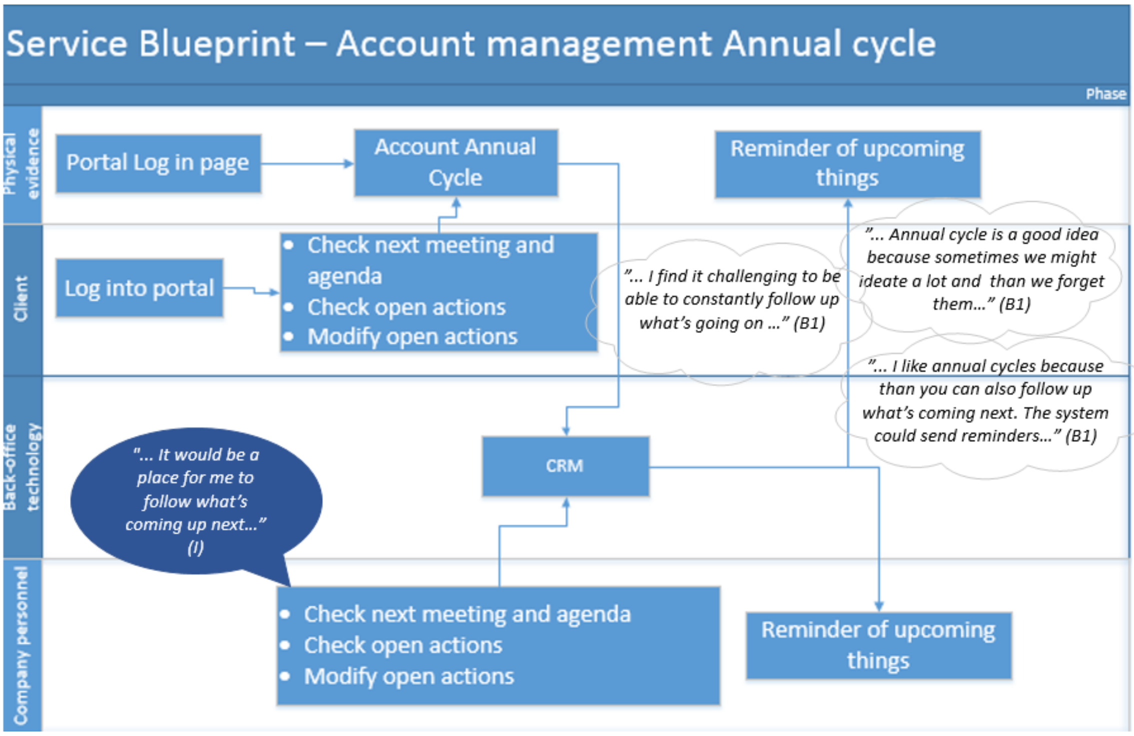
Appendix 21: Workshop 3 agenda and introduction

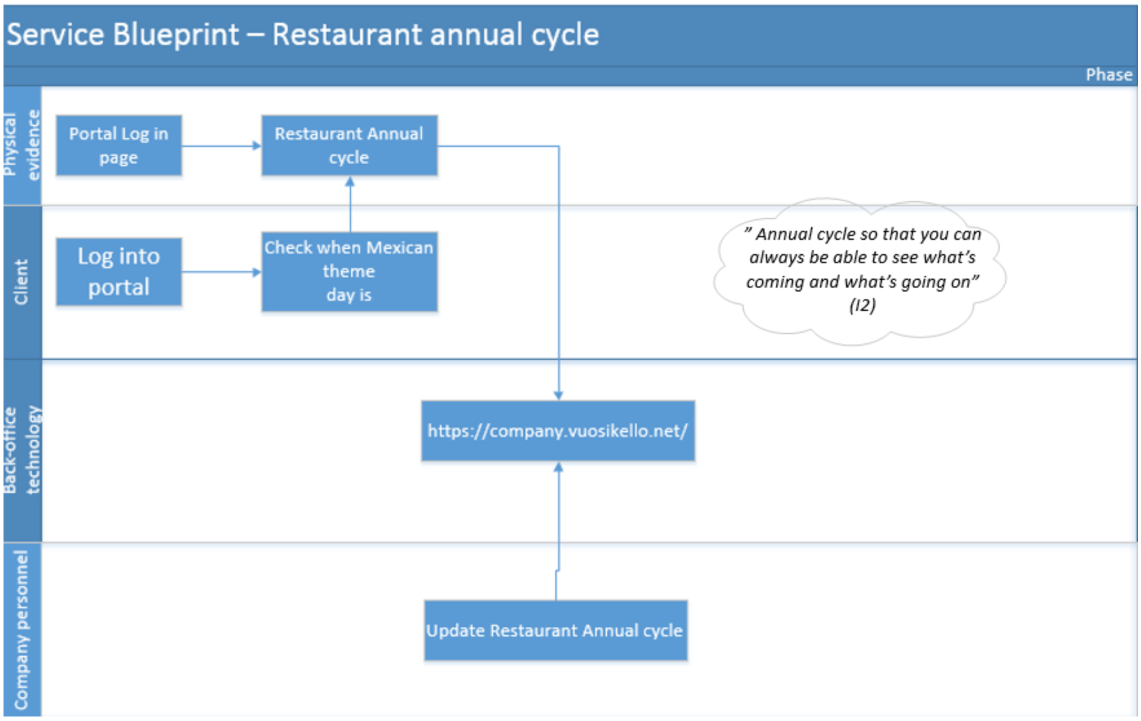


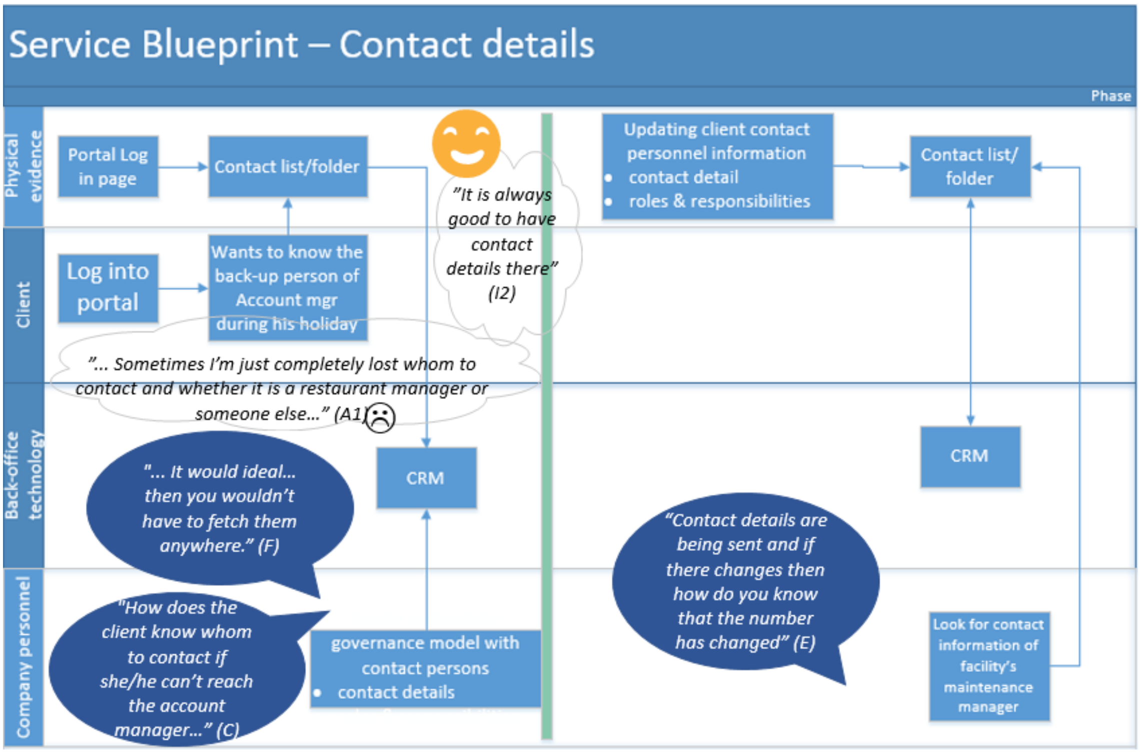
Appendix 22: Expressive service blueprints

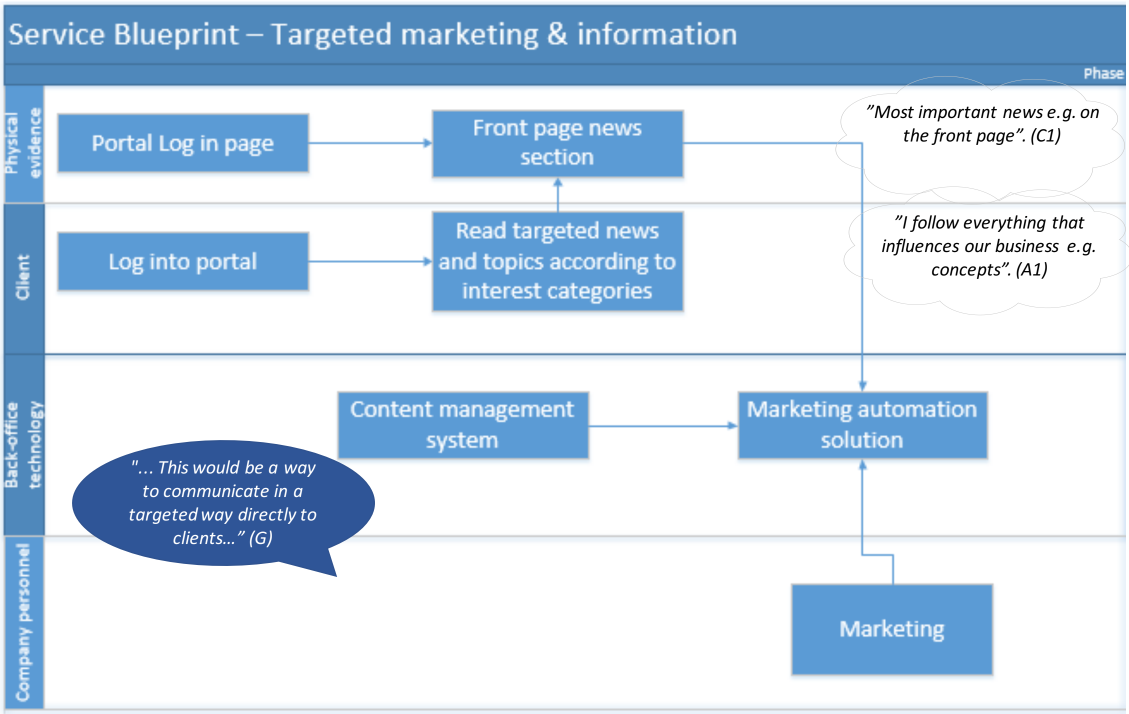


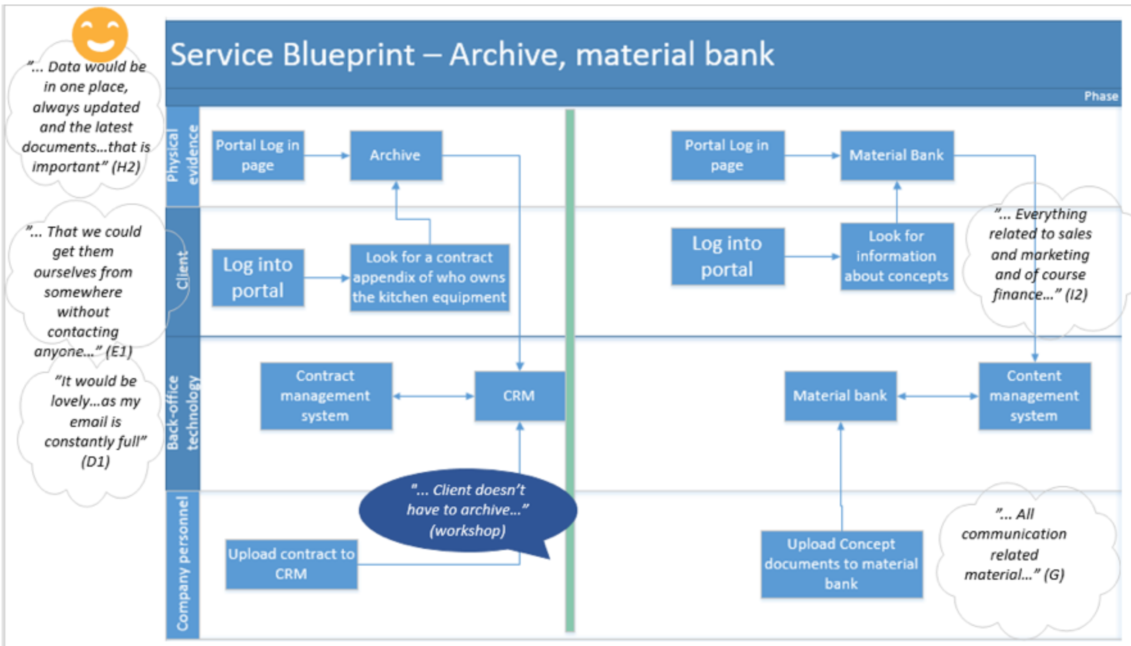



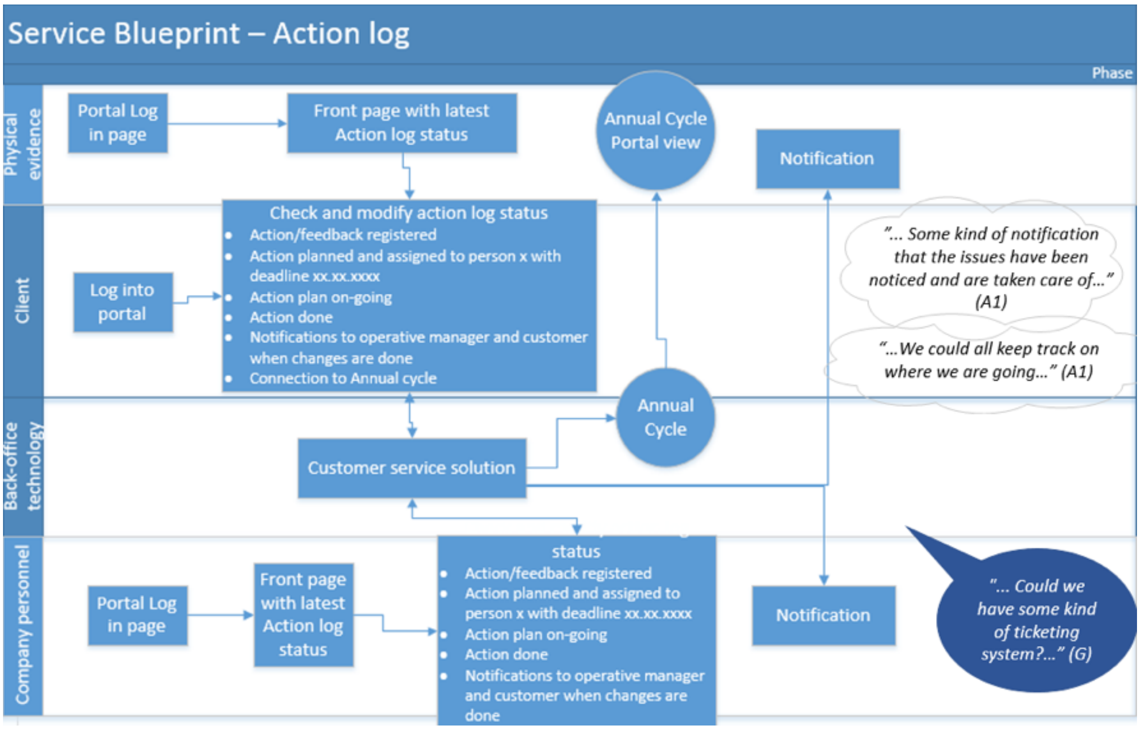

Service Blueprint – Account management Annual cycle
Phase
Physical evidence
Client
Back-office technology
Company personnel
Portal Log in page
Account Annual Cycle
Reminder of upcoming things
Log into portal
Check next meeting and agenda
Check open actions
Modify open actions
"... I find it challenging to be able to constantly follow up what's going on ..." (B1)
"... Annual cycle is a good idea because sometimes we might ideate a lot and than we forget them..." (B1)
"... I like annual cycles because than you can also follow up what's coming next. The system could send reminders..." (B1)
"... It would be a place for me to follow what's coming up next..." (I)
CRM
Check next meeting and agenda
Check open actions
Modify open actions
Reminder of upcoming things


Service Blueprint – Restaurant annual cycle
Phase
Physical evidence
Client
Back-office technology
Company personnel
Portal Log in page
Restaurant Annual cycle
Log into portal
Check when Mexican theme day is
" Annual cycle so that you can always be able to see what's coming and what's going on" (I2)
https://company.vuosikello.net/
Update Restaurant Annual cycle


Service Blueprint – Contact details
Phase
Physical evidence
Client
Back-office technology
Company personnel
Portal Log in page
Contact list/folder
"It is always good to have contact details there" (I2)
Updating client contact personnel information
• contact detail
• roles & responsibilities
Contact list/ folder
Log into portal
Wants to know the back-up person of Account mgr during his holiday
"... Sometimes I'm just completely lost whom to contact and whether it is a restaurant manager or someone else..." (A1)
"... It would ideal... then you wouldn't have to fetch them anywhere." (F)
CRM
CRM
"Contact details are being sent and if there changes then how do you know that the number has changed" (E)
"How does the client know whom to contact if she/he can't reach the account manager..." (C)
governance model with contact persons
• contact details
Look for contact information of facility's maintenance manager


Service Blueprint – Targeted marketing & information
Phase
Physical evidence
Client
Back-office technology
Company personnel
Portal Log in page
Front page news section
"Most important news e.g. on the front page". (C1)
Log into portal
Read targeted news and topics according to interest categories
"I follow everything that influences our business e.g. concepts". (A1)
Content management system
Marketing automation solution
"... This would be a way to communicate in a targeted way directly to clients..." (G)
Marketing


Service Blueprint – Archive, material bank
Phase
Physical evidence
Client
Back-office technology
Company personnel
"… Data would be in one place, always updated and the latest documents…that is important" (H2)
"… That we could get them ourselves from somewhere without contacting anyone…" (E1)
"It would be lovely…as my email is constantly full" (D1)
Portal Log in page
Archive
Log into portal
Look for a contract appendix of who owns the kitchen equipment
Contract management system
CRM
"… Client doesn't have to archive…" (workshop)
Upload contract to CRM
Portal Log in page
Material Bank
Log into portal
Look for information about concepts
"… Everything related to sales and marketing and of course finance…" (I2)
Material bank
Content management system
Upload Concept documents to material bank
"… All communication related material…" (G)


Service Blueprint – Action log
Phase
Physical evidence
Client
Back-office technology
Company personnel
Portal Log in page
Front page with latest Action log status
Annual Cycle Portal view
Notification
Log into portal
Check and modify action log status
Action/feedback registered
Action planned and assigned to person x with deadline xx.xx.xxxx
Action plan on-going
Action done
Notifications to operative manager and customer when changes are done
Connection to Annual cycle
"… Some kind of notification that the issues have been noticed and are taken care of…" (A1)
"…We could all keep track on where we are going…" (A1)
Annual Cycle
Customer service solution
Portal Log in page
Front page with latest Action log status
status
Action/feedback registered
Action planned and assigned to person x with deadline xx.xx.xxxx
Action plan on-going
Action done
Notifications to operative manager and customer when changes are done
Notification
"… Could we have some kind of ticketing system?…" (G)