



Practical Service Blueprinting

Your guide to generating actionable insights for service experiences

By Erik Flowers & Megan Erin Miller

www.practicalservicedesign.com

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Practical Service Design

By Erik Flowers & Megan Erin Miller

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Introduction

Our world is now made of services. We need new tools to think across this space, to not only create memorable and valuable experiences for our customers, but also empower our organizations to change the way we do business for the better. We believe that a practical approach to service design can empower staff and leaders alike to create immediate, positive, and lasting change.

A core component of this work is service blueprinting. This guide introduces our practical approach to this powerful method. We hope that this is helpful for you as you grow service design capacity in yourself and your organization, and welcome you to continue the conversation with us at our website:

www.practicalservicedesign.com

Go forth and blueprint!

Erik + Megan



Why Blueprinting?

Service blueprinting helps you see the experience a customer has with your service from a holistic viewpoint. It gives you not just the end-to-end view of the experience, but also exposes the “behind-the-scenes” work that goes into creating and delivering that experience. This surface-to-core information—the underlying actors, systems, touchpoints, policies—is critical to understanding and improving our services.

As you build your blueprint, you are able to uncover insights that relate to both the end-to-end and surface-to-core. This perspective enables you to effectively change the way your organization delivers your service for the better. Because of this, blueprinting supports improvement of internal processes just as much as it supports improvement of customer experiences.

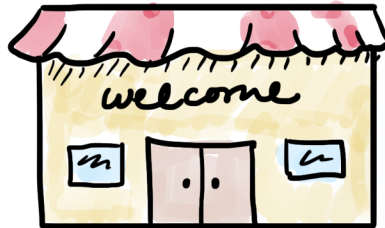
We believe blueprinting is one of the best ways to inspire your organization to act in a new way, to approach problems differently, and deliver experiences better than ever before. It is through shared understanding and a holistic perspective that teams gain meaningful insights used to transform service experiences. A blueprint is not just an artifact; it is a means to drive change.



When Blueprinting Works

Services are complex. When you are designing service experiences, you are often faced with a messy, ambiguous landscape, where customer pain is often rooted in other unidentified problems, creating unintended consequences and unpredictable experiences. This landscape of complexity is where blueprinting thrives.

Blueprinting works when you are dealing with “wicked” problems that are particularly hard to diagnose, and need a holistic approach to effectively uncover the root cause of the problem. It is the perfect method for approaching experiences that are cross-channel, involve multiple touchpoints, and are the result of a cross-functional effort — comprised of many different teams and stakeholders behind the scenes. Because of this, blueprinting works great for ecosystem-level scenarios that span and intersect across a web of offerings related to the service.

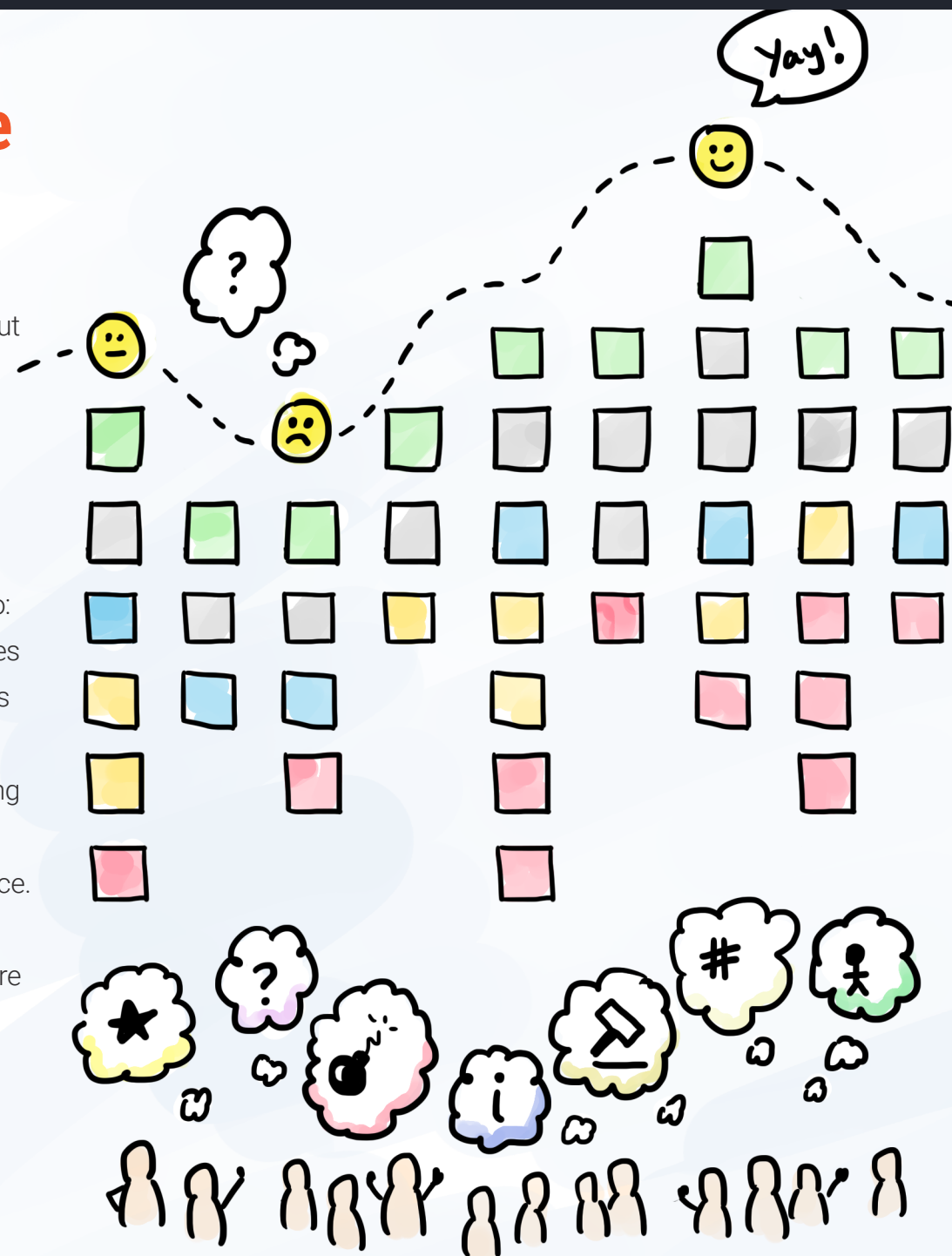


End-to-End, Surface-to-Core

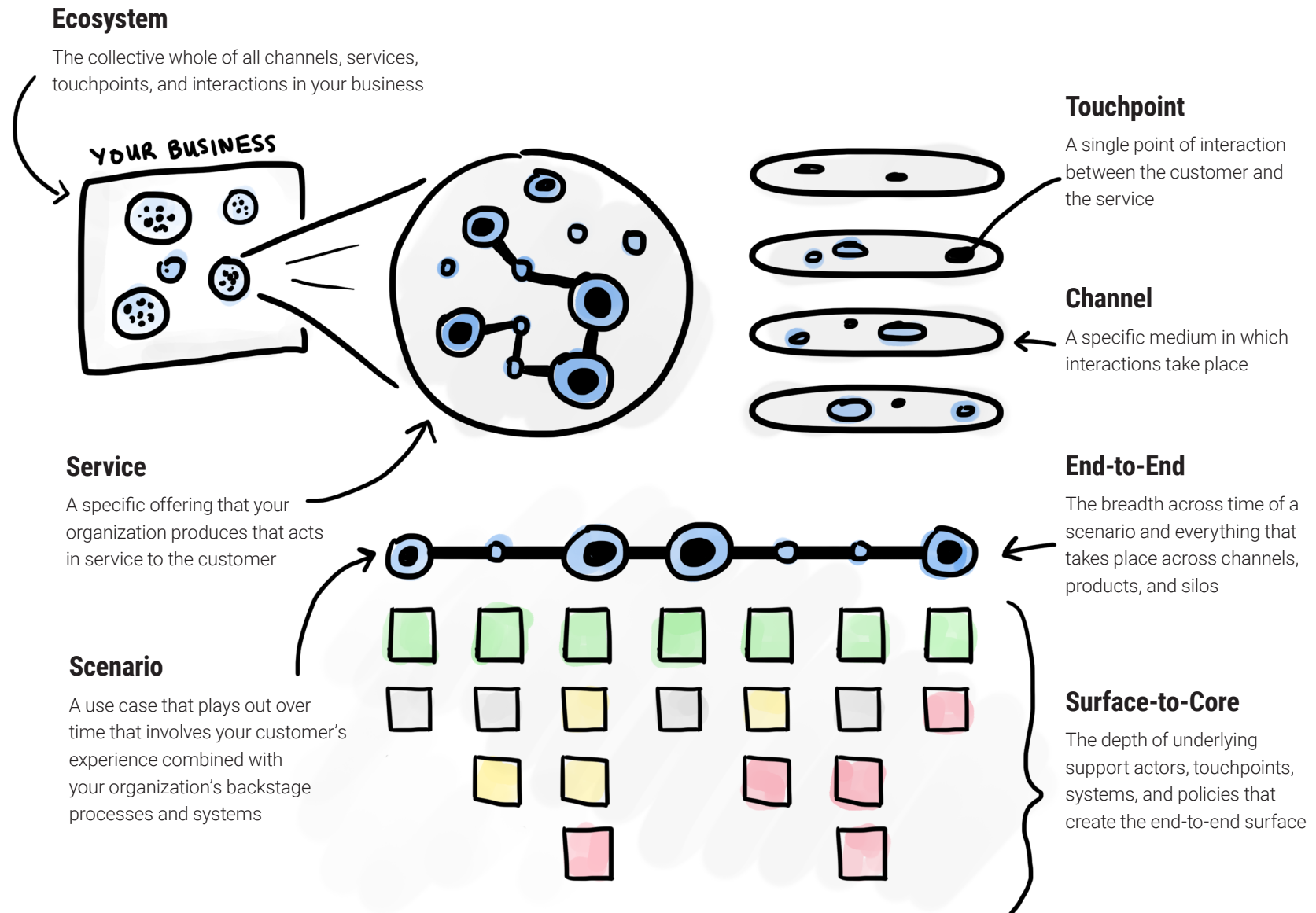
When we say end-to-end, we are referring to the start-to-finish experience of a service over time for a particular scenario. End-to-end not only encapsulates the experience of the customer, but also the activities of the behind-the-scenes staff and systems that deliver the service. This view takes into account things that happen before and after the primary experience, looking at upstream causes and downstream effects.

Surface-to-core is the bedrock that supports the entire scenario: the underlying support actors, touchpoints, systems, and policies that make up the layers beneath the end to end surface. It is this surface-to-core view that makes the practical blueprint distinct and different than a customer journey, documenting and auditing how the backstage fundamentally works, enabling teams to identify critical moments that make or break a service experience.

By helping organizations build an end-to-end and surface-to-core understanding (often for the first time!), blueprinting can enable holistic, meaningful change.



Anatomy of a Service Experience



Six Steps to Practical Service Blueprinting

Blueprinting works when it is approached practically, in the context of your organization. Here are six steps to service blueprinting that will guide you through the process.

1. Explore the opportunity space

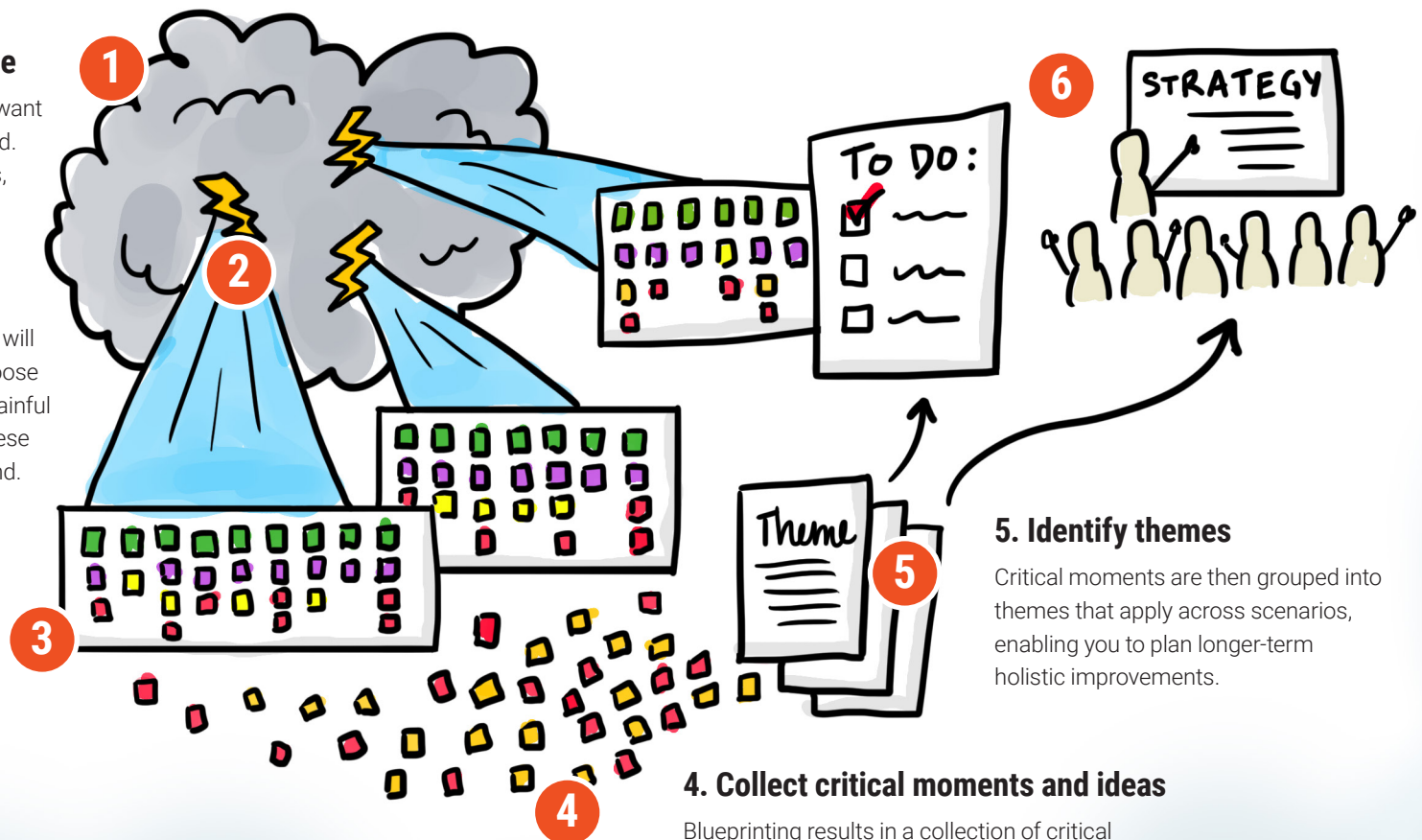
You start with an opportunity space you want to work in. This can be a problem or a void. This opportunity space crosses channels, contexts, internal teams and silos.

2. Choose your scenarios

Inside of these opportunity spaces, there will be countless possible scenarios. You choose a collection of important or particularly painful scenario experiences to blueprint, and these act as a use cases you want to understand.

3. Blueprint your scenarios

The blueprint gives you the high level end-to-end view as well as the detailed surface-to-core view of each scenario.



6. Take action!

What emerges are strategic areas of focus that can drive service roadmap planning, and tactical fixes that you can do immediately.

5. Identify themes

Critical moments are then grouped into themes that apply across scenarios, enabling you to plan longer-term holistic improvements.

4. Collect critical moments and ideas

Blueprinting results in a collection of critical moments and ideas, that capture insights into potential service improvements.

1 Explore the Opportunity Space

The goal of this step is to uncover and define potential scenarios to blueprint. These scenarios live within an opportunity space—a broad slice of your service, such as “new user signup,” or “booking and check-in.” These opportunity spaces are high-level concepts, not too specific, and easy for everyone to understand.

Choose an opportunity space that is key to your service’s success

They may map to phases of your customer’s experience with your service.

Within an opportunity space such as “new user signup,” you’ll find countless scenarios start to emerge. You’ll want to focus on scenarios of interest—ones that are particularly painful to your customer or your organization, or ones that are poorly understood and in need of definition. You may find many scenarios overlap with others, and that what seems like a simple use case on the surface might have multiple possible scenarios that can occur.

In order to identify high-impact scenarios, look at the data you have available both from inside and outside the company, and balance that with business priorities and strategic directions. This data might include your voice of the customer, user and market research, customer support data, and the vast knowledge of your subject matter experts. As you better understand the opportunity space, you can begin to list out the top scenarios to consider for blueprinting.

Identify all high-impact scenarios in the space

Opportunity Spaces are...

Broad concepts with a central subject matter

Simple and easy to understand

Based on internal and external data

Organic—they likely will have grown without intentional design



2 Choose Your Scenarios

The goal of this step is to choose your top scenarios, and break them down into steps. Out of the list of scenarios you identified within your opportunity space, you want to choose the most prevalent, painful, or ill-defined scenarios

Choose high-impact scenarios to focus on

to blueprint. These are the scenarios that, if improved, will have a high impact on improving your service experience.

It is important to involve a core team of stakeholders in defining scenarios. This team should be made up of experience owners and subject matter experts help that can help prioritize top scenarios that may have the biggest impact. Working with your stakeholder team, articulate each scenario in a defined use case statement—one or two sentences max, that captures the essence of the scenario.

Break your scenario into component steps

Once you've articulated each scenario, and the use cases that you want to focus on for that scenario, you need to break it down into its component steps. This is the end-to-end

of the scenario. It's not just customer actions, it includes steps that happen in between and behind-the-scenes as well. The stakeholders closest to the service experience and delivery process will be able to best help you define the steps of your scenario.

Define scenarios using scenario statements



Scenario Statement Template

"A customer wants/tries to _____, and experiences _____, resulting in _____."

Example: "Online orders are slowing delivery"

A cafe has implemented a new online ordering system and the kitchen is being overwhelmed with requests, causing all orders to come out too slow.

Use case #1: Customer orders ahead for a group

Use case #2: Customer orders ahead for self

Use case #3: Customer shows up late to pick-up

3 Blueprint your scenarios

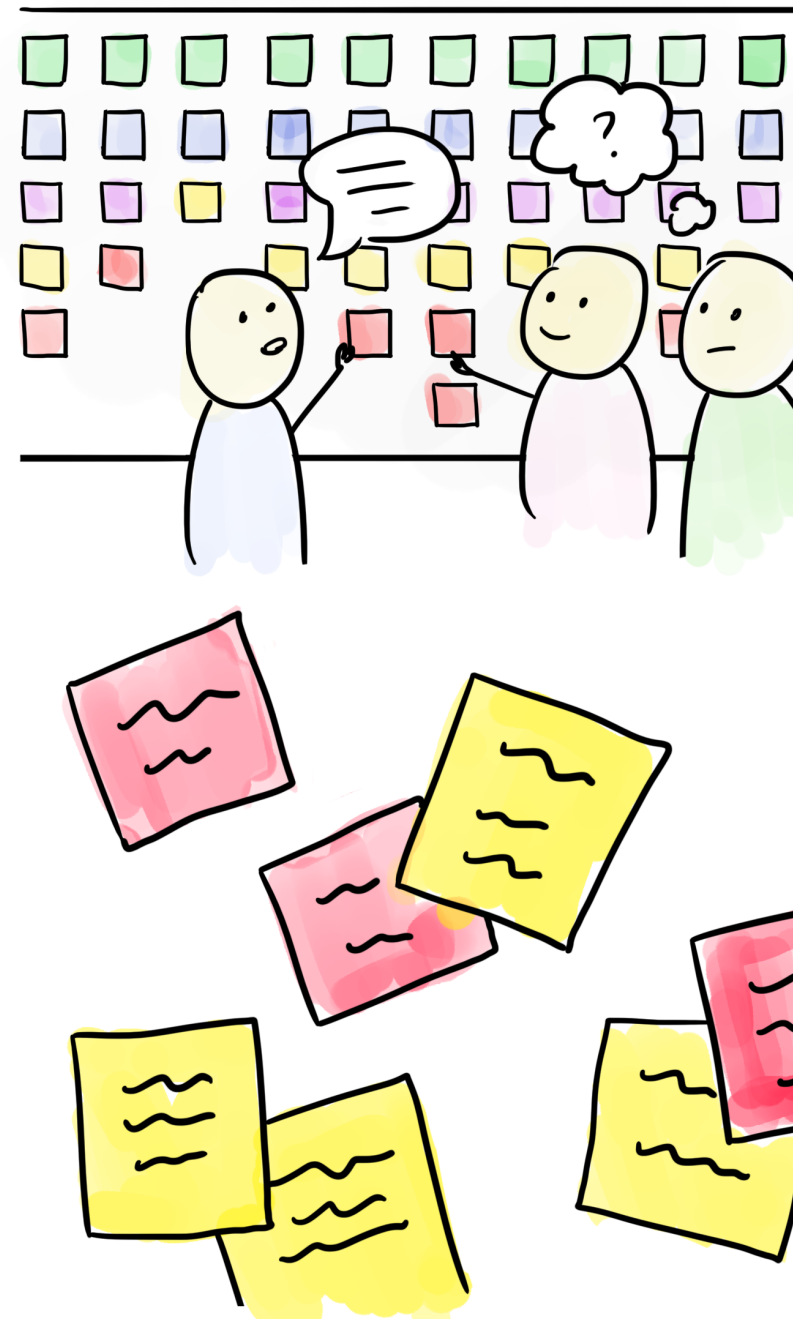
Finally, you're ready to start blueprinting! Remember, the goal of blueprinting is to add surface-to-core depth to your end-to-end scenario. This view gives you the simultaneously high-level and detailed view of what you are trying to define and diagnose, and helps you identify critical moments and ideas for service improvement.

Prepare your steps and touchpoints beforehand

By now, you should have your scenario defined, and all the specific use cases within that scenario identified. You should have worked with your stakeholder team to break up the use cases into specific steps before you start blueprinting. This might look like a task flow outline of all the steps that take place, both by the customer and the "behind-the-scenes" process. Touchpoints may also be identified ahead of time and placed along with step definitions to make the blueprinting process go faster. These might include: photos, screenshots, sketches, or anything that can illustrate what the touchpoint is for each step.

Once you've got your scenarios broken down, you'll need to get all the subject matter experts together for a big blueprinting session. In the session, go over the scenario you plan to blueprint and read through the steps to make sure you're all in agreement that it accurately reflects the scenario.

Schedule a blueprinting workshop with subject matter experts



The actual building of the blueprint is not a complicated process. It involves the team of stakeholders and subject matter experts setting aside time to all get together, and co-create the document, each bringing their unique knowledge of the scenario.

Add detailed layers to your blueprint

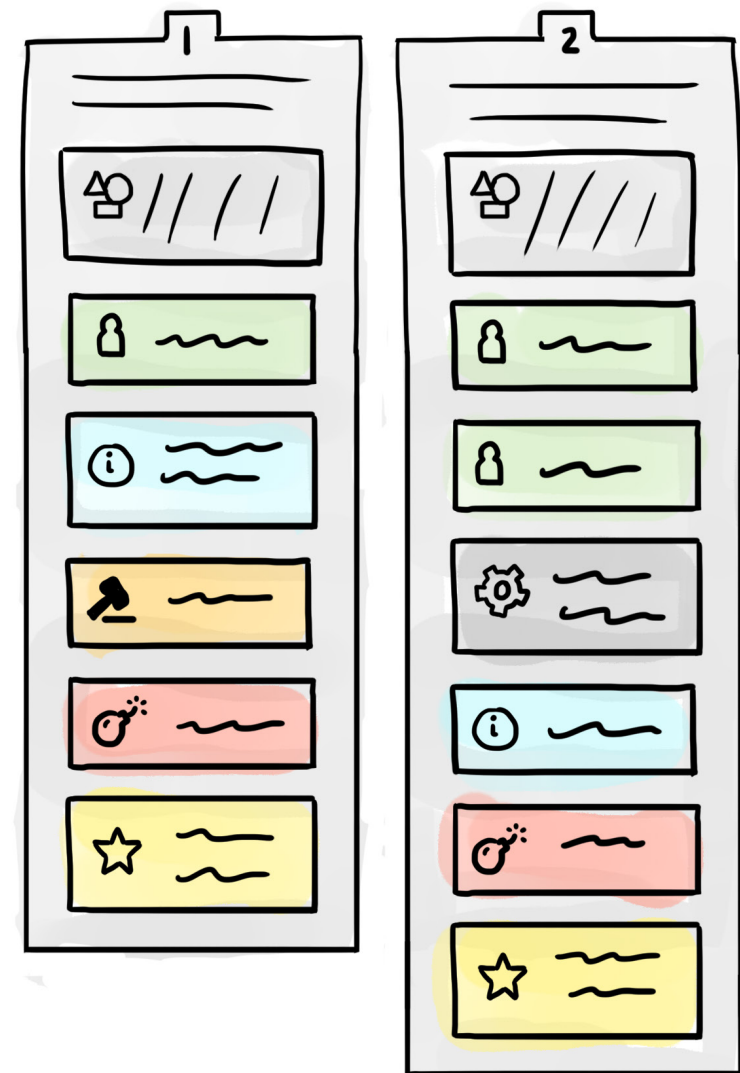
Build the blueprint from left to right. Starting with the first step in the scenario, use the blueprint layers (see next page) as a checklist

to add the surface-to-core detail to that step, asking, “Does this step have aspects that apply to this layer?” You may have more than one of each layer (or none!). Get as thorough and detailed as you can.

As you go, you may notice members of your team coming up with ideas to solve specific problems. While we don’t want to encourage solutionizing, we do want to capture these ideas and keep them in context for the future. Critical moments and ideas are the most important layers in the blueprint, as they will lead to actionable insights, so make sure you pay special attention to these layers. When a step feels like it has been sufficiently detailed, move to the next step. Repeat this process through the entire scenario.

Capture all critical moments and ideas

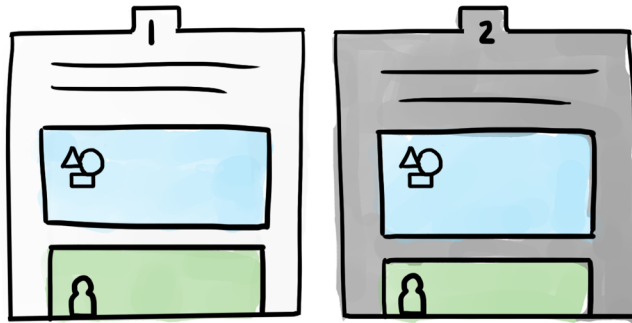
As people talk, add layers to each step live during the session. We recommend projecting your laptop and using a template (which you can download from our website at www.practicalservicedesign.com), but you can also use post-its if you want to. Be sure to record all questions in addition to information that comes up for each step.



Blueprint Anatomy

Step Visibility

A light background indicates the step is visible to the customer. A dark background indicates a step is hidden, or "behind-the-scenes." If you are using post-its to run your session (and not a digital template), you can easily use a post-it at the top of the column to indicate visibility.



Paint the Picture











The purpose of the top set of layers is to get an accurate, detailed, thorough understanding of the step. These layers paint the picture of the action taking place in the step, and provide important context for the team to generate insights.

Capture Insights

The bottom set of layers—questions, critical moments, and ideas—are really the goal of the blueprint. These are the insights generated from the blueprinting session that will lead to actionable service improvements.

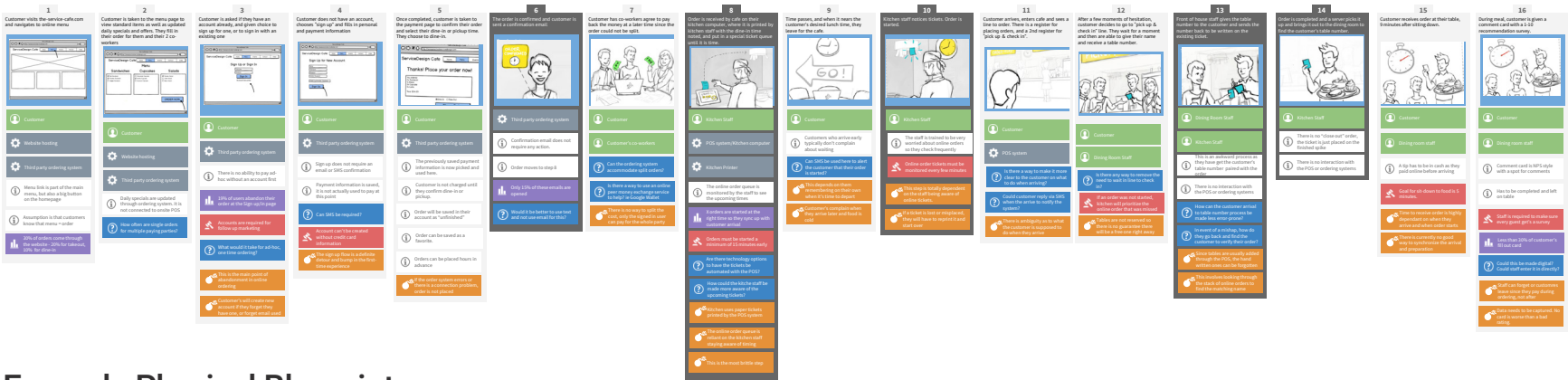
Blueprint Layers

Each step in the blueprint is a column, with the step definition at the top of the column that tells the story, and all of its supporting layers beneath. You can add your own kind of layers to your blueprint if you need a specific type of information to capture!

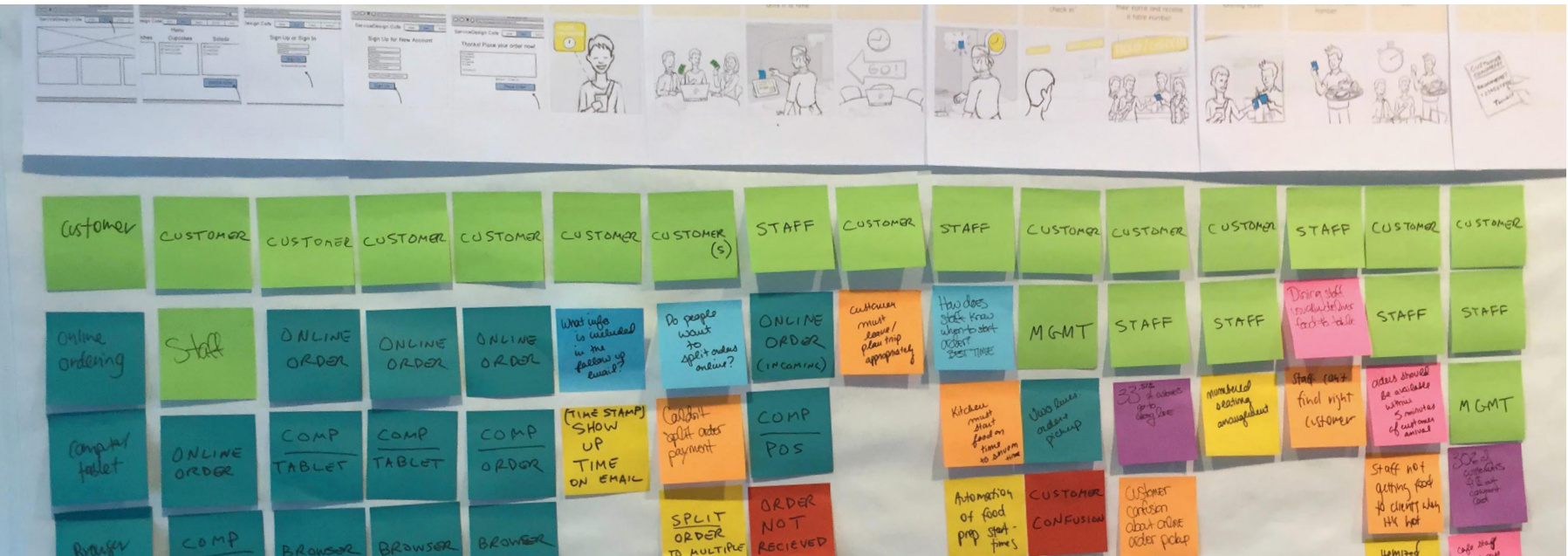
-  **Step Definition:** A plain-words descriptor of what happens in the step.
-  **Touchpoint:** The what/where of the step's interaction, including an image if appropriate/possible.
-  **Actor:** The customer and/or support actors of the step. (Note: customer present indicates step visibility)
-  **System:** What makes this step "go". Technology, hardware, processes.
-  **Observation / Fact:** Statements that are important to note and add detail to the overall step.
-  **Metric / Data:** Data that helps illuminate the step's context or importance.
-  **Policy/Rule:** Rules or policies that dictate why something is a certain way.
-  **Follow Up Question:** Our questions about a step that need to be noted and followed up on.
-  **Critical Moment:** Critical moments that are the sources of pain and experience breakdown.
-  **Idea:** Ah-ha realizations on things to improve or fix for broader impact.

Example Blueprints

Example Digital Blueprint



Example Physical Blueprint



Download templates from our website at www.practicalservicedesign.com

4 Collect Critical Moments and Ideas

The goal of this step is to take the crucial pieces of information you gained through blueprinting and put them all in one place for analysis. This is especially important if you are trying to integrate insights from multiple blueprinting sessions (over more than one scenario). By collecting all the critical moments and ideas from all your related blueprints, you can generate more holistic insights for service improvement within your opportunity space.

Imagine you have done four blueprinting sessions on different scenarios related to “online ordering.” You have generated dozens of critical moments and ideas. By dumping them all together, you can start to see larger themes emerge, and begin the process of prioritizing and weighting each insight. We suggest typing up your critical moments and ideas into a spreadsheet, that way you can track

Get critical moments and ideas collected into a single spreadsheet

the source of each, and add additional metadata such as weight, priority, theme, or stakeholder information.

The true value of blueprinting is the actionable insights generated through capturing critical moments and ideas from your stakeholder team. Through critical moments, you gain insight into the overall pain present in the scenario, and through ideas, you gain insight into the opportunity to improve the service.



Example Critical Moment

Critical moments often capture a “possible point of failure” in the service scenario. The example above is a critical moment because if a customer asks for a featured flavor and it’s not available, that could result in the customer leaving unhappy without buying anything.

5 Theme Identification

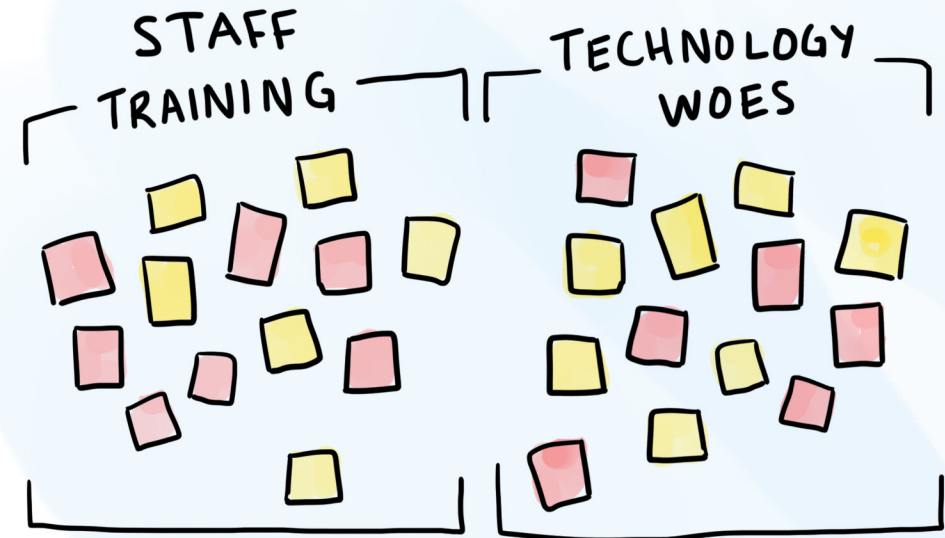
The goal of this step is to find how the critical moments and ideas tie together and enable holistic service improvements. As you review the collection of critical moments and ideas, you and your group of stakeholders will start to recognize patterns (or the lack thereof). Come up with a naming system to label these overarching themes in your findings.

Group critical moments and ideas into themes

Sometimes things will group together in obvious ways, or sometimes critical moments or ideas

might be off by themselves and not fit in anywhere. The key to identifying themes is the same as the rest of the process: having stakeholders present that represent the entirety of the experience.

The themes you identify are most powerful when they are tied back to principles for the types of experiences you want to create, and have alignment with the overall vision for the opportunity space. Experiences never exist in a vacuum, and in the long term it will be the evolution of the thematic elements that creates lasting change in what you offer and how your organization approaches created those experiences.



Think Outside the Box

During this process, try to help your team see the hidden relationships between things, and iterate on your “buckets” until you feel like they fit. There may be more than one way to group things.

6 Strategic and Tactical Insights

The goal of this step is to take your insights and define the strategic and tactical actions to take. The overarching themes you identified are now the basis for creating strategic directions for your organization. Within each theme, you will find there are more broad implications as well as more tactical fixes, things that

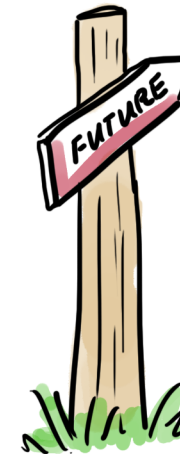
Communicate strategic themes to your leaders

you can “just go do.” The broad strategic direction will require you to frame the problem alongside the insights you have gathered.

In each theme, you can identify the tactical fixes as things that relevant service teams can address immediately in their backlog. Having your stakeholders and subject matter experts working from a shared source of knowledge streamlines the process, since everyone involved can see the impact of the fix and prioritize the work based on available resources, as they are owners of that process.

We suggest that you articulate the essence of each theme in a single page document that names the theme, describes the problem statement, and summarizes the strategic areas and tactical fixes (download our template at www.practicalservicedesign.com). Changing your opportunity space will take time and patience, so having these themes well documented can give you a “true north” to point towards. Base your strategic themes on principles and a vision for the opportunity space for them to be most useful and relevant.

Communicate tactical fixes to the relevant team for them to implement



Strategic Themes

Overarching across the opportunity space

Long term changes/innovations

Requires a shared vision

Tied back to principles

Broad thinking



Tactical Fixes

Specific, concrete action items

Immediate “just go do,” common-sense changes

Requires owners and drivers

Tied to immediate needs/triage

Focused thinking



Everything all together!

You have everything you need to go through a practical blueprinting project lifecycle, from original insight in your opportunity space, all the way through finding strategic themes and implementing tactical fixes. The practical service blueprint lets you rally your peers around a project, diagnose tough problems, understand and see the truly holistic view, and take meaningful action.

The Future

Blueprinting can give you actionable insights that affect the strategic direction of your organization, as well as the day-to-day small stuff. But it takes your passion for the service design mindset to cultivate lasting change in the way your organization approaches designing service experiences.

We hope you're able to take what you've learned from this guide and apply it to your own organization. Please get in touch, and let us know how it went! We are so excited to hear from you, and learn about how you are using this practical approach to service design!

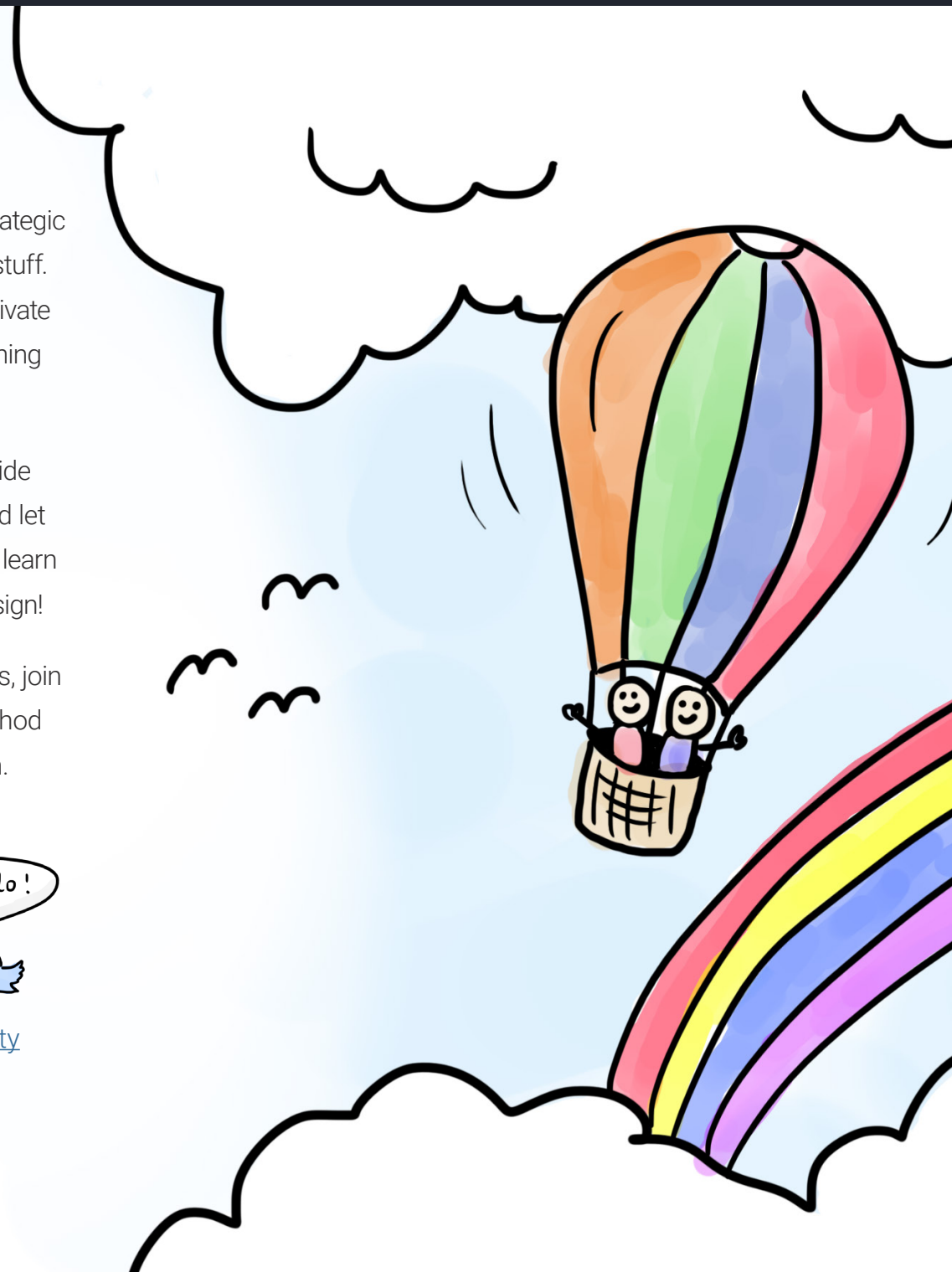
Visit www.practicalservicedesign.com to download templates, join us in conversation, and stay connected as we evolve the method and continue to develop the future of practical service design.



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All in this complete Practical Service Blueprinting online course — go at your own pace and learn with rich video and learning content!

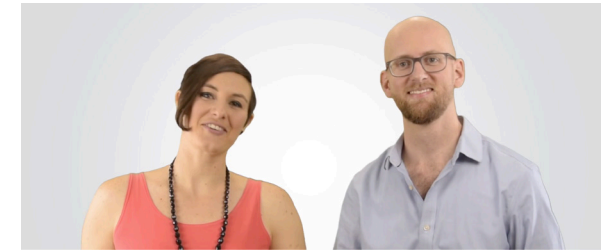
You will learn what it takes to organize and run a service blueprinting workshop, synthesize the output and generate actionable work for your organization, and grow your service design skills as a trained service blueprinting facilitator!

In this class, you will:

- Learn what a service blueprint is, what it's good for!
- Plan out your service blueprinting project
- Learn how to facilitate a blueprinting session
- Learn each step of the blueprinting process
- Understand what to do with the output of your blueprint

Use this class to learn how to do service blueprinting. This class will help jumpstart you towards completing your first real blueprinting project!

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MEGAN MILLER
@meganerinmiller

ERIK FLOWERS
@erik-flowers

