

**Practical Approaches to Service Design Emergence:
Participatory Design Methods and Client Engagement in Service
Design Consulting**

by

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ABSTRACT

Service designers seek to coordinate and express organizational capabilities as systems that naturally support customer experience. Service design reflects the increasing realization of the strategic value of designers within a range of business sectors, necessarily involving consideration of, and collaboration with, varied stakeholders. Partnership between service design consultancies and their client organizations is a form of interdisciplinary design collaboration, which can be addressed through specific design methods. This study explores the intentions, implications, and opportunities perceived by design consultants regarding the alignment of these methods and objectives. This is achieved through in-depth interviews with consultants from service-oriented design agencies, including Adaptive Path, Bridgeable, Designit, Doberman, Transformator Design , and Veryday, as well as content analysis of these consultancies' websites and a consultant-oriented survey.

The study finds that client engagement is regarded by service design consultancies as the primary objective of participatory design methods. These methods are believed to enable the integrated pursuit of client research, education, and empowerment, as well as the consultancies' own viability. Strategic objectives are pursued holistically, arising from the service design consulting engagement, and the participatory design methods utilized in its course.

Keywords: Service design, participatory design, design consulting

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CHAPTER ONE

INTRODUCTION

Service Economy: The service sector is vastly and increasingly dominant in the economies of many developed countries (Saco & Goncalves, 2008; Salter & Tether, 2006 as cited in Kimbell, 2009). The categorization of industry into primary (resource extraction), secondary (manufacturing), and tertiary (services), can be traced back to ancient times, along with the notion of value co-creation between service providers and their clients (Katzan, 2011). The varied service touchpoints of organizations serve as channels through which they interact with others, including individuals and other organizations, thereby asserting and defining their place in the economy through the social construction of value.

Service Strategy: In a competitive landscape, corporations must coordinate their long-term aims and short-term operation. They must be engaged with their corporate strategy and continually reflect upon their ability to realize this strategy through their corporate structure, capabilities, and offerings. A system of designed artifacts, coordinated to constitute a service experience that is, in turn, the manifestation of a distinct value proposition, is a fundamental strategic framework (Fraser, 2012). Correspondingly, design processes are increasingly recognized as having value toward developing many levels of corporate strategy (Bürdek, 2005; Junginger, 2008; Lockwood, 2009; Sanchez, 2006; Seidel, 2000). Service strategy involves the coordination of disparate touchpoints, stakeholders, and resources, contributing to the necessary complexity of service projects. The great scale and interconnectedness of these projects is such that the organizational characteristics of service providers become entangled and expressed in

their service offerings or - to use terminology that illustrates this point - their service manifestations. Therefore, if services are addressed with sufficient rigor, they are inseparable from organizational strategy.

Service Experience: Services live and die by the engagement of their users - fulfilling experiences encourage users to engage deeply with services and to return, while frustrating and inconsistent experiences will drive them avoid a service and to seek a competing alternative. The varied points of interaction within a service contribute to the overall user experience, which is sometimes regarded as the customer journey. The characteristically user-centric approaches of designers enables them to address services from this perspective, and designers are expanding their influence within organizations through this proposition. As the propagation of services forces competition based on rich and rewarding user experience, service organizations are increasingly responsive to the purported relevance of a design-led approach. Through service-led strategy and user-centered services, the fundamental measure of organizational success is shifting from economic efficiency to experience effectivity and affectivity. Organizations that succeed in this realm aim to orient their operations toward providing users with seamless, cohesive experiences across their channels of interaction, encouraging sustainable construction of value with satisfied, loyal users.

Service Design: Service design seeks to coordinate organizational infrastructure and capabilities as systems that support customer experience. In doing so, service design reflects the implications that wider economic shifts - from manufacturing to information and service economies - have within design industries (Mager, 2008). Service design consultancies' ability to engage their clients is a form of interdisciplinary design collaboration that can be addressed

through specific design methods. These methods may include participatory design methods, which strategically engage non-design stakeholders in design activity, and have significantly developed in service design contexts. Participatory design will provide a useful framework for the evaluation and analysis of service design activity.

1.1. Statement of Problem

Service design consultancies have much to offer the multitude of organizations that are grappling with the complexities of the service-based economy. The competitive environment offers opportunities for these firms to assert their unfamiliar approach as a differentiating factor for their clients. In order to do so, service design consultancies must be intensely aware of the context in which they operate and the evolving perspectives of their prospective clients. Their modes of client engagement should be carefully coordinated with the objectives of developing such an awareness, as well as the development of a collective conception of the value of service design within the service industries. Service design consultancies should be able to reflect upon their place within the service economy, and be responsive to the ever-changing perspectives and needs of service organizations. This will allow them to communicate and realize the organizational relevance of their service design approach, thus enabling them to tap into the vast potential clientele represented by the service economy.

Hiding Behind a Curtain: Design methods play an important role in linking activity and knowledge. This quality must be exploited for the aims of coordinating practice and reflection in the engagement of clients. Designers may hide their methods from non-design partners, with the rationale that the apparent messiness may be off-putting and lead to confusion and distrust. However, for the professional designer, such creative activities are central to their process, and

integrated into unique design methods that support constructive and abductive reasoning (Kolko, 2011; Schrage, 2009). Design practice values appropriateness above the concepts of truth and justice that are primary in the sciences and humanities, respectively (Cross, 2007). This means that knowledge is quickly developed and communicated, experientially, through the iterative creation of prototypes and visual artifacts. Such evidence of progress increases confidence, perceived control, and promotes commitment to these encouraging methods (Gerber & Carroll, 2012). By involving their client in design methods, service design consultants could take advantage of this characteristic of design methods to engage their clients, integrate with and leverage client capabilities, and disseminate their value proposition.

The Uncertainty of Disciplinary Evolution: As design practice matures, the value of a design approach is developing from specific project / deliverable-based value and toward knowledge-based value. As a consequence, the value of a design approach can be seen by some to be more abstract, intangible, and therefore more difficult to grasp than ever before. However, this shift is also enabling designers to have a greater impact in some organizations, through projects that transcend the scope of traditional design deliverables. When recognized as a general approach and mindset rather than a product detached from its context, design is revealed to be relevant to many areas of organizational concern, including marketing / branding, customer experience, customer service, interaction, and so on. Correspondingly, designers must be able to communicate this shift and expansion in design practice as one of significant holistic cohesion rather than of one of etherial abstraction. The unification and definition of a specific discipline would provide a touchstone for practitioners and clients alike, from which recognizable methods and vocabulary could be developed, and a value framework established. A mutually recognized

discipline of practice communicates confidence, cohesion, and validity, and would provide a necessary foundation for the assertion of design within the service economy.

Trimming to Fit: The issues faced by modern service organizations are increasingly complex. Many of them are coming to the realization that a design approach is more appropriate than traditional linear modes of problem solving. As such, the strategic role and value of design has gained recognition in the business community (Lockwood, 2009), but the implementation of certain concepts for design within business, such as Design Thinking, has been fraught with confusion and missteps that threaten to negate the credibility of design in this realm (Carr, Halliday, King, Liedtka, & Lockwood, 2010). This is because Design Thinking appropriates the designerly mindset for managers and executives as an approach to problem solving (Brown, 2008), generating confusion regarding the distinction between design and Design Thinking and, therefore, counterproductive contention over the ownership of design (Carr, et al., 2010). In the long term, design practice seems to be marginalized and the potential benefits of design are not realized. An organization that hopes to reap the benefits of the systems-based insights of design intelligence must look beyond Design Thinking, and towards the embedding of collaborative design practice and design leadership within their organization (Meyer, 2011). Design consultancies must take control of their message as design terminology gains popularity within business and management literature.

1.2. Background and Need

Service design consultancies are constantly grappling with the mission of communicating their value to clients, by virtue of their existence within the real economy and their need to attract and maintain clientele to sustain their business. They are necessarily entangled with the

challenge of client engagement through this position. Their methods, websites, literature, and other client-visible self-representations contribute to a construction of the definition of service design practice. Therefore, previous research of service design, evolving design methods, and the organizational orientation and adoption of design approaches can provide valuable context for this study.

Compelling Involvement: In particular, participatory design methods involve non-designers and serve to coordinate research objectives with those of empowerment. Ho and Lee (2012) declare that the nature of design work - involving abductive logic, and complex problems - means that it is methodologically necessary to practice design participation. Participatory design incorporates an emancipatory ideology that strives towards the goal of “developing capacity and ability to empower the organisation to achieve local action” (Holmlid, 2009, p. 4). Thus, the relationship between the participating stakeholders, including the facilitating design experts, can be considered as an equally important aspect of the design project, or even as a project in itself. These integrative qualities may have led to the significant propagation of participatory design methods in service design, but the extent to which they are regarded and leveraged as strategic tools of client engagement is unclear.

The Crystallization of a Discipline: A recognition of the opportunity represented by the service economy, and the need to adapt for this context, is reflected in the organization of designers around a loose set of methods, clients, and projects, under the banner of Service Design. This emerging practice reflects the increasing realization of designers’ strategic value within a range of business sectors, and involves consideration of, and often collaboration with, varied stakeholders. Service design is a emergent field (Kimbell, 2009) - a new practice that is

not quite yet a discipline. It is distinct from design thinking, yet they have many similarities and overlap in a few key principles - namely, the experience of value from the user perspective (Wetter Edman, 2009). Service design practitioners must yet formalize and communicate their value relative to, and distinct from, other areas, which, ideally, includes a generally common set of practical methods.

Design Led Organizations: The sense-making processes of designers are particularly appropriate for addressing complex and uncertain problems – similar to those encountered in the business world (Sanchez, 2006). Designers must be able to realize and communicate their relevance to organizational issues. In *The Art of Innovation* (2001), Tom Kelley discusses “hot groups,” (p. 69) framing design capability as a quality of a team, rather than the skill set of an individual. Teams share the mission of the project and the common language of visual externalizations, such as prototypes and models, which drives their collaboration and motivation. Along this framework, certain corporations are integrating design capabilities and vision throughout their organization by framing them as core competences and leading principles (Hands, 2009; Joziasse, 2008). Design-led organizations formulate corporate strategy based on the insights that arise from the design methods embedded and appreciated throughout their structure (Seidel, 2000). Designers’ characteristically user-centered methods can be adapted towards framing customers, clients, or employees as users (Dunne, 2011), which leads to many strategic fronts on which design can contribute (Seidel, 2000). For organizations that are open to design leadership, the insights and projects that result from design activity can represent significant competitive advantage (Lockwood, 2009).

Service designers are in a new field with little precedent for the application and adaptation of a design approach. The precedent that does exist, including the paradigm of design thinking, must be leveraged without sacrificing the integrity of the differentiating qualities of service design that define the practice's unique appropriateness within the service economy. Service design consultancies are growing in number, visibility, and prestige. Their potential ability to align their design methods with objectives of client engagement is postulated from a theoretical standpoint. However, the existence of such a priority among practitioners, and the ways in which this mandate is (or is not) consciously addressed through design methods is rarely documented.

1.3. Scope of Topic

The objective of this research was to examine the use of participatory design methods in service design consulting by gathering practitioner perspectives from service design consultancies, and to make an analysis of the intentions, implications, and opportunities for the alignment of such methods with organizational integration and engagement with clients.

The driving question of this research is: How are approaches to participatory design methods among service design consultancies contributing to the emergent definition of service design? This over-arching question can be broken down into the following sub-questions:

- To what extent do service design consultancies leverage participatory design methods for objectives of organizational integration and client engagement?
- To what extent is there a conflict between the authority of design expertise and the democratizing and empowering ideals of participatory design?

1.4. Rationale and Approach

This research will encourage heightened awareness of the opportunities for service design consultancies to coordinate design methods expertise with goals and tactics of client engagement. “The development of a formal language for services is one of the exciting new fields in development and practice” (Mager, 2008, p. 355); this research will contribute to such development. Service designers themselves are aware of the need formalize their vocabularies and methods in order to develop their community of practice into a stabilized discipline (Kimbell, 2009).

This study investigates the emergence of service design through the lens of the methods of service design consultants. Through such practice-oriented research, this study seeks to map the contemporary perspectives of service design consultants regarding their engagement of clients. The organizational engagement of design consultancies and their clients is a form of interdisciplinary design collaboration that is particularly relevant to the day-to-day practice of design consultancies. This engagement is a useful representation of their relationship with the service economy, on a scale that is relevant and actionable. Similarly, design methods embody the emerging practice of service design at a level that enables reflection of tangible, discrete experiences, thereby enabling opportunities for discursive research with practitioners. In this way, this research appeals to its intended audience, aiming for utility for service design consultants who seek to situate themselves within the service economy through mindful demonstration of their methods, practice, and value.

Previous research has addressed the link between design intelligence, practice, and the communication thereof (Cross, 2007; Gerber & Carroll, 2012), and has called for the embedding

of design practice (Kimbell, 2011; 2012) as a more effective path to organizational design integration than the relatively passive methods put forward by design thinking (Carr, et al. 2010; Meyer, 2011). The proposed research will address how participatory design methods embody this intersection of design intelligence, experience, and communication in the specific in-practice contexts of service design consultancies.

In order to develop a comprehension of service design consultants' perspectives regarding participatory design methods, the researcher conducted six in-depth interviews with representatives of six different internationally dispersed service design consultancies. The researcher also conducted a survey that received participation from 23 service design consultants at no less than 13 consultancies. Further representation of the service design consultancies' perspectives were gleaned from content analysis concerning the websites of the consultancies that were involved in the interviews. These three methods were coordinated to achieve a rich understanding of service design consultants' perspectives on participatory methods, both tacit and directly presented. The research strived to investigate the intentions, implications, and opportunities for the alignment of such methods with client engagement, as they are perceived and addressed in the practice of service design professionals.

1.5. Contribution

This study was intended to contribute to (1) an understanding of how service design consultancies are employing design methods and expertise to adapt to the evolving design industry, the service economy, and their organizational relationships therein; (2) an expanded comprehension of participatory design and its uses; (3) a developing case for interdisciplinary design collaboration.

CHAPTER TWO

LITERATURE REVIEW

This chapter will provide a review of the relevant literature, which will include an overview of participatory design methods, service design practice, and the organizational context of each, with particular attention paid to that of design consultancies. Participatory design will be explored as a set of methods that appropriately introduces non-designers to the unique qualities of design practice through constructive project-oriented involvement. The second section will examine the emerging practice of service design, and its ongoing consolidation as a discipline around commonly accepted problem areas and methods. Throughout these sections, the evolving organizational impact of design projects based on these methods and practices will be highlighted and, in the final section, the literature regarding the organizational integration of design competencies will be examined in greater depth. Taken together, this chapter will uncover the underlying theoretical relationships between participatory methods, service design practice, and the organizational implications of service design consulting that are represented within the extant literature.

2.1. Participatory Design

Design consultancies can package and demonstrate their value to clients through the offering of discrete capabilities. Participatory design has been used by designers across disciplines and project outcomes as a set of methods that coordinates goals of design research

and development, the authority of designers as expert facilitators, the empowerment of those involved and, thereby, the demonstration of the merits of a design approach.

Participatory design is the collaborative involvement of non-designer stakeholders (managers, producers, users, workers, etc.) in stages of the design process that are specified and facilitated by designers (Dust & Jonsdatter, 2008; Sanders & Stappers, 2008). Originally, Scandinavian participatory design sought to democratize workplace design to better represent the interests of affected workers. Later, these methods were adopted as a means of accelerating the design process through collaboration and, depending on the participants, accounting for user preferences and organizational capabilities and culture (Burns, Cottam, Vanstone, & Winhall, 2006; Dust & Jonsdatter, 2008). Such targeted involvement affects participants' conversations, behaviour, commitment, and motivation (Coughlan, Suri, & Canales, 2007), and fosters a sense of progress and a confidence in creative ability at individual, team, and organizational levels (Gerber & Carroll, 2012).

Design knowledge is manifest in characteristic mindsets, including empathy, openness, mindfulness, intrinsic motivation, embracing constraints, courage and vulnerability, positivity and optimism, and resilience (Fraser, 2012, p. 19). The idea of mindsets is more intangible than specific methods, but the two are mutually reinforcing at an individual level (Fraser, 2012) and also within the scope of a project, as illustrated by Brown's (2008) loop of inspiration, ideation (mindsets), and implementation (methods).

2.1.1. Design Research

The landmark article from Sanders and Stappers (2008) traces the origins of participatory design to design research, where the active participation of users evolved from traditional and

relatively passive research methods such as ethnography, interviews, surveys, and user testing. Typical user research methods regard samples of users as research participants, whereas participatory methods strategically involve users, welcoming contributions from the unique perspective of each participant as experts of experience within the existing scenario that the design project is addressing (Holmlid, 2009). The participants are considered both expert design participants and potential subjects of the design project. Participatory design may only involve consultation processes rather than directly collaborative outputs, which are characteristic of co-design methods, another subset of co-creation.

Users were originally involved in co-creation methods in ‘idea-generation’ phases, which continues to be the most popular implementation due to its early timing in the development process and perceived long-range positive impact. As the benefits to such collaboration become evident, some are now calling for participation throughout the design process (Ho & Lee, 2012).

2.1.2. Designers as Facilitators

Sanders and Stappers (2008) indicate that some barriers to the adoption of participatory design methods are becoming apparent as designers employ them more often, more consistently, with a wider range of participants, and more widely throughout the design process. Designers leading these methods are experts in their execution, staying abreast with their development and experienced in their practice. They should also be aware of barriers to their use and become experts in facilitating the participation of their non-design partners, including users (Luck, 2007). With this approach, designers can avoid compromising the unique value of design methods in order to make them more communicable. Instead, the practice and communication can be intertwined through the recognized process of facilitation.

One of the barriers to corporate adoption of participatory design methods has to do with the methods' original research purposes and orientations (Sanders & Stappers, 2008). To some organizations, research is traditionally seen as a costly process of expanding possibilities rather than as a step toward the development of a specified, ready-for-market offering. This perception may be changing in the context of a growing knowledge economy and designers should be able to express the value of participatory design methods, and applied design research as a whole, in these terms.

The researchers go on to describe additional barriers to acceptance, including corporate aversion to widespread creativity and distributed initiative. To some organizations and those with traditional business background, these ideals of participatory design can represent a loss of control.

2.1.3. Experiential Involvement in Design Practice

The validity of involving non-designers in design activity stems from the notion that design intelligence is a distinct and widely found form of intelligence (Cross, 2007) and common intellectual activity (Simon, 1996). Exploring this idea, Sanders & Stappers (2008) break creativity into four levels: "doing, adapting, making, and creating" (p. 12) - in increasing order of expertise. They assert that individuals operate at different levels of creativity in different pursuits, depending on their expertise and interest. As expertise is developed through experience, returns increase and motivation is derived increasingly from inspiration and less so from productivity. For the professional designer, creative activities are integrated into unique design methods that support constructive and abductive reasoning (Kolko, 2011; Schrage, 2009). Through the use of unique methods of research, visualization, collaboration, and abductive

reasoning, designers respond to observed current user scenarios with projects that are intended to lead to preferred future scenarios (Simon, 1996).

Design knowledge is manifest in characteristic mindsets, including empathy, openness, mindfulness, intrinsic motivation, embracing constraints, courage and vulnerability, positivity and optimism, and resilience (Fraser, 2012, p.19). The idea of mindsets is more intangible than specific methods, but the two are mutually reinforcing at an individual level (Fraser, 2012) and also within the scope of a project, as illustrated by Brown's (2008) loop of inspiration, ideation (mindsets), and implementation (methods).

Cross (2007) outlines the difficulty in quantifying and communicating design practice, values, and intelligence without acknowledging and leveraging their inextricable intertwinement. Methods that are unique to design, and experience with these methods, may be necessary to fully understand the nature of design activity and a design mindset. Gerber and Carroll (2012) push this further, stating that "design is a learning process" (p. 65) that can be directly related to Kolb's experiential learning theory (1984, as cited in Gerber & Carroll, 2012). Prototyping, and other methods of visualization, constitute the "non-verbal codes of material culture" (Cross, 2007, p. 27) that are inherent to design intelligence. These codes can be compared to the numerical language of the sciences and the literacy of the humanities - each promotes distinct modes of thinking and concepts of what it means to problem-solve.

In a lineage of design researchers that have claimed the same (Simon, 1996), Kolko (2011) makes a contemporary reassertion that designers attempt to synthesize and resolve problems as systems that are characterized by their complexity; they search for meaning by making and doing. Through the creation of external representations of various aspects of both the

problem and solution, designers develop awareness of the connections between these factors, and self-awareness towards their own process and rationale (Cross, 2007; Schön, 1983). Such externalizations help designers to bridge tangible experience and abstract conceptualization, promoting knowledge creation and a sense of creative ability (Gerber & Carroll, 2012). This is a reflective process that seeks to take advantage of the subjectivity of the designers in order to use it proficiently as an interpretive tool (Kolko, 2011). The process becomes more efficient with experience, as patterns of meaning and practice are identified and anticipated across projects, and as skills are developed and refined.

Design practice values “appropriateness” above the concepts of truth and justice that are primary in the sciences and humanities, respectively (Cross, 2007). Gerber and Carroll (2012) and Schrage (1999) show how designers quickly develop and communicate knowledge of appropriateness through the creation of prototypes, which increases confidence, perceived control, and promotes commitment to the project. Rapidly iterated, low-fidelity prototypes are not regarded as precious artifacts, especially when multiple prototypes are developed in parallel. Their value lies primarily in their psychological effects as motivational tools, communication aids, and evidence of progress and ability. The experiential involvement in design methods is critical to their communication and appreciation.

2.1.4. Compelling Involvement

Drawing from such theories, research has explored the potential for participatory design methods to act as more than just a tools for design research, and toward their ability to serve as tools for the communication of the value of the design process through first-hand involvement of non-designers in experientially persuasive design activity. This notion is very closely related to

long-established ideas of the experiential, reflective nature of design activity (Schön, 1983). Schrage (1999) develops this concept by exploring it from the standpoint of designers' prototyping methodology, thereby demonstrating and examining design activity through the lens of a particular method.

Schrage (1999) discusses prototypes as tools for strategic introspection – reflecting upon practiced approaches to design problems can help to develop an understanding of organizational priorities, values, and perceptions of reality. In this way, design methods have been discussed as means through which to develop and examine individual design behaviour and organizational culture (Gerber & Carroll, 2012). According to Schrage (1999), a culture of prototyping encourages critical reflection on certain core assumptions: what is being prototyped, how it is being prototyped, and what is implicitly encouraged or considered taboo.

Like prototyping, involvement in other hands-on design activities can have benefits beyond the direct contribution to the development of the project (Coughlan et al., 2007). These include the perceived changing of context: from abstractions, theories, and specifications, to tangible objects. Therefore, design activities serve as experiential learning tools that permit individuals to explore new behaviours and ideas without committing to them with excessive time and resources (Wylant, 2008). This permission to explore also makes design methods effective tools for facilitating organizational change (Coughlan et al., 2007).

2.1.5. Participatory Design Practitioners

Participatory design incorporates an emancipatory ideology that strives towards the goal of “developing capacity and ability to empower the organisation to achieve local action” (Holmlid, 2009, p. 4). There is a moral argument that stakeholders have the right to

participation that enables them to control the creation of their own future scenarios. Thus, the relationship between the participating stakeholders, including the facilitating design experts, can be considered as an equally important aspect of the design project, or even as a project in itself.

Design researchers in co-design will need to lead, guide, provide scaffolds, and offer a clean slate for participants to feel comfortable and open to involvement (Sanders & Stappers, 2008, p. 14). Trained co-creation method facilitators can promote knowledge sharing through their engagement of stakeholders using hands-on techniques (Holmlid, 2009). In addition to the benefits of the resulting design insights, directly engaging users as co-creators may allow participants to feel pride and ownership over the process (Burns et al., 2006), thereby reducing the barriers to corporate acceptance of participatory design methods.

In these ways, participatory design methods are shown to be useful tools for the coordination of design activity and the communication of design value to non-designer stakeholders. The specific use of participatory design in service design consulting will be explored in a later section - *Participatory design in service design consulting*.

2.2. Service Design

Corresponding to the emerging service economy, some designers have organized themselves around a loose set of methods, clients, and projects, under the banner of Service Design. Service design reflects the implications that a wider economic shifts from manufacturing to information and service economies have within design industries (Mager, 2008). The ability to address human aspects of a service - “desirable, aspirational, compelling, and delightful” (Burns et al., 2006, p. 9) - is critical for organizations seeking to adapt and connect to their customers. A design approach provides means for such person/user-centricity, collaboration on complex

problems, rapidly iterative and adaptive process, and a creative approach with practical outcomes (Burns et al., 2006).

Books such as *This is Service Design Thinking: Basics, Tools, Cases* (Stickdom & Schneider, 2010), *Service Design: Practical Access to an Evolving Field* (Moritz, 2005), and *Service Design: From Insight to Implementation* (Polaine, Løvlie & Reason, 2013) have a strong orientation toward practice - as made clear in their titles alone. Their intended audience, subject matter, and contributing authors are largely comprised of service design practitioners. These books seem to be striving to unite conceptions of service design practice across the growing community of professionals, and are providing a reference point for how service design can be expressed through the described methods and tools as well as the related vocabulary. Academic interest is also growing. Wetter Edman (2011) provides a conceptual framework that “presents service design through five characteristics, as an 1) interdisciplinary practice, using 2) visualization & prototyping, and 3) participation as means for developing the design object, seen as 4) transformation, and 5) value creation” (p. 7). These characteristics are widely represented in the extant service design literature, including those mentioned above, and are explored throughout this section.

2.2.1. Knowledge-Intensive

Simply, and perhaps obviously, service design is the application of a design approach to the design of services (Holmlid & Evensen, 2008). Services may include physical components but are, as a whole, largely intangible and therefore have an increased tendency to be knowledge-intensive, “which means the tacit knowledge embedded in individuals or groups has an increasingly significant impact on the shaping of a service system” (Han, 2009, p. 9). Service

design is said to be situated across the “worlds of business, design, change management, and the service economy” (Saco & Goncalves, 2008, p. 10), and is fundamentally interdisciplinary (Saco & Goncalves, 2008). Service design is user-centered, beginning with the needs and experiences of users, and strives for the design of services that are appropriate to the implicated organizations, including the service provider (Holmlid & Evensen, 2008). This user-centered framework is largely shared with other disciplines of design such as industrial and interaction design. Therefore, service design can be seen as a comparable discipline that is distinct from these counterparts on the basis of their different project types. However, the in-practice development of the discipline has been given considerably less attention than its theoretical definition.

This observation is reflected in *Warts and All: The Real Practice of Service Design* (Akama, 2009). Akama (2009) responds to the academic washing out of practice-based knowledge by engaging in practice-oriented case study research. In direct response to the call for service design to develop a “clear consensus or an over-arching unifying framework” (Saco & Goncalves, 2008, p. 12), Akama argues that this approach is unrealistic and dishonest to the characteristic complexity of the knowledge represented by service design practice, which research should seek to preserve.

2.2.2. Service Design Practice

Reflecting a similar perspective, Kimbell (2009) undertakes direct observation of a service design consultancy as they conduct a service design project. Because it is still an emergent field, Kimbell (2009) does not expect to find formalized service design processes, and reports that none have been revealed through her observation. She hypothesizes that the adoption of service design by non-design organizations and disciplines will be required for such

formalization to occur, leading to the development of a fully-fledged service design discipline with governing institutions and communities of practice. However, she also recognizes that services designers are cognizant of the precarious and uncertain path to their acceptance and survival. “The transfer of knowledge, methods and tools between service designer and their clients” (Kimbell, 2009, p. 170) are said to be critical prerequisites to the stabilization and long-term survival of service design as a discipline. In fact, this can be seen in the brief history of service design already, as its establishment was largely driven by design consultancies responding to their changing economic context in an active manner (Saco & Goncalves, 2008).

In her discussion of the various levels of meaning that are addressed by the methods and design process of service designers, (Kimbell, 2009) hints at how these qualities may be leveraged to fulfill the need for service design discourse to stabilize and gain wider recognition. Knowledge and skills transfer between service design consultancies and their clients is said to be an increasing focus. The development of service design or broader human-centered design capabilities internally or within clients is briefly mentioned. However, it is done so with a degree of hesitation, weighing the benefits of disciplinary formalization with the risk of consultancies undercutting their own client base.

2.2.3. Stakeholder Involvement

Han (2009), like Kimbell (2009), expresses the importance of practice-based research in the area of service design, thus undertaking case-study research. Han (2009) also recognizes the processes of knowledge creation and sharing as central to service design. Han extends this notion to the point of stating that service design is defined by its complex social context, which designers must engage with, and respond to, with appropriate methods. Through a multiple case

study of British service design agencies, Han identifies two approaches for managing stakeholder involvement: leading and facilitating. These approaches are said to be fluidly employed, influenced to a great degree by the service designers' objectives of knowledge generation and dissemination. An example of this is the agencies' fundamental focus on supporting decision-making of their clients. This was said to arise from the designers' recognition that the service will be left to be run by the client organization who must, therefore, be competent in its delivery and familiar with the new service environment. Service designers were found to consider the delivery of the service as a critical aspect to the design of the service, and the engagement of stakeholders was considered regarding how it might contribute to this end.

The approach of service designers as facilitators was found by Han (2009) to be aligned with service designers' imperative to leverage the existing organizational structure of their client. Han's case studies revealed that the service design agencies aimed "to facilitate the local service providers to find their voice and claim ownership in the service system" (Han, 2009, p. 9). The approach of leading is related to the generation of knowledge by the service designers as in primary user experience research, which might be shared in subsequent facilitation-led phases of stakeholder engagement.

Han's study considers the engagement of multiple stakeholders as a whole, making little differentiation between them other than whether or not they are service 'users' in the traditional sense, as that category is identified as the basis for most previous studies on the engagement of stakeholders by designers. Despite acknowledging that clients are considered primary stakeholders, Han chooses to focus on the engagement of multiple stakeholders, including a range of internal client functions, external suppliers, even including a research question that

allows for the expansion of this list. Perhaps as a result, the study does not explore the specific methods utilized by the service designers beyond the broad categorization of engagement approaches into facilitating and leading.

2.2.4. Participatory Design in Service Design

Participatory design methods have been critical in the early development of service design practice and theory. Holmlid (2009) ties the two together through the perspective that, in service design, the tool-centered engagement framework of participatory design is resembled and developed into a system of coordinated and interchanging channels of engagement between customers and providers. This nested relationship sees participatory design methods used in the development of service design projects, in addition to being reflected in the participatory nature of service outcomes. These service outcomes are, in themselves, participatory - “a process, where value is co-created between customers and service organisations” (Holmlid, 2009, p. 2). Holmlid (2009) relates participatory design and service design through their shared tenets of emancipatory objectives, co-operative approaches, and engaged involvement. These principles are shown to be thoroughly intertwined in the service design “figure of thought that cooperation between actors sharing capacities and resource will leverage every actor, in the process, and toward their own and their shared goals” (p. 9).

Through case studies, Steen, Manschot, and De Koning (2011) explore the connection between service design and participatory methods further, identifying three types of benefits that co-design can have in service design projects: for the project, for the users, and for the organization(s) involved. Co-design does not strictly qualify as participatory design, but both are under the umbrella of co-creation (Sanders & Stappers, 2008), and share Holmlid’s (2009)

principles. The study regards case studies of user / customer involvement in co-design activities. It seeks to aid in the articulation of the diverse range of specific benefits that businesses are seeking from co-design methods, in order to enable their effective use and continued adoption.

The categorization of co-design benefits in service design projects by Steen et al. (2011) can be regarded as a useful framework for this study. A strong emphasis is made on the third area of benefit - for the organization(s) involved - including improvements in idea generation and long-term effects, which are said to be “independent of the actual service design project” (Steen et al., 2011, p. 58). There is a recommendation to develop means of monitoring and measuring the intended benefits, costs, and risks of co-design methods versus the actual project outcomes. This type of monitoring may be more explicit in a consulting process, where an outside agency may be required to address such factors at the outset of a project - as they compete for a contract - and be held accountable for them at the end.

In line with the previous studies’ commitment to practice orientation (Han, 2009; Kimbell, 2009), Blomkvist and Holmlid (2010) also appeal directly to the perspectives of service design consultants, here through an interview methodology with service design consultants as interview participants. The researchers reflect upon the implications of this research method, concluding that it generates knowledge about how the consultants want to be perceived, in addition to the primary consideration of how they actually work. Though the article, it seems as though the researchers recognize that their focus on the consultants’ prototyping methods is unnecessarily limiting - the terminology of prototyping seems to be expanded to include a wider set of participatory methods. These methods include role playing, storyboards, customer journey mapping, sketches, service blueprinting, personas, narrative, and mock-ups, and many more,

which are categorized under the headings of “Workshop methods,” “Visualizations,” “Other,” and “Technology interfaces” (Blomkvist and Holmlid, 2010, p. 6).

Blomkvist and Holmlid (2010) identify clients as the primary stakeholder in service co-creation and focus their study accordingly, representing a distinction from Han’s (2009) research, which generally considers the engagement of multiple stakeholders. Their study, seeking to represent the perspectives of service design consultants, explores service designers’ self-reported involvement of these stakeholders through prototyping methods that are therefore characterized as collaborative and participatory. They conclude that, through methods of prototype creation and evaluation that are mainly conducted in a workshop setting, clients are mostly considered as subjects rather than partners. As subjects, the clients are involved in prototyping as a means for service design consultants to address objectives of client emancipation and the sustainability of the consultants’ own businesses. Blomkvist and Holmlid (2010) indicate that there are various aspects to stakeholder involvement that can complicate the fulfillment of emancipatory objectives. These factors include the power relations between those participating - client and consultant as well as between internal functions of the client organization - and the economic realities of the project and the difference between client and consultant expectations.

2.3. Design at an Organizational Scale

The design process is increasingly recognized as having value toward developing and realizing many levels of corporate strategy (Bürdek, 2005; Lockwood, 2009; Sanchez, 2006; Seidel, 2000). Instead of, or in addition to, product specifications, businesses are looking to designers for process, methods and mindsets that are more broadly conducive to innovation (Fraser, 2012; Lockwood, 2009). Designers’ idea generation and development methods are

becoming recognized for such application. These include need finding, visualization, iterative prototyping, systems mapping, collaboration, co-creation, storytelling, and experimentation (Fraser, 2012). Such methods are central to designers' approach and synthesis of complex design problems, and have wide transferability. The organizational implications of service design projects outlined in the previous sections are also expanded upon in research that is not focused on participatory design methods, which are explored in this section.

Junginer and Sangiorgi (2009) elucidate three levels at which service design can impact organizations (service interaction design, service design interventions, and organizational transformation), which correspond to Rousseau's (1995, as cited in Junginger & Sangiorgi, 2009) Layers of Culture and Normative Contract, as illustrated in Figure 1.

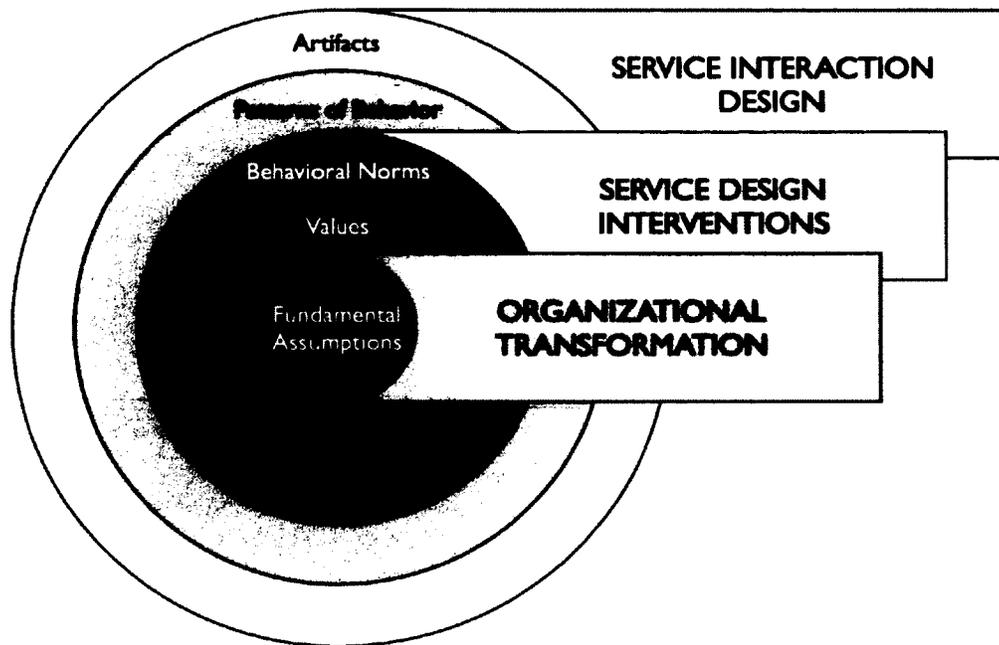


FIGURE 1 - Levels of potential impact of service design projects and layers of culture and normative contract - adapted from Junginger & Sangiorgi 2009, p. 4346 and Rousseau, 1995, p. 49 as cited in Sangiorgi & Junginger, 2009, p. 4341

Junginer and Sangiorgi (2009) recommend that service designers direct their projects toward transformational outcomes based upon this framework so that they may reflect upon their role within organizations. They suggest that, through such reflective practice, the organizational impact of service design projects can become more sustainable. As such, the researchers recommend that service designers develop a familiarization with methods and theories of organizational change. Despite this recommendation, the findings of their own study are oriented within a design perspective, derived from their case-study research of service design projects conducted within an educational / research context. Such a design-oriented perspective strengthens the relevance to the present study, but the significance of a the consultancy model for

service designers is left unattended other than the brief mention of a few notable firms.

However, this does not prevent Junginger and Sangiori (2009) from making the analysis that service design begins at the boundary of organizations, mediating interaction with users, which marginalizes the position of service designers within their service organizations, and limiting their impact.

The researchers assert that if service designers are to move into more central and impactful organizational positions, they must focus on three areas of development. The first is the development of trust relationships with stakeholders - perhaps based on collaboration - which may be encouraged through transparent communication of approaches and goals, the identification and targeting of key stakeholders / organizational gatekeepers, and the representation of a new perspective to spark interest. Secondly, related to this last point, is the development of transformative insights. This suggests that service designers must take the lead in having a more transformational role through the provocation and facilitation of deep organizational reevaluation based on a service design perspective. Lastly, the researchers suggest pilot projects as a means of opening the channels of communication with an organization, which can then be expanded through the strategic use of design methods. Additionally, they call for further study regarding “what kind of organizational changes current service designers engage in, how aware they are of their abilities and roles in relation to internal changes and how they respond to organizational resistance” (Junginger & Sangiorgi, 2009, p. 4347).

Wechsler (2012) provides some examples for the real-world implications of organizationally transformative service design projects. Transformation can empower internal and front-line staff to actively participate and contribute to making change staff, thereby

reducing barriers between the development of design recommendations and their implementation and delivery. Furthermore, client-side project managers are identified as having the potential to act as internal advocates and educators for the impact of the projects after the engagement with the service design consultancy has closed. Wechler (2012) writes as if addressing potential clients of service design consultancies, and advises them to prepare for such a partnership by establishing their expectations, and identifying and preparing the internal staff that will collaborate with consultants. These people should be responsible for perpetuating the frameworks and knowledge that the consultants leave behind, and should therefore be involved in its collaborative generation.

2.3.1. Organizational Engagement

Hands (2009) describes five stages of design engagement within an organization, beginning with the first stage of negligible understanding of design value. Businesses that operate at this level seek profitability through cost cutting. To them, the profitability and value of investing in the development of design capabilities is disputed and therefore too difficult to determine. The second stage uses design at what Joziassse (2008) calls the operational level. Here, designers are regarded as tools for product differentiation by way of restyling; inadequate resources are dedicated to foresight beyond this reactionary timescale. At stage three, a design department, manager, or project may serve as a touchstone for various disparate departments, through which they can be strategically coordinated. The role of design capability is elevated to the status of a core competence in stage four, where the capabilities of stage three are recognized as “a vital source of sustainable competitive advantage” (Hands, 2009, p. 53), which indicates

that it is acknowledged at the top levels of the organization. Finally, at stage five, organizations are design-led; design guides their long-term business strategy and vision.

The five stages put forth by Hands (2009) roughly correspond to Siedel's (2000) three stages of strategic thinking, in ascending order: functional, strategic business unit, and corporate. These are described in reference to the engagement between product design consultancies and their client organizations, but are relevant to the engagement of internal design actors as well. The product design consultancies investigated by Siedel were found to operate mostly at the mid-range strategic business unit level of strategic thinking, with aspirations for operating at the level of corporate engagement. This may indicate that they are aware of how their value to the corporation could be increased, but have yet to demonstrate it effectively.

Regarding organizational engagement through service design, Sangiorgi (2011) identifies transformation design as subset of service design that is leading the progression of the practice toward strategic transformative aims. RED Paper 02: Transformation Design, published by The Design Council of the UK (Burns et. al, 2006) outlined the characteristic methods and applications of this area. RED Paper 02 was framed as call to action, intending to attract designers to this emerging area of practice and to, therefore, heighten awareness regarding the organizational implications of service design. Along with RED Paper 01 (Cottam & Leadbeater, 2004), the Design Council explored a case study involving the development of a simple health service tool to facilitate communication between diabetes patients and their doctors - a project that clearly qualifies as service design. RED Paper 01 illustrated the strategic value of design methods and co-creation in nontraditional areas, while the RED Paper 02 addressed the co-

creation with front-line healthcare service providers as a transformative process for the client organization.

The utilization of design as a means of engaging organizations at a highly strategic, transformational level is not limited to service design. Junginger (2008) discusses ways in which product development can contribute to organizational change, and, naturally, the researchers within the field of design management are concerned with the ways in which design managers represent interdisciplinary links between design training and managerial responsibility at an individual level and also as the purposeful interface of the two disciplines within organizations (Borja de Mozota 2008, Gornick, 2008; Woudhuysen, 2011). Buchanan (2008) provides a broad overview of the many ways in which design practice can be thought of as a strategic tool with relevance to management, organizational change, and, in a broader sense, organizational design. This recognition has also been reflected, to a certain extent, by the discipline of organization science (Bouchard & del Forno, 2012; Dunbar & Starbuck, 2006; Yoo, Boland, & Lytinen, 2006). However, the most significant developments in the building of the interdisciplinary bridge has been in the area of service design, which tends to focus on the realities of professional practice and the relationship between design methods and organizational implications rather than relatively abstract, theoretical and rhetorical similarities.

2.3.2. Organizational Capabilities

Some consultancies have developed strategies to engage individuals of the client organization through directed and facilitated design methods (Coughlan et al., 2007).

Transformation design is closely related to service design, and aims to engage front-line service providers to develop organizational design intelligence (Burns et al., 2006). The design methods

employed here are experiential and persuasive, and are intended to affect how these service workers appreciate their roles as mediating between their users and the service system in which they operate. Ideally, client organizations of transformation design consultants receive the benefits of design-project-specific consultation (the design of a service) as well as the development of design-method capability and design-led organizational strategy.

This focus on design-methods capability is a development from other models of organizational design capability that, generally, did not focus on specific modes of action. Instead, these frameworks focused on the general need to align the operation of organizations with their users' needs and values through designed communications (Sametz & Maydoney, 2004), and to respond to the increasing pace, globalization, and experience / service orientation of their industries through the adoption of generally design-inspired approaches, such as the framework of design thinking.

2.3.3. Design Thinking and Innovation

Wylant (2008) describes design and innovation as versions of professionalized creativity. Similarly, design thinking offers a professionalized framework for critical, deep thinking to embrace and leverage complexity rather than for merely managing it (Hackett, 2009). In another significant attempt to align design thinking with operational language, Brown (2008) refers to it as a tool and - within the same article - as a discipline and as a methodology.

Design thinking has established common ground between design and business world (Brown, 2008; Martin, 2009) and has gained popularity in the management community (Cooper, Junginger, & Lockwood, 2009). Through design thinking literature and education, businesses have begun to gain familiarity with some aspects of design intelligence, as well as exposure to a

select design lexicon (Bruder, 2011). However, realigning the discussion of design thinking with design activity and methods may help to refocus often lofty and ambiguous design thinking vocabulary with actionable value (Woudhuysen, 2011). Design thinking entails several dilutions to design principles that undermine its value: a dualism between thinking and acting, a neglect of the diversity of design practices, and the privileging of designers as the main agents (Kimbell, 2011). In order to take advantage of the inextricable link between design intelligence, practice, and the communication thereof (Cross, 2007; Gerber & Carroll, 2012), research has called for a focus on design practice as a more actionable and effective means (Kimbell, 2012; Meyer, 2011) than the relatively passive methods put forward by design thinking (Carr, et al. 2010).

Steelcase President and CEO, James P. Hackett (2009) finds design thinking to be a path to business “fitness”, which is itself a framework through which to analyze a business as a complex system. Hackett regards innovation as an attractive principle, but one that is susceptible to uncertain cycles of highs and lows. These can be mitigated by the wider perspective offered by a focus on fitness, which creates an environment for sustainable innovation (Hackett, 2009). This distinction between innovation and fitness is similar to the one made between organizational performance and health by Keller and Price (2011). The former is desired, but should be arrived at through the latter in order to ensure a sustainable advantage. As the terminology implies, the concepts of health and fitness involve regarding the corporation as a living, dynamic system. The management of such a system necessitates a holistic approach that seeks to coordinate the constituent parts, and the relationships thereof, rather than the supposed optimization of each in isolation.

In one example of how such a system can be unpacked into useful constituent parts, Davila, Epstein, and Shelton (2006) describe that innovation arises from the coordination of business model change and technology change. Technology change is said to often cause business model change, and vice versa. Therefore, it is advised that they are addressed and considered holistically. The authors break these categories further into six levers of innovation, three of which are under business model innovation - value proposition, supply chain, and target customer - and three of which are under technology innovation - products and services, process technologies, and enabling technologies. Product and service offerings are said to be the most obvious and expected form of innovation, including entirely new technological features and offerings. These may be driven by process technologies, which improve the efficiency of manufacturing or service delivery, or by enabling technologies, such as information management systems, that allow organizations to “leverage time as a source of competitive advantage” (Davila, et al, 2006, p. 37). The three business model levers to innovation are defined as follows (Davila et al., 2006, p. 32):

- Value proposition: what is sold and delivered to the market.
- Supply chain: how it is created and delivered to the market.
- Target customer: to whom it is delivered.

Davila, Epstein, and Shelton (2006) indicate that the organizations should strive to integrate these six levers both conceptually and practically, and that failure to do so can undermine otherwise outstanding efforts in any individual category. In this way, the relation to Keller and Price’s (2011) notion of holistic organizational fitness is apparent. Such literature demonstrates that the value of leveraged complexity and systems-thinking is present in business-

oriented literature apart from the contribution of design thinking. Hackett (2009) has described design thinking as a path to these over-arching objectives rather than as an alternative framework. In this light, the movement toward practice-oriented design research (Kimbell, 2012; Meyer, 2011) - regarding the methodological and practical realities of these mindsets - appears to be synchronous and constructive with the interdisciplinary dialogue in this realm.

2.3.4. Consulting

Much of the examined literature has considered the practice of designers as they interface with client organizations as design consultancies that are organizationally external to client organizations. Some studies explicitly state this focus and conduct studies with design consultants, while others acknowledge this context as the real-world scenarios that their research workshops seek to simulate. This role of consulting is found to have a few distinguishing characteristics. Feldman and Boulton (2005) explore the potential for design consultants to fulfill a role model position in catalyzing organizational change for their clients, beginning with the first step of transformative change: disconfirmation. From an internal perspective, it is difficult to refute underlying assumptions that inform an organization. However, disconfirmation can arise from interaction with design consultants and their disruptive, deep, or unexpected insights, or exposure to their unique approach and methods. In addition to an external, disconfirming perspective, design consultants can also provide the other two aspects necessary in creating a motivation to change: survival anxiety and psychological safety. Design consultants' unique expertise can be reassuring to organizations and represent a way forward from their current state.

Concluding from their case-study research, Feldman and Boulton (2005) assert that design consultancies enable organizational change by engaging them in parallel learning. Parallel

learning refers to the involvement of a team from the client organization with the idea that “removing the team from central management frees them from cultural pressures and expectations and offers greater autonomy for experimentation with changes” (Feldman & Boulton, 2005, p. 42). The researchers encourage the clients of design consultancies to embrace this mode of consultant action in order to encourage exposure, adoption, and propagation of new perspectives. Design consultancies are recognizing and pursuing their value in this function (Hoo Na & Boulton, 2010), and adapting from “reactive brief-takers to become proactive and provocative thought-leaders, stimulating clients with new ideas and solutions and acting as a strategic annex rather than a supplier” (Sands, 2008, p. 57 as cited in Hoo Na & Boulton, 2010).

Siedel’s (2000) research is restricted to the consideration of product design consultancies rather than service design consultancies, but he finds that they too aspire to operate at a high level of corporate engagement. In attempts to communicate this value to non-designers, the need to move from "magic" towards explicit capability is obvious (Kolko, 2010). In order to reach their aspirations for strategic partnership and impact with their clients, design consultancies should strive to simultaneously demonstrate the value of a design approach and impart design knowledge and skills (Fraser, 2012).

In other disciplines of consulting, such as management consulting, relationships are central. Consultants must develop their relationships with clients and assert their authority and trustworthiness in order for their interventions to be effective and positive. Assuming that the consultancy expertise and the client interest are aligned, a teacher-learner relationship between the two parties is an important factor in the success of a change project (Chrusciel, 2004). The establishment and recognition of this relationship may be difficult to achieve, however, as consultants typically value such relationship factors while clients value contractual factors in the

assessment of project success (Fullerton & West, 1996). Fullerton and West (1996) also stipulate that management consultants believe that their credibility, in the eyes of their client, is a major factor. The researchers state that this entails Covin and Fisher's (1991) themes of interpersonal fit and company fit, to which they add a third theme: "the importance of establishing ground rules for the consulting process" (p. 40). These themes share a concern for the client-consultant relationship and links with organizational culture (Kakabadse, Kakabadse, & Louchart, 2006).

In regards to change management consulting, a high level of trust in the client-consultant relationship drives clients' commitment to partnership projects (Ben-Gal & Tzafrir, 2011). Capable design consultants can address issues of trust through their well-practiced design approaches by reorienting their human-centered expertise from users to clients, and develop such trust through targeted involvement (Feldman & Boulton, 2005). Such parallels can be found between the objectives of design consulting and management consulting, where success relies on the consistency and alignment of communication, organization, and processes (Barbaroux, 2011). The change management concept of "process consultants" who "pass on methods, approaches and values" (Fullerton & West, 1996, pp. 40) resembles the shift to designers as facilitators that was discussed in earlier sections of this literature review. However, while cues can be taken from a management perspective, a distinction must be made between a design approach and a management approach in order to advance a design perspective in research (Bouchard & del Forno, 2012). These should be thought of as fine distinctions between two convergent perspectives (Borja de Mozota, 2008), rather than a forced, and therefore compromising, amalgamation of two divergent perspectives. The study of client engagement would benefit from a uniquely service design perspective that is grounded in the specific practices of design consultancies.

CHAPTER THREE

METHODS

This research investigated the participatory design methods of service design consultancies, and the intentions (subjective meanings), implications, and opportunities behind these methods, regarding organizational integration and client engagement. Such social roles and professional environments are social constructions shaped by dynamic social identities. Correspondingly, the methodological approach of this research was grounded in a practice-oriented constructionist theoretical framework. This entailed the use of the qualitative methods of in-depth interviews, content analysis, and surveys. Certain quantitative aspects exist in these methods, however they were neither statistically relevant or appropriate to the study. The thesis addressed the following question (Q) and subquestions (SQ1, SQ2):

- Q. How are approaches to participatory design methods among service design consultancies contributing to the emergent definition of service design?
- SQ1. To what extent do service design consultancies leverage participatory design methods for objectives of organizational integration and client engagement?
- SQ2. To what extent is there a conflict between the authority of design expertise and the democratizing and empowering ideals of participatory design?

The chosen research strategy was appropriate to such qualitative research questions, which regarded the practice of service design consulting as an emerging area of practice. The

evolving qualities of its emergence are experienced most directly by service design consultants, who are immersed in the unique methods of service design, and actively participating in the definition and redefinition of the practice through their own activity. Therefore, the chosen research methods were intended to access the embedded expertise of these practitioners, and also to provide a degree of reflection that is not possible to those so intimately intertwined with the practice of service design consulting.

Semi-structured, in-depth interviews were utilized as the primary method of data collection, based on their ability to generate a deep and sustained dialogue between the expertise of the research participant and the researcher. Six interviews were conducted, a sample size that provides a degree of variability while remaining sufficiently manageable for the nuances of their individual perspectives to be preserved through the analysis and reporting of the research. Interview data was analyzed across cases, with passages from transcripts arranged into emergent categories. Findings from interviews drove the survey and content analysis research methods that followed. Survey questions were developed based on the interview findings and were directed at the same category of participants, seeking to enrich the investigation of topics that were touched upon in the interviews. The researcher conducted content analysis of the websites of the consultancies that were represented by the interview participants. This data was analyzed in a manner similar to that of the interview analysis, with the addition of descriptive details.

This chapter discusses the conduct of each of these methods, including their setting, the selection and recruitment of participants, and the procedures for data collection and analysis. These methods enabled the researcher to address the embedded perspective of service design consultants, with the richness of their explicit and implicit knowledge intact. Considering the

socially-constructed, evolving, and emergent nature of the information sought, it would have been less appropriate to approach the research questions of this study through quantitative methods. The research methods that were utilized enabled the study to address the perspective of the studies service design consultants through their own words and self-representations. Through such methods, the construction of knowledge in the study was designed to resemble that in the lived professional context of those studied.

3.1. Ethics

The study was approved by the Carleton University Research Ethics Board. The risk to research participants was deemed to be minimal, considering the nature of interview and survey involvement required of participants and the professional nature of the subject matter. The potential professional sensitivity of some topics was acknowledged in the research ethics clearance process. Accordingly, participants were informed of their right to request that their name not be used in the reporting of the research, to decline to answer any question, and to request that certain answers, or portions thereof, be omitted from the study. Research participants were also provided with information regarding the purpose of the study, the research personnel, and the task requirements of their requested participation. Each participant voluntarily consented to participation in the study.

3.2. Method 1 - Semi-Structured Interviews

Interviewing is a qualitative method that is suited to a constructionist research framework. The interviewing method itself is an encounter that embodies the socially constructed nature of the general relationship between researchers and their subjects.

Interviewers are participants, along with the interviewees, in the discursive co-construction of knowledge, which includes, and is influenced by, the socially constructed relationship of the interviewer and interviewee.

Semi-structured interviews allowed for flexibility through the use of an interview guide as opposed to the scripts utilized in structured interviews. The guide served to remind the researcher of the areas of interest to which the interview could return to if the discussion wandered excessively. This guide included a list of headings and roughly worded questions that could be rephrased in order to be appropriate in the immediate context of the interview conversations as they occurred. In contrast to the question-focus of structured interviews, semi-structured interviews are content-focused. As a result, the interview questions included in the interview protocol were only asked when appropriate to the flow of the conversation and modified to suit the given context as needed. This prioritization of conversational flow and content-focus allows for in-depth topics to be examined based on the tendencies and interests of the interview participant rather than truncating the depth of their responses with abruptly changing topics and the interjection of entirely pre-scripted questions.

Interviewing was chosen as a means of elucidating a level of complexity that is inaccessible to less rich and responsive methods. Further than this, interviews enable the preservation and reflection of the complexity and nuance of varied perspectives. Following this strength of the method, interviews were deemed suitable to the practice-orientation of the study, which sought to address the perspectives of practitioners, which are highly subjective.

3.2.1. Setting

Semi structured in-depth interviews were conducted via Skype voice chat services, with the exception of a single in-person interview. Skype was chosen due to its accessibility, as it is available to download and use free of cost, which was especially relevant given the international locations of the interview participants, including the United States, Sweden, and Spain.

Participants were first contacted via email in order to inform them of the details of the study, invite them to participate, and establish an acceptable date and time for the interview. The in-person interview was conducted at a cafe in Toronto, Canada, at a time and place convenient to the visiting participant.

3.2.2. Sample / Participants

The consultancies were purposively sampled based on available evidence of their history of service design projects and their fit with the working definition of service design used within the study. In some instances, design consultancies did not share the service design terminology utilized in the study. However, their projects - presented on their websites, design blogs, and other popular media - gave evidence to the design of service systems. Furthermore, the researcher considered their public reputation and association with the area of service design, as well as their affiliation with service design professional organizations. All of the consultancies represented by interview participants were members of the Service Design Network, “an international network of organisations & businesses working in and developing the Service Design domain” (Service Design Network, n.d.). This was not a strict requirement for participation, as there is no apparent criteria for organizational membership, but is served as a reassuring affiliation nonetheless.

The participating consultancies typically involved a variety of in-house design capabilities, coordinated and focused toward the user experience aspects of a multi-touchpoint system of interactions between organizations and their customers. Consultancies were identified according to the attributes defined within this study. Their work was represented on their websites as occurring on a project basis, with a variety of client organizations, representing a diversity of industries and internal design competence.

Candidate consultancies were first approached by email with an invitation to participate in the interview phase of the research (Appendix A). Where possible, individual candidates were identified as potential interview participants and contacted directly. These candidates were selected based on their professional title, history of experience and activity, and history of publication in the area of service design, to the extent that this could be ascertained through online means. Consultancies that were identified as being eligible to participate in the interviews, but that did not respond to the interview invitation, were also contacted with invitations to distribute the survey among their service design professionals. Table 1 provides an overview of the six consultancies that agreed to participate, and their respective interview participants.

Consultancy	Interview Participant	Participant Job Title	Head Office Location
Adaptive Path	Jamin Hegeman	Design Director	USA
Bridgeable Solutions	Christopher Ferguson	Chief Executive Officer	Canada
Designit	Ione Ardaiz	Service Designer	Denmark
Doberman	Anders Frostenson	Global Account Director / President Doberman NYC	Sweden
Transformator Design	Erik Widmark	Service Design Director	Sweden
Veryday	Niklas Wolkert	Interaction Design Strategist	Sweden

TABLE 1 - Interview Participants

3.2.3. Data Collection / Procedures

Each interview participant was interviewed once, with the interviews conducted between January 27 and February 4, 2013. In order to establish the research focus, the participants were provided with details of the study prior to the interviews via email correspondence, including a standardized Informed Consent form (Appendix C). This document included the purpose of the study, the details of what their requested participation would involve, and contact information of the researcher and Carleton University's Research Ethics Board. The participants were informed of their option to decline any question, have their identity anonymized in the study, or to withdraw from the study completely. A brief overview was also provided at the outset of the interview, in order to reinforce the context of the study, and participants were encouraged to ask for further clarification if they pleased. The researcher requested the oral consent of each

participant to participate in the interview, to have their identifying details - including their name - used in the reported findings, and to have the interview audio recorded. The length of the interviews ranged from 27 to 68 minutes.

Audio recording was achieved through the use of computer software and reduced the need for researcher note-taking, thereby enabling the undivided attention of the researcher toward participating in the interview. This strategy was chosen in order to enable the researcher to dedicate their attention to the interview participant, and to construct insightful, probing follow-up questions through a general conversational awareness, generally maintaining a more natural interview cadence. Such factors were critical given the semi-structured, open-ended form of the interviews.

3.2.4. Data Analysis

Audio recordings of the interviews were imported to the NVivo software environment. This program enabled the transcription of the interviews in timed segments, so that the audio recordings could be easily reviewed alongside the transcriptions in order to ensure accuracy and maintain the researcher's awareness of the original context of the responses. Verbatim transcriptions were made from the audio recordings, with the omission of non-relevant wrap-up discussion that took place at the end of some interviews. Verbatim transcriptions were utilized in order to allow for the natural emergence of themes through analysis, rather than summarizing the interview data in the course of the interviews or early in the analysis procedure.

The researcher analyzed the transcripts by identifying the themes represented in individual passages and sections of each transcript. As each transcript was read, and themes were manually identified and recorded as keywords, theme groupings and hierarchies began to

emerge. These thematic areas and hierarchies were reflected in the visual arrangement of these keywords in NVivo. The keywords were rearranged and reworded as each interview was analyzed. After the research had coded each interview transcript, The researcher then reviewed the transcript passages that had been cited under each keyword. In this phase of review, passages were reassigned or cross-assigned to themes that may have emerged after the reference was originally addressed.

3.3. Method 2 - Surveys

3.3.1. Setting

Surveys were administered online using FluidSurveys, an online survey creation, distribution, and tracking tool. FluidSurveys' servers are based in Canada and are therefore approved by Carleton University's Research Ethics Board. This online survey format was also chosen based on the accessibility it provides to the creation of surveys with a professional appearance and sophisticated interactive elements. The survey creation tools are able to accommodate different question types, with specific parameters of interaction for survey participants. This was preferred over a paper-based survey instrument, as it encourages the survey participants to properly complete the survey. Furthermore, an online survey allowed for instantaneous international distribution, which was crucial considering the international distribution of the considered service design consultancies.

3.3.2. *Sample / Participants*

The 23 survey respondents represented at least 13 different internationally dispersed consultancies (some declined to provide this information), reported an average of five ‘years of service design experience’ - ranging from 1.5 to 16 years - and an average of 12 ‘years of design experience’ - ranging from three to 30 years. The categorizations of their reported educational backgrounds are show in Table 2. The number of responses shown in this table is greater than the number of survey respondents because some provided multiple answers, or answers that could be cross-classified. The ‘industrial design’ category includes responses indicating either industrial or product design. The ‘other & unspecified design’ category includes all other design responses, including ‘Master of Design.’ Responses including ‘information tech.’ and ‘computer science’ are categorized under the title ‘information’ in the table below. The remaining categories are defined based on the direct inclusion of those words within the responses.

Educational Background	Count
Industrial Design	9
Other & Unspecified Design	8
Information	4
Art	2
Business	2
Architecture	1
Psychology	1

TABLE 2 - Educational Backgrounds of Survey Respondents

As with educational background, professional titles were classified and, in some cases, cross-classified, into the emergent categories shown in Table 3. Responses that included words

such as ‘managing,’ ‘director,’ or ‘principal’ are included in the Lead category. Other Design includes responses such as ‘interaction designer’ or ‘experience designer’ and the Service Design category includes those who used this terminology. The Strategy category counts any responses that used the words strategy, strategist, or strategic.

Professional Title Category	Count
Lead	10
Other Design	7
Service Design	5
Strategy	5

TABLE 3 - Professional Titles of Survey Respondents

3.3.3. Data Collection / Procedures

The surveys were developed following the administration and analysis of the interviews and content analysis. Therefore, the interview participants were asked to distribute the survey to their design consultant colleagues within their own consultancies to aid in its distribution. Survey participants were also sought from consultancies other than those represented by the interview participants. Individuals were invited to participate via email in instances where their contact information was made available on their consultancies’ websites. Otherwise, a general public-contact email address was contacted and provided with a letter of invitation (Appendix B), which included details of the study and a request to distribute the survey to their service design professionals.

FluidSurveys’ survey creation tools allowed for the survey to be preceded by a downloadable Informed Consent form (Appendix D). The survey participants were required to

acknowledge this notice and indicate their willing participation in order for the survey contents to become accessible. The introductory notice also informed participants of the purpose of the study, provided the contact information of the researcher and Carleton University's Research Ethics Board, and informed them of their option to leave any question blank or to withdraw from the study.

The survey consisted of eight question groups, seven of which were multiple-choice, five-point Likert scale grids with the option of an open-ended text response supplement. The eighth section was a series of text-based fields regarding professional demographic information. The survey can be found in Appendix E.

3.3.4. Data Analysis

The Fluidsurveys system generated a pdf document for each survey respondent, containing their responses. The researcher transposed each response into a charting software program, which enabled more flexible and rich means of data visualization than those offered by the Fluidsurveys environment. The design of the survey was mirrored in the survey summary charts so that the researcher could relate to the context of the survey. The question matrices were replicated, and the number of responses for each question were summed and noted within these charts. The response grids were shaded according to the relative response frequency in each category. Each of the most frequent answers were shaded dark grey, with white numbers. Two other shades of grey were used to indicate responses that received 75% and 50% the number of responses as the most frequently selected option, in order of decreasing darkness. This process helped the researcher to become familiar with the data, as with interview transcription and coding. Furthermore, the visualization of relative response frequency (quantitative data) enabled

the researcher to gain a qualitative impression of the patterns and relationships within the data. Despite the numerical data, quantitative analysis was limited to nonparametric analysis, considering the subjective perspectives that the responses represent, and the limited statistical validity of the low sample size. The Likert scale was overlaid with an integer scale, from which the sample mean and standard deviation were calculated for each question. Considered together with the response frequency and percentage data, this researcher was able to discern a rich picture of the survey participants' collective perspective.

This mixed numerical and visual, nonparametric data representation provided several benefits. The shading provided a quick impression of response distribution within each individual question, and across each survey section, which was complemented by the standard deviation and sample mean data. Secondarily-shaded responses gave an impression of the direction of response dispersion / disagreement from the dark-shaded answer (the sample mode), which could also be compared to the calculated sample mean. Furthermore, the raw response frequency data was preserved and readily accessible, enriching the interpretation.

The researcher analyzed the cumulative responses by identifying patterns within each multiple-choice grid. As each grid was reviewed and shaded, patterns emerged regarding the most popular answer to each question, the level of dispersion between respondents for each question (standard deviation), and the contrast of these qualities across the questions within each section / answer matrix. The researcher then compared such patterns across the different question matrices to generate overall themes based on alignment and contrast between related question categories.

3.4. Method 3 - Content Analysis

Content analysis was utilized as a qualitative method that was aligned with the constructionist theoretical framework of the study, which allows for emergent meaning that is shared by those who construct it through practice. The firms' websites were regarded as contributions to this notion of constructed meaning, which are intended to be read and interacted with by clients. Thus, this method of content analysis reflects upon the shared construction of meaning between the websites and the clients, while simultaneously engaging in a similar construction. This method enabled the researcher to regard both the direct content of the websites, and also consider the client-oriented interactions that they may signal and contribute to.

3.4.1. Sample / Participants

The websites investigated were those of the consultancies that participated in the interview portion of the study.

3.4.2. Setting

Content analysis was conducted of the websites belonging to the consultancies that were represented by the interview participants. The websites were accessed on February 17 and 18, 2013. The text was collected from the main pages of these publicly available websites. Due to the lack of standardization between the websites, in terms of the arrangement of information and the title of pages, text was gathered from a range of web pages, with a focus on the central and more permanent content. This focus was determined by the research questions, which are concerned with the consultancies' general perception of and approach to participatory methods as

well as the engagement of their clients. Accordingly, examined pages of the websites included those with titles including About Us, Services, Capabilities, Work, Process, etc. These pages directly address the methods, processes, and underlying approach of the consultancies, and represent an element of the consultancies' self-representation for purposes of client engagement.

3.4.3. Data Collection and Analysis

The researcher interacted with these websites through this content analysis method, which was conducted in the context of this study after the completion of interviews with consultants of these same firms. Text was copied directly from the aforementioned central pages of the websites, and entered into NVivo software for manual thematic coding. As with the interview transcripts, themes were modified and rearranged as coding was conducted passage by passage. Once the contents of each website had been initially coded, the references were reconsidered by theme rather than by consultancy; they were reviewed, rearranged, and verified.

The webpages that were deemed as not part of the core content were not included in this direct textual analysis of copied text. Such pages included titles such as Case Studies, Careers, Events, Blog, Team, News, and the sub-pages that they led to. Observation of these pages was noted, and their subject matter was categorized in order to find thematic similarities across the six websites.

CHAPTER FOUR

RESULTS

This chapter presents the results from each of the qualitative methods used to investigate the participatory design methods of service design consultancies, and the intentions (subjective meanings), implications, and opportunities of these methods, regarding organizational integration and client engagement. The study was not intended to make a comparative analysis of consultancies, and therefore, their results are presented cohesively, as a representation of the state of the profession. The results from each method are presented separately.

4.1. Instrument 1 - Semi-Structured Interviews

The findings of the interviews are presented through “thick description” (Bui, 2009, p. 285), where explanations of the themes are intertwined with the interview responses from which they were derived. Through coding of interview transcripts, several themes are identified, as well as hierarchical or organizing relationships between them. Within the organization category of the role of participatory design methods in client-consultant relationships, the following themes are presented: planned and strategic, flexible and responsive, characteristic to service design, and aligning. The objectives of client-oriented participatory methods are also discussed: research, education, facilitation, and the coordination of these diverse objectives. The second organizing category is that of the consultants’ perceptions of service design, where three themes are presented: emergence, broad and complex implications, and suitability to consulting.

4.1.1. Participatory Design Methods in Client-Consultant Relationships

Planned and Strategic - All participants gave very clear indications that client engagement is a persistent and central objective, involving a variety of intentional processes, of which the consultants are highly reflective. This awareness was not demonstrated through a particular shared procedure. Any indication of pure and consistently applied methods was uncommon, even within individual interviews. On the contrary, participants demonstrated an appreciation for client engagement methods that are responsive to the particular applied situation of each individual client. They each have their foundational design-method “toolkit”, from which they draw upon in a unique manner with each project, depending on the project and client (C. Ferguson, personal communications, January 30, 2013; E. Widmark, personal communications, January 28, 2013).

Flexible and Responsive - The theme of flexibility in their participatory methods was intertwined with the complex, multidisciplinary, and somewhat unpredictable nature of their service design projects, which require client engagement for many different purposes, including research, education, and facilitation. Even within these categories of purpose, there was significant variability in their pursuit. The central thread was the reason for this variability: responsiveness to the client, enabled by the depth of understanding that is developed through their intentional engagement in direct participation.

Characteristic to Service Design - In this way, participants sought to provide maximum support to the capabilities of their clients. They extended their recognition of the integrated nature of design practice toward their client relationships, referring to their own capabilities as supportive and supplementary to those of their clients. This sentiment was not limited to the

business partnership between the design consultants and their clients. It was also evident in discussion of the design process itself. Their grounding in service design was often cited as being responsible for - or at least naturally suited to - the expansion of a design ethos to an organizational scope. As explained by Jamin Hegeman, the Design Director at Adaptive Path (personal communications, February 4, 2013):

“... especially in service design, these are not things that designers can do themselves. We do not have all the expertise, it isn't all about the craft of the product, necessarily. There are things that we need to have business, engineering, technology, and change management input on that we just don't know. In order to come up with a really good solution that addresses the myriad stakeholder requirements, we need to engage them along the way.”

Aligning - This statement also demonstrates another common theme within the topic of client engagement: alignment. Alignment may refer to the previously discussed flexible support of client capabilities, but it also included the goal of achieving internal alignment among the capabilities of a client, as well as the alignment of unified project support throughout the client's organizational structure. All three of these aims were discussed in terms of how they are approached through client-engaging participatory design methods. Or, more often, client-engaging participatory design methods were discussed in regards to how they enable design consultants to simultaneously and holistically approach such varied objectives.

4.1.2. Objectives of Client-Oriented Participatory Design Methods

A variety of objectives are addressed through the common thread of client engagement - often simultaneously. Participants spoke of research, education, and facilitation as objectives under the umbrella of client engagement.

4.1.2.1. Research

Niklas Wolkert (personal communications, January 27, 2013), an Interaction Design Strategist with Veryday, asserted: "... we never do participatory design with anyone, in a sense. We use the participatory creative process to help people express needs that they couldn't express with their normal vocabulary."

This statement discounts the definition of participatory design as a direct method of co-creation and emphasizes it, instead, as a research methodology. By providing a platform for client engagement, participatory methods were said to open a window through which insightful research may be conducted. Other interview participants provided elaboration on the nature of the needs referred to by N. Wolkert. They include the project needs, the capabilities needed for successful project implementation, as well as the need of the client to feel that the project is worthwhile and being undertaken in a responsible manner. Research for, and also of, the client is pursued through participatory methods, and seen by these service design consultants to be mutually reinforcing.

Erik Widmark (personal communications, January 28, 2013), Transformator Design's Service Design Director, provided an example of how design tools can serve as research tools once they involve the participation of clients. He indicated that customer journey mapping (Figure 3), when conducted with clients, is used in order to obtain a more complete understanding of the clients' expectations than the consultancy is able to ascertain through a traditional brief.

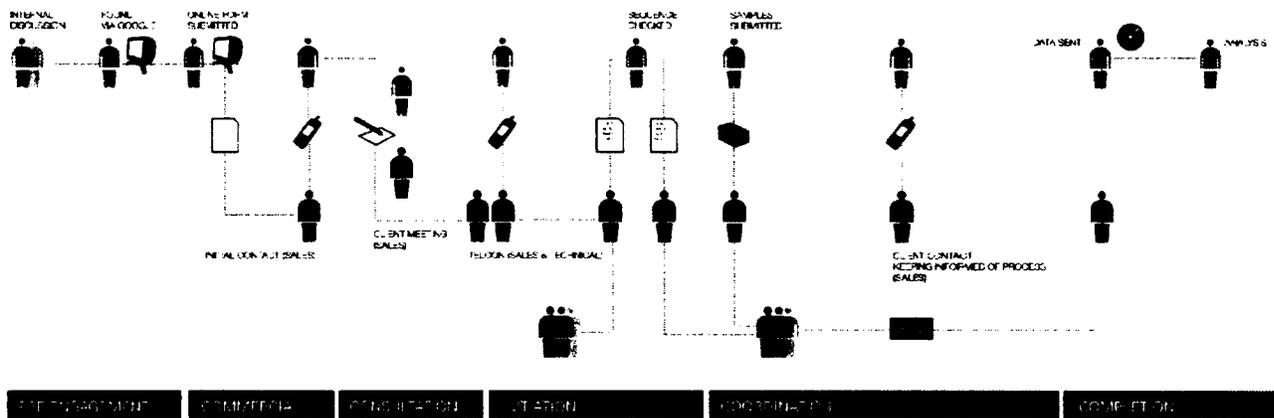


FIGURE 2 - Example of a customer journey map - Reprinted from Customer Journey Mapping in *Service Design Tools*, n.d., <http://www.servicedesigntools.org/tools/8>. Used with permission.

“A customer journey map provides a vivid but structures visualization of a service user’s experience. The touchpoints where users interact with the service are often used in order to construct a “journey” - an engaging story based upon their experience. This story details their service interaction and accompanying emotions in a highly accessible manner” (Stickdorn & Schneider, 2010, p. 158).

Ione Ardaiz (personal communications, January 31, 2013), a Service Designer with Designit, explained that clients may be able to describe their needs and capabilities, to a certain extent, but that they may be too intimately involved in order to directly address the underlying question of “why?” or to adequately reflect upon how their organizational norms might evolve.

Service designers are necessarily concerned with understanding these organizational capabilities, because they seek to cohesively engage these same capabilities in the design of the final service outcome. Jamin Hegeman (personal communications, February 4, 2013), the Design Director with Adaptive Path, acknowledged the implication that such capabilities must therefore be engaged in the design process “in order to come up with a really good solution that addresses the myriad stakeholder requirements.”

4.1.2.2. Education

The education of clients in the value of a design-led approach is critical for the consultants to feel that they are able to properly and openly take such an approach.

Buy-in - Erik Widmark (personal communications, January 28, 2013), as a Service Design Director, extended this notion of education down to basic terminology. His assertion is that the term “service design” is, in itself, a tool to begin developing an understanding of his consultancy’s approach based on “service” language, which is common ground between the consultancy and their clients. This title is a way to bring clients to a level where their commitment to a specific approach can be secured (N. Wolkert, personal communications, January 27, 2013), and its consistent use reassures clients that there is an appreciable underlying foundation of rigor (J. Hegeman, personal communications, February 4, 2013). The Global Account Director of Doberman (A. Frostenson. personal communications, January 29, 2013) made a similar connection in regards to Doberman’s process of recognizing their own practice in the vocabulary of service design, as it emerged.

Involvement in design methods is seen as key to such education. Engaging clients in participatory methods “gives our client organization a bit of insight into what we do, how we work, and how that differs from their ways” (E. Widmark, personal communications, January 28, 2013). Here, Transformator Design’s Service Design Director referred to having the client-side project manager “tag along” to user research interviews with the design team. His description that “sometimes they ask questions, or they are interviewing as well, and sometimes they are just listening in” indicates that there is much for the client to learn, and many ways for them to do so while engaged in the design process.

In order for this engagement to propagate education beyond the participating individual and throughout the client organization, it is critical to consider which individuals should be involved. A. Frostenson (personal communications, January 29, 2013) described this group of people as ambassadors of a design-led approach within the client organization, who are able to gain some perspective on their organization and drive change from within. I. Ardaiz (personal communications, January 31, 2013), the Service Designer with Designit, instead described them as “allies” who are capable of driving the project to implementation. This could include advisement on what they believe might resonate with their colleagues, or strengthening the case for a design proposal by developing it in collaboration with an internal business development representative (N. Wolkert, personal communications, January 27, 2013).

4.1.2.3. Facilitation

Broadly, participants spoke of facilitating an environment of reflection and reevaluation for their clients. They hope for their clients to discover for themselves, to as great an extent as possible, that a more design-led approach would be beneficial for their organization and the services they offer. In reference to facilitation, the tenets of a design-approach that were most commonly discussed were user-centeredness and open, multi-disciplinary collaboration. Participatory design methods that were discussed as helpful toward these facilitative ends included multi-disciplinary design workshops, service walk-throughs, and role-playing. The objective of facilitation is explored through three sub-themes: facilitating user empathy, design as facilitation, and facilitation of inclusion, ownership, and implementation.

Facilitating User Empathy - A. Frostenson (personal communications, January 29, 2013) recounted a simple workshop exercise that had participating client stakeholders call their friends

to ask why they do not read e-books. This exercise gave client representatives quick insight into the user realities of their service as well as contributing to their understanding of the service design consultants' methods. This example is demonstrative of facilitative methods because the consultants had no control over what insights the unwitting call recipients would offer. It allowed the clients to experience user research first-hand, in however small a sampling, and realize how such empathetic methods can reveal and challenge the assumptions that had been driving the workshop, and their business, up to that point.

Interview participants indicated that the objective of facilitation entails a certain degree of relinquished control. However, this was not a deterrent; it was spoken of as central to their methods, as well as being natural to and necessary in service design projects. The participation of clients here was critical, because explicit instruction is far outweighed by the experiential aspects for which the stage has been set. In line with A. Frostenson's phone exercise, Bridgeable CEO C. Ferguson (personal communications, January 30, 2013) expressed his goal of facilitating a closer relationship between the organization and their users, and some related participatory methods:

“We try as much as possible to bring the end user to the client. That's fundamental - how close can you bring stakeholders together? We brought clients into the field and watched patient / physician interactions. We brought them into peoples' houses and spent days with them. They might have a picture in their head, but we're trying to get to the nuance of the detail of what's going on in these peoples' lives.”

Design As Facilitation - The Design Director from Adaptive Path (J. Hegeman, personal communications, February 4, 2013) considered facilitation as an extension of design capabilities, applied in a context that differs only slightly from the traditional consumer-as-user frame of reference:

“...if you're a designer that is really empathetic, you can bring that empathy to, not just the people you're designing for. It depends how you interpret that - you're designing for the business, you're designing for the people in that business, and you're designing for the people that they serve. So with that empathetic understanding, it's easier to be that facilitator...”

The participants did not make a distinction between the roles of facilitator and designer. Designers are referred to, in some instances, as facilitators. However, facilitation was more often referred to as a shared activity, distributed among the consultancy, than it was as a discrete role. According to Doberman’s Global Account Director, A. Frostenson (personal communications, January 29, 2013), designers, project managers, account directors, or whoever at the consultancy is relevant to the current status of the project, may contribute to this activity in one way or another.

Participatory design methods facilitate conversations, experiences, and insights that were not specifically expected at the outset by the designers. While the outcomes may be unpredictable, the designers have extensive experience with design methods that involve similarly ambiguous and emergent problem definitions, and this uncertainty itself is common and expected. As facilitators, their guidance allows their clients to feel comfortable with an unfamiliar approach. I. Ardaiz (personal communications, January 31, 2013) described a project with a compressed timeline, where a satellite office, belonging to neither the client or the consultancy, was established in order to immerse the clients in design activity without the usual distractions. Their trepidation in the face of an unfamiliar approach was mitigated with constant support, both direct - the inclusion of designers in each break-out group activity - and indirect - constant visual evidence of progress, and the apparent confidence of expert designers.

Facilitation of Inclusion, Ownership, and Implementation - The above example reveals how the interview participants utilized participatory design methods as a means of facilitating a sense of the clients' personal inclusion and ownership in projects, thereby encouraging progression toward implementation of the designed solution. In order to do so, the consultants strive to foster an environment of democratic, open dialogue, where everyone's input is sought and valued. N. Wolkert (personal communications, January 27, 2013) the Interaction Design Strategist with Veryday, indicated that this objective is not only implied through participation in multi-disciplinary design collaboration, but that it can also be addressed explicitly, through targeted exercises:

“In workshops where there is a mix between top management and lower-level, we often have specific exercises to get everyone on the same level. Silly little exercises like drawing animals, for example, which are then presented. Then everyone sees that no one else is an expert, even the bosses.”

A widespread sense of ownership within the client organization is intended to reduce barriers to implementation of the designed solutions. A. Frostenson (personal communications, January 29, 2013), Doberman's Global Account Director, asserted that working in an inclusive manner, where a variety of stakeholders have input and are present for major developments and deliverables, fosters this attitude. I. Ardaiz (personal communications, January 31, 2013), the Service Designer with Designit, referred to the careful creation of a common conversation with all client stakeholders and participants, in order to give the sense of a process in which all stakeholders play a part. C. Ferguson (personal communications, January 30, 2013) described the ability of participatory design methods to foster a sense of inclusion as “equally important” to soliciting direct co-creative input from clients. This common goal of inclusion is pursued in

order to encourage a more horizontally collaborative environment through the establishment of a common frame of understanding and commitment.

Client participation is sought in order to reduce barriers to project completion and implementation. Bridgeable CEO C. Ferguson (personal communications, January 30, 2013) emphasized that an orientation towards output and execution is what inspires his consultancy's cross-functional client participation. In this way, he strives to establish and maintain a practical perspective on projects, shared with all parties involved, so that all the implications of implementation are anticipated and understood. He elaborated on this by declaring that the need to involve as many stakeholders as possible is a myth. Instead, he strategically focuses on those who will play key roles in implementation, and those who can provide familiarity of, knowledge of, and access to these stakeholders.

Again, I. Ardaiz's (personal communications, January 31, 2013) example of a project with a compressed timeline can provide useful insight. The hard deadline that she faced required a commitment to execution, which they interpreted as requiring almost constant client engagement, including participatory design methods. She also reiterated C. Ferguson's point of looking ahead toward implementation, identifying the client stakeholders who are capable of influencing organizational commitment, and involving them early in the design process so that they may be established as allies.

4.1.2.4. Integrating Diverse Objectives

None of the interview participants spoke of participatory design methods as being applicable toward only a single aspect or objective of client engagement. Instead, participatory methods were widely regarded as relevant toward research, education, and facilitation.

Furthermore, participatory design methods were discussed as tools that enabled these service design consultants to address such objectives simultaneously - not only in parallel, but in an integrated, coordinated manner. The interview participants seem to consciously appreciate these benefits of engaging clients through participatory design methods. They seek to employ these methods strategically and intentionally, but not rigidly. The set of methods is so wide that they are uniquely recombined in response to the specific context of each client and project.

Multi-Method Workshops - Most of the specific methods discussed by the interview participants were said to be conducted in the context of workshops designed and led by their consultancies. In the interviews, workshops included participatory methods of collaborative customer journey mapping, prototyping, and role-playing. There was an emphasis on experiential and empathic involvement between client representatives across disciplines and hierarchy and, occasionally, directly with users.

E. Widmark (personal communications, January 28, 2013) indicated that at the very outset of a project, Transformator Design consultants usually conduct a workshop involving the creation of customer journey maps. This gives the design consultants insight into how their client perceives the customer experience that they deliver, and the touch-points that they deem relevant. Through the course of the workshop, the customer journey is imagined from the perspective of different types of users, with specific needs, in order develop a sense of user empathy and an appreciation for the diverse manifestation of their service. Other interview participants also discussed the use of customer journey mapping as a tool for representing services as user-centered systems rather than organizationally- or technologically- centered (A. Frostenson, personal communications, January 29, 2013).

Role-playing was also said to be effective in instilling a degree of empathy for the user perspective by offering participants first-hand experience as a user. N. Wolkert (personal communications, January 27, 2013), the Interaction Design Strategist with Veryday, provided examples of both in-studio role-playing and in the context of the real-world service environment. He stated that, in this particular case, after user research had been conducted, “we knew exactly what the problem was... we needed to have a good way of convincing them of the problem,” and the best way to do so was to have them experience it for themselves. Prototyping was also discussed as a participatory method. Like customer journey mapping, it was referred to as an experiential tool to communicate the value of their hands-on, iterative design approach, and to provide an obvious separation between the regular work of their clients and their collaborative work with the design consultants. The visualization tools of the workshops were emphasized by J. Hegeman (personal communications, February 4, 2013), who advised “show, don’t tell.” For him, workshops provide an opportunity to immerse the client in the persuasive visual evidence of the design process, and in the large and inspiring physical environment of his consultancy.

Workshops are not solely utilized at the beginning of a project. In the same way that a start-up workshop might be used to launch a project, workshops were also said to be used at other project milestones, with specific participants and goals, as detailed by Doberman’s Global Account Director, A. Frostenson (personal communications, January 29, 2013):

“So you have a start-up workshop, which has all key stakeholders in the room, and that will set the tone, goals, major key deliverables, so everyone has to be there and feel ownership for that. And then you have more detailed workshops with fewer people - the core group... key members from the client, and a small group of key members from our team. Then you would have a second level of stakeholders from both sides, who would come in during the key workshops, when it's time to synthesize the insight process, or set the concepts - when

you're taking a step from one phase into another. And then you have a series of collaboration sessions in between with the core group.”

This diverse, strategic, and continuing use of workshops throughout the course of projects was indicated by other interview participants as well. A frequently used example was the use of a workshop after an initial phase of user research has been conducted. I. Ardaiz (personal communications, January 31, 2013), the Designit Service Designer, explained that her consultancy represents the perspective of the user, and that they must come equipped with the first-hand findings of their user research in order to properly advocate for real user needs. N. Wolkert (personal communications, January 27, 2013) shared this opinion, in his explanation that conducting user research beforehand allows his consultancy to identify particularly compelling service experiences, and share them in a manner that is relevant to the clients. C. Ferguson (personal communications, January 30, 2013) shared an example of a post-research workshop that was begun with a professionally acted play, which reenacted users’ experiences of health-care services that might not otherwise be accessible or to meaningful to client stakeholders.

As indicated in the above quote from A. Frostenson, the participation of different stakeholders is preferred at different points throughout the project. The Design Director (J. Hegeman, personal communications, February 4, 2013) asserted that the only consistent partner might be their immediate client contact and their team, if applicable. It would be ideal to also have some initial participation from executive sponsors and, beyond that, the composition of workshops can vary greatly, and the immediate client partner can help in the identification of relevant candidates for participation (N. Wolkert, personal communications, January 27, 2013). This Interaction Design Strategist also referred to collaboration with a client organization’s business development representatives in order to ensure economic viability of concept proposals,

and to reassure clients that due diligence has been done in this area. In some cases, Wolkert may alternatively collaborate with external management consultants for the same purposes.

4.1.3. Service Design

The previous Results sections provided detail of the ideas presented by the interview participants regarding participatory design methods for client engagement. Throughout their interviews, the participants also discussed details of their broader perceptions of and approach to service design, and the factors of their practice that shape their evolving relationship with the wider industry, including clients. The interview participants seemed to share the opinion that the practice of service design is still emerging and establishing itself in a variety of industries. As they continue to demonstrate the broad, organizational, and integrative capabilities of service design, these consultants feel that they are gaining clients' trust, if not complete understanding. They also reflected upon how their role as consultants might be suited to the practice of service design, how they strive to leverage this alignment to their advantage, and how they feel it has shaped their practice of service design.

4.1.3.1. Emergence

Traditional design disciplines and user-centeredness - A few of the interview participants made explicit mention of the recent emergence of service design, and how the practice's relative youth necessitates methods that can be flexible to clients with varying degrees of understanding. E. Widmark (personal communications, January 28, 2013), Transformator Design's Service Design Director, has been with the agency since their early days in 2006. He described that many clients now approach his consultancy for customer-centered evaluation and redesign of their

services, reflecting an appreciation for service design principles, but that it is typically driven by an individual within the client organization who requires help in propagating this message. J. Hegeman, the Design Director from Adaptive Path (personal communications, February 4, 2013) spoke of clients who are increasingly familiar with a human-centered design approach, partially due to the proliferation of internal User Experience design teams in digital industries. His agency also has such digital product design capabilities, and the success of this category of projects has lead to the gradual expansion of their scope, towards their complementary service design capabilities.

Such diverse design capabilities were very commonly acknowledged by the interview participants as contributing to service design projects, providing tangible output in service design projects, and sharing the user-centered core of service design. These capabilities were discussed as components of service design projects but also, less frequently, as separate, standalone teams with their own projects and clients. As put by J. Hegeman (personal communications, February 4, 2013), “digital products, interfaces, physical products, [and] graphic design are present, but are not the strict end result of the design that we do.”

A. Frostenson (personal communications, January 29, 2013) described his consultancy’s user-centered perspective as originating from their history in interaction design, which remains one of their central capabilities. The interview participants seem to share the opinion that it is necessary for their clients to experience a similar gateway to user-centeredness, involving gradual introduction and eventual widespread subscription, because this perspective is so central to a service design approach. I. Ardaiz (personal communications, January 31, 2013), the Service Designer at Designit, recounted her experience with a repeat client whose multiple projects with

her consultancy typically involved the design of customer-facing services. Eventually, they requested the consultancy's help in the development of processes for applying a user-centered approach autonomously and internally.

At the scale of a singular project, this process of gradually introducing a user-centered perspective is also present. N. Wolkert (personal communications, January 27, 2013), the Interaction Design Strategist with Veryday, referred to user-centered research as a tool that communicates to the client the user-centered imperative without having them fixate on specific product outcomes. They wish for their clients to realize the broad scope of user-centeredness, and they have various strategies for managing this message. A. Frostenson (personal communications, January 29, 2013) explained:

“It is very common, in the debrief process, that they come with a specific request within the digital field... app, web service... and we have to zoom out, together with them in dialogue, a workshop, or in some kind of conversation to make them understand... that we have to look at the whole customer journey, and that we have the tools and methodology to do that.”

4.1.3.2. Broad and Complex Implications

Client projects seem to be expanding and increasing in complexity. The consultants acknowledge that they do not have the full set of capabilities to independently undertake such projects, especially as they expand beyond the traditional areas of design and toward the more fundamental organizational factors of their clients. Participants spoke of the necessity of interdisciplinary collaboration, both within their own organization, and in their partnership with clients. C. Ferguson (personal communications, January 30, 2013), CEO at Bridgeable, also described how the interdisciplinary nature of his projects, amplified by the multi-touchpoint

nature of service design projects, introduces yet another discipline: the coordination of his clients' disparate organizational factors and capabilities.

4.1.3.3. Multi-Touchpoint Systems

A touchpoint is a “point of contact or interaction, especially between a business and its customers or consumers” (Oxford Dictionary, n.d.) and, for the interview participants, the existence of and coordination of multiple user-facing touchpoints seems to sufficiently constitute and characterize a service. Touchpoints, whether they be websites, kiosks, objects, customer support lines, retail environments, etc., are regarded by these design consultants as they contribute to the holistic system of the customer journey (N. Wolkert, personal communications, January 27, 2013), constituting a multi-touchpoint system. E. Widmark (personal communications, January 28, 2013) expressed a concern that some design consultancies use service design as a sales tool for their core specific design competence, whereas his consultancy is “channel independent” - they are dedicated to the multi-touchpoint system rather than predisposed to a specific category of design intervention or singular touchpoint. As a result, his consultancy defines itself through their user-centered process, rather than a particular design discipline. C. Ferguson (personal communications, January 30, 2013) made a similar point in making the straightforward statement that service design involves the design of a service, not a singular service component / touchpoint.

4.1.3.4. Organizational Factors

This definition of service design, characterized by its devotion to user experience across touchpoints and time, includes the design of organizational strategy, processes, and roles. Erik

Widmark (personal communications, January 28, 2013), Transformator Design's Service Design Director, explains: "Personally, I think the term Service Design is a bit too narrow. I think we do more than only designing services. We have people working with changing organizations, changing internal processes, or the strategy of a company."

For him and his consultancy, the development of service design capabilities within client organizations is seen as the next evolution of their offerings. Already, they are imparting portions of their service design mentality and methodology to their clients, both indirectly and directly, which sometimes involves a degree of organizational transformation. The Service Designer and the Interaction Design Strategist explained that this shift begins for some clients as a realization that they might use design methods to work together in certain aspects of their daily work, or as a creative exercise to gain a new perspective on a familiar problem (I. Ardaiz, personal communications, January 31, 2013; N. Wolkert, personal communications, January 27, 2013). However, according to Doberman's Global Account Director (Anders, Frostenson, personal communications, January 29, 2013), the transformative aspects of projects typically occur alongside, or as a consequence of, the designed services, and they need not be separated.

The most commonly expressed organizational objectives were the development of a widespread, shared understanding of the consultants' service design approach within the client organizations, and the expansion of the project scope. These goals were referred to as mutually-reinforcing, and as prerequisites to more lofty transformational aims. Such goals have been described above, under the Client Engagement section.

Bridgeable's CEO, C. Ferguson (personal communications, January 30), explained that his consultancy frames every project as a business challenge, while Adaptive Path's Design

Director, J. Hegeman (personal communications, February 4, 2013), referred to organizational challenges. The interview participants spoke of service systems as arrangements of organizational capabilities, and the touchpoints of these systems as interactions between the organization and its customers. For them, their process of service design necessitates the restructuring a of these organizational capabilities.

4.1.3.5. Necessitates Diverse and Flexible Approach / Methods

The interview participants spoke of a wide variety of design methods in their service design process, and regarded this variety as a strength. Furthermore, individual methods were not valued for the specificity, but for their ability to flexibly adapt for a variety of purposes and contexts. As with customer journey mapping, certain design methods may be used internally by the design consultants or as a participatory method with their clients, regardless of their level of service design understanding. The consultants expressed pride in their ability to tweak their methods depending on who is involved, and their ability to utilize these methods as tools for both design and communication, and the coordination thereof.

These design consultants perceive themselves as methods experts, with a wealth of experience in their appropriate and skillful use, manipulation, and development. E. Widmark (personal communications, January 28, 2013), Service Design Director with Transformator Design, expressed that he is comfortable with sharing his methods because he appreciates how difficult they are to master, and that their clients will need help in doing so. He referred to design as a handicraft, in which extensive experience is required in order to develop proficiency, as well as a trust in the often chaotic nature of the design process.

4.1.3.6. Suited to Consulting

In their mission to embrace and leverage the emergent complexity of service design practice, rather than suppress it, the interview participants regarded their position as consultants as critical. They believe that consultancy is defined by their expertise in facilitative, experiential, and flexibly responsive design methods, which enable them to provide their clients with an external and fresh perspective, and to manage its adoption.

Methods Expertise - Consultancies were said to be responsive to wide range of client needs, informed by their diverse experience, flexible methods, and small size. As described in the above section, the consultants' value the diversity of their design methods, and their ability to adjust their application to be uniquely appropriate for each client and context. These flexible methods are reflected in the consultancies' purported flexible organizational structure.

Consultants commonly take the roles of designer, researcher, and facilitator. I. Ardaiz (personal communications, January 31, 2013), a Service Design with Designit, explained: "We don't have units or departments. We're very flexible. We might each have specific knowledge, but we all work together. In the research process, the design process, throughout the process."

Doberman's Global Account Director (A. Frostenson, personal communications, January 29, 2013) illustrated the horizontal structure of his consultancy by describing the hands-on, co-creative method for determining their yearly budget using Lego workshops that involve each of the consultancy's 50 people. More directly, he also explained that there is not a specific service designer role within his consultancy. Rather, it is shared between interaction designers, account directors, design directors, and others.

Providing Fresh Perspectives - The ingrained models of operation within client organizations were referred to as having high inertia, requiring consultancies to inject a sufficiently disruptive perspective, affecting meaningful reflection, and resulting in an effective service design process. A. Frostenson (personal communications, January 29, 2013) explained that the “daily hum-drum” of the work of clients’ internal employees can force their focus toward narrow operational responsibilities, preventing them from considering the wide perspective necessary for proper service design.

Bridgeable’s CEO, C. Ferguson (personal communications, January 30), expressed the perception that many clients approach his consultancy in search of new ways of doing things, without knowing the specifics of what that might entail. He explained that clients approach his consultancy after they realize that their traditional way of doing things are ineffective. E. Widmark (personal communications, January 28, 2013) proposed that some organizations are beginning to realize the limitations of an approach driven by the analytical minimization of risk. He speculated that this has led them to a state of crisis where they may have been exposed to a customer-centered approach, attempted it themselves, and been confronted with their limited understanding. N. Wolkert (personal communications, January 27, 2013), an Interaction Design Strategist at Veryday, explained that client organizations respond positively to the perceived creativity of his consultancy, and are inspired by their involvement.

Managing the Message - The clients’ self-recognized unfamiliarity with a service design approach is said to afford the service design consultants a degree of trust from their clients. As consultants, external to the client organization and with limited project timelines, the interview participants feel that they have a high level of authority in dictating the process that will be taken

with their clients. I. Ardaiz (personal communications, January 31, 2013), a Service Designer with Designit, described that her consultancies proposals include details of methods that the client can expect, and when their involvement is required. Similarly, J. Hegeman (personal communications, February 4, 2013), the Design Director with Adaptive Path, explained that each interaction and workshop with the client is structured to achieve particular outcomes. C. Ferguson (personal communications, January 30, 2013), CEO at Bridgeable, discussed the corresponding need to maintain open dialogue to ensure that both parties have opportunities to express their expectations and current state of mind.

Through their external perspective of their client organizations, the design consultants gauge the readiness of their clients for embracing a service design approach. E. Widmark (personal communications, January 28, 2013) revealed that his approach to user advocacy has become “less extremist” in his recognition that a more diplomatic tack would encourage clients to contribute more actively, which enables his consultancy to have wider impact. Thus, consultants also seek to grasp their clients’ attitudes toward their intervention.

4.2. Instrument 2 - Surveys

This section includes a table for each survey question, which presents the results of the survey in a form that reflects its design, as presented to the respondents. The open text fields that followed each of the seven multiple-choice, five-point Likert scale grids were utilized by very few survey respondents. Therefore, these responses were discounted in order to avoid the overrepresentation of any individual’s perspective over that of the collective, for which the survey was designed.

The survey responses are illustrated in the order they were analyzed by the researcher. The tables present the number of responses received for each answer option (n), and the percentage of respondents that this is equivalent to (%), calculated from the total number of survey respondents (23), which is not always equal to the number of responses received for each individual question. Each point along the Likert scale was assigned an integer value from zero to four, from which the sample mean (\bar{x}) and standard deviation (σ) were calculated. These calculated values are presented within the tables in this section, as are the integer values assigned to the Likert scale, for reference.

4.2.1. Survey Section 1

The multiple parts of the statement “Clients approach your consultancy for...” are presented in Table 4, along with the compiled responses.

Client priorities: Respondents indicated that clients approach primarily for traditional design projects (interaction / product / web / etc.). ‘Service design’ and ‘collaboration facilitation’ are second, ahead of ‘service assessment / redesign.’ They are least often approached for ‘methods instruction,’ ‘development of internal capabilities / functions,’ or ‘organizational transformation.’

Clients approach your consultancy for...	Never (0)		In a minority of projects (1)		In about 50% of projects (2)		In most projects (3)		In all projects (4)		\bar{x}	σ
	n	%	n	%	n	%	n	%	n	%		
design projects (interaction / product / web / etc.)	0	0	1	4	5	22	12	52	2	9	2.8	0.72
service design	0	0	5	22	5	22	8	35	3	13	2.4	1.03
service assessment / redesign	1	4	6	26	7	30	5	22	1	4	2.0	1.13
methods instruction	1	4	13	57	4	17	2	9	0	0	1.4	0.72
development of internal capabilities / functions	0	0	14	61	2	9	3	13	1	4	1.6	0.94
collaboration facilitation (with internal or external partners)	1	4	5	22	5	22	8	35	1	4	2.2	1.04
organizational transformation	0	0	16	70	2	9	0	0	2	9	1.4	0.94

TABLE 4 - Survey Section 1 Responses

The responses regarding ‘design projects,’ ‘methods instruction,’ ‘development of internal capabilities / functions,’ and ‘organizational transformation’ had the lowest standard deviations, indicating a higher degree of agreement. The majority of respondents indicated that clients approach their consultancies mostly for design projects (‘interaction / product / web / etc.’). A majority of respondents also indicated that only in a minority of projects do clients approach them for ‘methods instruction,’ ‘development of internal capabilities / functions,’ or ‘organizational transformation.’ The options of ‘service design’ ($\bar{x} = 2.4$) and ‘collaboration facilitation’ ($\bar{x} = 2.2$) were indicated to be a client priority in over 50% of projects. However, these responses also had high standard deviations ($\sigma = 1.03$ and 1.04), indicating a relatively high variability from this perspective.

4.2.2. Survey Section 2

The second section of the survey focused on the consultants' perceptions of their clients' needs, in order to enable the examination of discrepancies with Question 1. The responses are compiled in Table 5.

From your perspective, the clients who approach you would benefit from...	Never (0)		Occasion-ally (1)		About half of the time (2)		Usually (3)		Always (4)		\bar{x}	σ
	n	%	n	%	n	%	n	%	n	%		
design service (interaction / product / web / etc.)	0	0	1	4	2	9	12	52	5	22	3.1	0.76
service design / redesign / evaluation	0	0	0	17	4	26	11	48	6	26	3.1	0.70
methods instruction	0	0	5	22	5	13	7	30	3	13	2.4	1.07
development of internal capabilities / functions	0	0	2	17	4	30	8	35	7	30	3.0	0.97
collaboration facilitation (with internal or external partners)	0	0	2	22	5	26	8	35	6	26	2.9	0.96
organizational transformation	0	0	5	9	2	26	8	35	6	26	2.7	1.15

TABLE 5 - Survey Section 2 Responses

Design Consultant Priorities: Respondents indicated they perceive that, more often than not, clients would benefit from each of the provided options ($2.4 \leq \bar{x} \leq 3.1$). Each category received a greater average value in this section, in comparison with the corresponding category in the previous section. Therefore, in each category, the respondents assess a greater need for the client than the client is said to show interest. This indicates a perceived discrepancy in the self-

reported needs of clients and those that are determined by the consultants. This was especially so regarding the respondents perception that clients would benefit from ‘development of internal capabilities / functions’ ($\bar{x} = 3.0$) and ‘organizational transformation’ ($\bar{x} = 2.7$), which differed from the mean responses in the previous section ($\bar{x} = 1.6, 1.4$, respectively) by greater than one standard deviation from either section 2 ($\sigma = 0.97, 1.15$) or section 1 ($\sigma = 0.94, 0.94$).

The highest levels of agreement can be seen in the responses regarding ‘service design / redesign /evaluation’ ($\sigma = 0.70$) ‘interaction / product / web / etc.’ design ($\sigma = 0.76$), which also received the highest average scores within this section ($\bar{x} = 3.1$), indicating consultants’ relative confidence in the potential benefit of these approaches for their clients. The greatest standard deviation is found in the responses regarding the perceived benefit from ‘organizational transformation’ ($\sigma = 1.15$), indicating a relatively high level of disagreement on this topic.

4.2.3. Survey Section 3

The third section of the survey regarded the consultants’ involvement of users in a variety of design methods. The responses are compiled in TABLE 6.

You involve the direct participation / engagement of users in...	Never (0)		In a minority of projects (1)		In about 50% of projects (2)		In most projects (3)		In all projects (4)		\bar{x}	σ
	n	%	n	%	n	%	n	%	n	%		
service design tools (customer journey mapping, service blueprinting, stakeholder mapping, etc.)	1	4	2	9	6	26	4	17	8	35	2.8	1.22
user research	0	0	1	4	3	13	6	26	11	48	3.3	0.90
ideation	1	4	3	13	5	22	6	26	6	26	2.6	1.20
workshops with other stakeholders	0	0	6	26	3	13	6	26	6	26	2.6	1.21
prototyping	0	0	5	22	5	22	4	17	7	30	2.6	1.20

TABLE 6 - Survey Section 3 Responses

Highly diverse methods of user engagement: The responses indicate greatly varied involvement of users in the design methods of consultants ($0.90 \leq \sigma \leq 1.22$). Despite this wide distribution, the response frequencies indicated that users are involved in each of the method options (except for ‘prototyping’), in (at least) ‘most projects,’ even though only a single category (‘user research’) received a response average greater than this threshold of 3.0 ($\bar{x} = 3.3$). The responses in the ‘user research’ category also had the lowest standard deviation in this section by at least 0.3 points ($\sigma = 0.90$). Therefore, there can be said to be a relative consensus in the direct of participation of users in user research in most projects.

The most frequent response for ‘prototyping’ was ‘in all projects’ ($n = 7, \% = 30$), but the responses were widely dispersed ($\sigma = 1.20$), with a high proportion of respondents indicating ‘in

a minority of projects' and 'in about 50% of projects' (n = 5, % = 22 in each). Similarly, in the 'workshops with other stakeholders' category, three options, over a span of four, received an equivalent number of responses (n = 6), resulting in a high standard deviation ($\sigma = 1.21$), which was common within this section.

4.2.4. Survey Section 4

The fourth section of the survey was similar to the third, with a focus on the consultants' involvement of clients, rather than users, in a variety of design methods. The responses are compiled in Table 7.

You involve the direct participation / engagement of clients in...	Never (0)		In a minority of projects (1)		In about 50% of projects (2)		In most projects (3)		In all projects (4)		\bar{x}	σ
	n	%	n	%	n	%	n	%	n	%		
service design tools (customer journey mapping, service blueprinting, stakeholder mapping, etc.)	0	0	0	0	6	26	8	35	7	30	3.0	0.80
user research	0	0	1	4	5	22	9	39	6	26	3.0	0.86
ideation	0	0	0	0	2	9	9	40	10	43	3.4	0.67
workshops with other stakeholders	0	0	0	0	1	4	12	52	8	35	3.3	0.58
prototyping	0	0	5	22	5	22	10	43	1	4	2.3	0.91
project scoping	0	0	1	4	1	4	3	13	16	70	3.6	0.80

TABLE 7 - Survey Section 4 Responses

Client engagement: Survey responses indicate that the respondents involve the direct participation of clients in ‘ideation’ and ‘project scoping’ more than the other options provided (\bar{x} = 3.4, 3.6). Only one category (‘prototyping,’ \bar{x} = 2.3) received an average response less than 3.0 (corresponding to ‘in most projects’). The responses suggest that respondents frequently involve the direct participation of clients in multiple design processes and methods.

Client- vs. user-oriented methods: The responses for each category in Section 4 had lower standard deviations than those in Section 3, perhaps suggesting a greater degree of formalization, confidence, or, alternatively, restriction in the appropriate use of these methods. Furthermore, only a single category (‘prototyping’ σ = 0.91), had a standard deviation above that of the lower standard deviation in Section 3 (‘user research’ σ = 0.90). The method categories of ‘ideation’ (\bar{x} = 3.4), ‘workshops with other stakeholders’ (\bar{x} = 3.3), and ‘service design tools’ (\bar{x} = 3.0) were indicated to be used more frequently with clients than with users (\bar{x} = 2.6, 2.6, and 2.8, respectively, in Section 3), while the opposite was found for the categories of ‘prototyping’ (\bar{x} = 2.3 vs. 2.6), and ‘user research’ (\bar{x} = 3.0 vs 3.3). ‘Project scoping’ was not included in Section 3, in accordance with the observations from the interviews.

4.2.5. Survey Section 5

The fifth section of the survey sought to examine the nature of the client involvement described in Section 4. The responses are compiled in Table 8.

You provide your clients with...	Never (0)		In a minority of projects (1)		In about 50% of projects (2)		In most projects (3)		In all projects (4)		\bar{x}	σ
	n	%	n	%	n	%	n	%	n	%		
opportunities to observe your design methods (passive)	1	4	5	22	2	9	7	30	6	26	2.6	1.29
facilitation through design methods	0	0	0	0	3	13	12	52	6	26	3.1	0.65
instruction in design methods	0	0	10	43	5	22	6	26	0	0	1.8	0.87

TABLE 8 - Survey Section 5 Responses

The nature of client engagement: ‘Facilitation through design methods’ was indicated by the respondents as the most frequent mode of engagement ($\bar{x} = 3.1$) and it was also the category with the lowest dispersion ($\sigma = 0.65$). ‘Instruction in design methods’ was indicated most frequently to be used ‘in a minority of projects’ ($n = 10$) but also to vary across the responses of ‘in about 50% of projects’ ($n = 5$) and ‘in most projects’ ($n = 6$), resulting in a mean response closer to ‘in about 50% of projects’ ($\bar{x} = 1.8$) and a larger standard deviation ($\sigma = 0.87$). The category of ‘opportunities to observe your design methods’ generated responses with a large standard deviation ($\sigma = 1.29$), indicating a wide distribution and general disagreement that is evident in the frequency counts as well. Therefore, facilitation can be said to be the most prevalent mode of client engagement.

4.2.6. Survey Section 6

The sixth section of the survey sought to expand upon the nature and design methods of client involvement described in Section 5 and 4, through investigation of the consultants' reported motivating intentions. The responses are compiled in Table 9.

You engage clients through design methods for the purpose of...	Never (0)		Occasion-ally (1)		About half of the time (2)		Usually (3)		Always (4)		\bar{x}	σ
	n	%	n	%	n	%	n	%	n	%		
research of the client (organizational capabilities, structure, etc.)	0	0	2	9	5	22	7	30	6	26	2.9	0.99
communication / alignment between yourself and the client	0	0	2	9	2	9	6	26	11	48	3.2	1.00
alignment between disparate internal functions of the client	0	0	2	9	4	17	10	43	4	17	2.8	0.89
development of clients' internal capabilities / functions	0	0	5	22	7	30	5	22	2	9	2.2	0.98
organizational transformation of the client	0	0	9	39	7	30	4	17	0	0	1.8	0.78

TABLE 9 - Survey Section 6 Responses

The intentions of client engagement: 'Communication / alignment between yourself and the client' was indicated by the respondents as the most popular purpose of client engagement through design methods ($\bar{x} = 3.2$), although responses did range from 'occasionally' ($n = 2$) to 'always' ($n = 11$), resulting in the highest level of responses within this section ($\sigma = 1.00$). The most tightly grouped responses ($\sigma = 0.78$) were received in the category that was indicated to be

the least frequent purpose of client engagement through design methods - ‘organizational transformation of the client’ ($\bar{x} = 1.8$), which received most responses under ‘occasionally’ (n = 9) and ‘about half of the time’ (n = 7). This was the only category with an average response below ‘about half of the time,’ indicating that survey respondents consider alignment, communication, and capability development to be frequent goals of client engagement through design methods.

4.2.7. Survey Section 7

In the final multiple-choice question matrix of the survey, the researcher aimed to assess the type of outcomes that result from the consultants’ projects. The responses are compiled in Table 10.

For clients, projects result in...	Never (0)		Occasionally (1)		About half of the time (2)		Usually (3)		Always (4)		\bar{x}	σ
	n	%	n	%	n	%	n	%	n	%		
long-term partnership with your agency	0	0	5	22	3	13	12	52	1	4	2.4	0.93
a discrete design outcome or specification (interaction / product / web / etc.)	0	0	5	22	3	13	12	52	1	4	2.4	0.93
service development	0	0	5	22	7	30	8	35	1	4	2.2	0.89
strategy development	0	0	6	26	6	26	5	22	4	17	2.3	1.11
development of internal capabilities / functions	0	0	13	57	5	22	2	9	1	4	1.6	0.87
organizational transformation	1	4	16	70	2	9	0	0	2	9	1.3	0.97

TABLE 10 - Survey Section 7 Responses

Project outcomes: The categories of ‘long-term partnership with your agency’ and ‘a discrete design outcome or specification (interaction / product / web / etc.)’ received equivalent frequency response profiles ($\bar{x} = 2.4, \sigma = 0.93$), indicating that survey respondents consider these categories to be the main outcomes of their projects. Even then, they average response is less than ‘usually,’ and are closely followed by ‘strategy development’ ($\bar{x} = 2.3$) and ‘service development’ ($\bar{x} = 2.2$). The responses in the categories of ‘development of internal capabilities / functions’ ($\bar{x} = 1.6$) and ‘organizational transformation’ ($\bar{x} = 1.4$) indicate that projects result in such outcomes less than ‘occasionally’.

4.3. Instrument 3 - Content Analysis

The studied consultancies utilize their websites to publicly communicate a range of information about their organization. Central themes observed on these websites included client collaboration, the complexity of design projects, the role of consultants, and the strategy aspects of their work. Collaboration with clients is said to be valued as a means of client education and empowerment, involving an ethos and language of openness that permeates many aspects of the consultancies, as represented by the websites. Complexity is described as a natural result of the characteristic multi-touchpoint composition of service design projects, and is said to be anticipated and competently managed by the consultancies’ interdisciplinary capabilities. The websites propose a wide breadth of experience in a range of user-centered problems, which enables them to demonstrate the value of this fresh perspective in an effective and impactful manner. Strategic capabilities are also discussed separately and extended to the point of distinct consultancy capabilities including strategy development and organizational transformation.

4.3.1. Client Collaboration

The websites of these design consultancies extensively address the nature and goals of their engagement with clients. They present messages of openness, collaboration, and the mutual advancement of both parties. A valuing of transparent processes is referred to both directly and indirectly. Methods are strongly represented on these websites and, regardless of the intentions - whether they be education, sales, sharing of best practices, etc. - that fact, in and of itself, indicates an intentional emphasis on openness. A very direct reference to this value can be found on the Adaptive Path website:

“We don't work our magic behind a curtain and then present it, leaving you wondering how we did it. We work side-by-side, out in the open, collaborating with our clients, introducing new ways of working and thinking as we go.”

The Designit website carries a similar message: “Who creates the solutions? We both do. By constantly exchanging knowledge, expertise and ideas with you, we ensure the result meets your goal. Because winning designs are born from winning collaboration.”

These excerpts illustrate how transparency is tied to collaboration, which is consistently presented as skill of these consultancies. They describe how they are able to employ customized design methods and more holistically-considered solutions through close collaboration with their clients. Only a couple of the websites mention that clients can expect this collaboration to take the form of workshops. More commonly, they discuss multi-disciplinary teamwork, based on an iterative, hands-on, generally design-led approach.

In addition to contributing directly to the design of a service, the websites link collaborative methods to various additional benefits for their client organizations. Such benefits

include their education in a design-led approach and in design methods, as well as the alignment and empowerment of their existing structure and functions.

4.3.1.1. Objectives of Client Education

Client education is phrased primarily as the development of capabilities; as the Adaptive Path website states: “Level-up your superpowers.” This is a description offered for their “In-house Training” services, which are delineated from those of Service Design, but related in that they promise to “bring internal teams up to speed and provide the tools and inspiration needed to deliver great experiences.” Bridgeable’s website uses the term “Experiential Education” to describe a critical step in “a journey from insight to impact.” Transformator Design, Doberman, and Veryday’s website place emphasis on helping organizations develop their customer-centered perspective. They indicate that, through their collaboration with clients, they intend to impart upon them valuable, lasting lessons about how to design and maintain services based on the adoption of their approach and methods.

4.3.1.2. Objectives of Client Empowerment

“We immerse ourselves in your company, past and present, and see what makes you tick. What makes you unique? We help you find the answer, and enable your brand to go from strength to strength.” This excerpt, from Designit’s website, utilizes language that emphasizes the existing capabilities of their clients. Furthermore, this message is reinforced by it being directly addressed to prospective clients, a virtually universal tactic among the studied web pages. Similarly, Doberman’s website states that: “True product and service innovation depends on the ability to engage and empower the people that deliver the experience: you.”

A similar message of client empowerment and broad, lasting impact is common to all studied websites. Again, this is communicated directly, as above, and more indirectly, through vocabulary that refers to the services of the consultancies as supportive to those of their clients. The consultancies' capabilities are regarded as areas of expertise that primarily deliver value as they are embedded within client organizations, directly alongside and in concert with their specific internal functions.

While the consultancies' websites describe how their methods are naturally supportive of their clients, a couple of them elaborated and explained that this is encouraged through an intentional process of facilitation. Veryday's website indicates that clients should "Prepare to be challenged, and surprised." They and Doberman present clear intentions to employ participatory design methods, including visual service, customer journey, and opportunity mapping as well as role-playing and prototyping. Veryday's website clearly states that such direct involvement is intended to bolster the "business relevance" of their design concepts, and that this direct partnership can save time and money by enabling early and iterative testing.

4.3.2. Complexity and Ambiguity

Through their websites, the studied consultancies highlight their comfort with complex and ambiguous projects and problems. Adaptive Path's website confidently declares: "We are drawn to complex, ambiguous challenges that defy known approaches and best practices. If it's easy, it's not for us."

The websites provide examples of problems that they can and have addressed with past clients, illustrating their individual complexity, as well as the diversity among them. They illustrate how complexity and ambiguity are to be expected in service design projects, based on

services characteristic composition of multiple touchpoints. On this theme, Bridgeable’s website demonstrates the common thread of connecting this proclivity for complexity with the experience orientation of user-centered design: “At Bridgeable, we believe that impact comes through embracing the complexity and richness of the human experience.”

4.3.2.1. Multi-Touchpoint / Multi-Channel

Adaptive Path’s website provides the following description of their service design work: “Choreograph great moments: From a deep understanding of how customers interact across touchpoints, we envision ways to coordinate experiences across channels to deliver the goods every time.”

Doberman’s website explains their commitment to designing specific design elements as well as coordinating how they relate to one another in what they refer to as the “eco-system” - how they contribute in a synchronized manner to the overall customer journey. Transformator Design’s website refers to the interface between client organizations and their customers, regardless of the form of individual touchpoints. The websites provide explanations that such an orientation helps to synthesize the unavoidable complexity of services into customer-focused experiences. The complexity is not avoided. Instead, it is framed as a reflection of the complexity inherent to customer experience and emotion, which the consultancies use as a lens through which to address the complexity of the client organization and their service touchpoints.

4.3.2.2. Multidisciplinary

The websites refer to the consultancies’ belief in handling complexity with a multidisciplinary set of skills. Many of them illustrate this point by extensively listing their

design capabilities, which may include design disciplines and methods alike. Design disciplines listed among the websites include brand, graphic, experience, industrial, interface, and packaging design, as well as their many synonyms and variations. Designit’s website includes mention of their “270+ designers, business strategists, researchers, communicators, anthropologists & more,” thus implying a high degree of multi-disciplinary talent, and Veryday makes count of their “10 design disciplines” on their main “About Us” page. These disciplines are said to be integrated rather than operating and offered in isolation, indicating a focus on interdisciplinary capabilities. When attempting to summarize their focus in a prominent, brief statement, the websites do not provide a specific discipline of expertise, as showing in Table 11.

Consultancy	Summary
Adaptive Path	Adaptive Path is an experience design firm with studios in San Francisco and Austin. We help companies create products and services that deliver great experiences for their customers.
Bridgeable Solutions	Bridgeable is a boutique research and design firm focused on helping clients bridge the gap between what we know about a complex problem and how we can solve it.
Designit	We're an international strategic design consultancy.
Doberman	Doberman is a design agency.
Transformator Design	Transformator Design are consultants in the area of Service Design and Innovation, Customer driven Service Strategies and Customer driven improvements in Service Delivery and Organisational Change.
Veryday	We are one of the world’s top-ranking design and innovation consultancies.

TABLE 11 - Consultancy Website Summaries

The websites commonly include employee profiles, ranging from simple head-shots and titles to full bios that resemble professional CVs.

4.3.3. Consulting

4.3.3.1. Fresh Perspective / Insight

The majority of the studies websites included mention of how their processes provide their clients with a new perspective, often defined by the user-centricity typical to a design approach. This definition is expanded with claims of visionary, large-impact aspirations - driven by their creativity and balanced with a rigorous and rational business sensibility and a proclivity to action.

The Veryday website uses the phrase “Balancing innovation and efficiency,” while Adaptive Path’s website explains: “Our approaches use both sides of the brain—marrying creative exploration with analytic rigor.”

There is extensive reference to the consultancies’ ability to innovate. In fact, the word group based on *innovation* and its stemmed words is the third most frequently used word group throughout the studied websites, after only those of *designs* and *service*. The Adaptive Path website avoided this terminology, but also projected this message through alternative phrases such as “big ideas,” “break new ground,” “forge new visions,” “Designing for the future,” and “experiences that will matter tomorrow.” Other phrases, such as Doberman’s “The design of culture,” also referred to impact at a large scale.

4.3.3.2. Capabilities Across Design Disciplines

Language regarding innovative methods, insights, and design outcomes are common in the websites' discussion of user-centricity. Innovation is closely tied to the diversity of the consultancies' team compositions, and the wide range of methods they employ, both seemingly driven by their dedication to user-centricity. Bridgeable's website makes clear the link between disciplinary diversity and placing value on lived human experience: "Anchored in a multi-disciplinary approach, we collaborate with clients to understand and translate the intricacies of the human experience - so we can design actions that improve people's lives."

The websites represent the consultancies as experts in this mindset, which they are quick to point out is different than that of their clients. This expertise is embodied in their methods, which define the consultancies' interaction or intervention with their clients. Doberman's website declares that "Simply put, our methods characterize how we live, breathe and think." In this way, the consultancies assert themselves as somewhat foreign to their clients, separate from their status quo, and capable of influence that is only capable through action by an organizationally external partner - a consultancy. The Designit website provides a clear example of this message:

"Business as usual is the end of progression. It's the end of the road. To evolve, to challenge and to improve, we must think unusually. That's how we move forward and develop new ideas.

The way forward is always the unusual. It's what our clients need and why they are here."

Again, the websites characterize this differentiation as embodied by their flexible, evolving methods. Veryday's website states that they have "...been developing our innovation methods continuously since 1969" while Designit's website makes a similar claim: "For more than 10 years we've refined our process so we hit target. First time. Every time." Their role as

consultants, and the diverse experience that role entails, is said to be responsible for their ability to constantly adapt. The Adaptive Path website explains that “Through our consulting services, we're constantly on the hunt for opportunities to define new methods.”

4.3.3.3. Action- / Impact-Oriented

All of the creativity, vision, and unfamiliar methodology presented by these websites is balanced by a message that these consultancies are committed to driving projects to implementation, where real-world impact will be realized. Adaptive Path’s website takes a direct approach in delivering this message: “Actionable Insights. Ideas you can execute. Sure, we like big ideas. But we also think big ideas don't matter unless they turn into big results. That's why we develop concepts with an eye toward making them real.”

Designit’s website expounds on the advantages of integrating design and implementation:

“We take care of the whole implementation phase to ensure your new strategy has optimum impact, and the process remains smooth and effective. Using the same team means that nothing is lost along the way, and ideas you brought in at the beginning aren’t pushed aside later in the process.”

This message is also present in the websites’ descriptions of design methods. Designit’s website states that “by immersing ourselves in real-life scenarios, we find and test real-life solutions.” With such language, the studied websites seek to communicate that design methods and user research are characterized by their ability to effectively uncover real-world, actionable insights. They refer to the creation of real, meaningful value for users, which provides the experience-orientation around which their diverse capabilities are integrated. In this way, they directly tie their design capabilities to resulting in real-world impact. This is especially evident on Bridgeable’s website, which repeatedly refers to value as being that which benefits the user:

“Bridgeable helps our clients innovate by bridging powerful insights with experiences designed to create value. We provide breakthrough understanding of people’s lived experience and then translate that understanding into strategies and designs that make a measurable (sic) impact”

Such a direct reference to measurable impact is rare. More commonly, the websites illustrate the reality of their impact by emphasizing the experiences provided by their projects, which help organizations connect more directly with their users. An experience-oriented project is said to reach users at a deep level, providing value for the organization by enabling them to make a meaningful impact in the lives of their users. This is the common goal to which all of their multi-disciplinary talent and methods are oriented. This is where they claim their impact to lie, and it is the proposed end that is used to justify their diverse means. Doberman’s website states this clearly: “The foundation for our work is a very simple idea. The more true value for the user – the more true value for the business.”

The websites consistently present a positive track-record of successful projects, reinforcing the message of their ability to bring a project to completion and deliver real value for their clients. They commonly dedicate a significant portion of their space to case studies of previous projects and lists of previous clients, while references to their company history and their trajectory of growth are scattered throughout. Adaptive Path’s website reads “For over ten years, we’ve been working at the frontier of UX [User Experience] design” going on to say that “when their usual design shop gets stuck, they call us,” emphasizing their industry leadership. The Designit website highlights their distributed network of international offices: “We’re an international strategic design consultancy. Scandinavian roots, European mindset, global reach.”

Other tactics include the listing of awards and years of operation - either to demonstrate extensive experience or how quickly they have risen.

4.3.4. Strategic Capabilities

As previously discussed, a major theme in the consultancies' websites is that of innovation. This term is used frequently but, as a theme, it falls under the broad umbrella of generally strategic capabilities. This theme is not represented by a single word, and is instead comprised of a variety of objectives that communicate an over-arching mission that extends beyond the scope of individual project deliverables. Aside from innovation, these objectives include a focus on the future, the alignment clients with their users, and the driving of internal project support as well as organizational transformation.

The use of terminology such as "Service Strategies," "Experience Strategy," and "Design Strategy" is occasionally used to indicate the development of strategy as a discrete output of the design process in a manner that is slightly more direct than the phrasing of "strategic" design, methods, and solutions, which is utilized less frequently.

Part of this strategic orientation is related to a focus on the future, in terms of user needs as well as the long-term effects of projects. Veryday's website states that "the future is out there, in the hands of the users," and describes "Futuring" as a process that "distills the trends that will influence your future business, and helps identify the opportunities brands have to turn change into commercial success." These statements illustrate how user-centered design informs the consultancies' strategic capabilities. The websites offer strategy development based on these principles. Transformator Design's website provides the following examples of the types of challenges that their strategy development can help their clients address:

- “What should we focus on?”
- “How do we increase customer satisfaction / loyalty?”
- “How our company can make a difference in the future?”
- “Small steps or large step or both (timing)?”

A related strategic imperative is the alignment of client organizations with their users, to encourage user-centricity as the continuing basis for future strategy development. This is said to require organizational change, based on the assumption that this paradigm is not the organizational status quo. Beyond the design of user-centered services, the consultancies indicate their ability to “help service organizations to become customer driven,” as put on Transformator Design’s website. These objectives are related to those of client empowerment and client education, which were mentioned above as modes of client collaboration. Here, their use on the websites is observed as means of illustrating the consultancies’ strategic capabilities.

“Transformation” is a term used by a few of the studied websites to describe such a realignment of their client organizations. Under the heading of “Business Innovation - Transforming Your Business” Veryday’s website states:

“It’s also our job to make our clients great innovators. We use our innovation methods to help them improve their own operational structures and processes. By establishing a collaborative, multi-disciplinary working environment they can increase productivity and foster innovation across the organization. Simply put, we make organizations smarter by bringing them closer to new opportunities and customer insights in their daily work.”

Depending on the consultancy, and sometimes within the a single website, this transformation is presented as either a goal integrated with a service design project or as a separate endeavour, and in some instances this division is uncertain. Doberman’s website utilizes the term transformation to describe the challenges of sufficiently engaging the individuals of the client organization in order to have them contribute to the delivery of the designed service. With

a slightly different take, yet still regarding the engagement toward a particular service project, Veryday's website refers to a "ripple effect" that is created within client organizations as they engage in multi-disciplinary collaboration with the design consultants. On the other hand, Transformator Design's website lists purely organizational challenges that they can help their clients face, removed from the context of a service design project, including the following (in increasing order of magnitude):

"How do we get into the customer's perspective of what we do?"

"How do we become a customer-driven company?"

"We have [a] silo-oriented focus, we need to become more cross-functional - how do we do it?"

"How are employee satisfaction and customer satisfaction [related]?"

4.4. Summary

Through the methods of in-depth interviews, surveys, and content analysis, recurring themes regarding both service design consulting and participatory design methods included emergence, complexity, and alignment. The survey respondents indicated a perception that their clients expect less strategically-oriented design outcomes than those deemed necessary by the consultants. Consultants suggested they involve clients in a variety of participatory methods, through which an alignment between the objectives and capabilities of the two parties can be facilitated. The consultants perceive themselves as experts who, in their participatory engagement with clients, facilitate collaborative design processes that holistically consider and aligns service systems' various touchpoints and stakeholders.

CHAPTER FIVE

DISCUSSION

As the service sector continues to grow within the world economy, designers are responding through the development of methods and approaches suited to the consideration of services as design projects, contributing to the emergence of service design as a discipline. Principles of co-creation are present in service delivery, as well as in the process of their design. In particular, participatory design methods have been regarded as popular within service design practice, contributing significantly to its formation. However, the extent to which participatory methods are regarded and leveraged as strategic tools of client engagement is unclear.

In response, this study investigated the participatory design methods of service design consultancies, and the intentions, implications, and opportunities behind these methods as they pertain to organizational integration and client engagement. Specifically, the study addressed the following research questions:

- Q. How are approaches to participatory design methods among service design consultancies contributing to the emergent definition of service design?
- SQ1. To what extent do service design consultancies leverage participatory design methods for objectives of organizational integration and client engagement?
- SQ2. To what extent is there a conflict between the authority of design expertise and the democratizing and empowering ideals of participatory design?

Research was conducted through the methods of in-depth interviews, content analysis, and surveys, which were analyzed for emergent themes. This chapter considers how the themes

identified in the study relate and contribute to the extant literature. The main, driving question (Q) is addressed through sections within this chapter, including those that address the two subquestions (SQ1, SQ2). The limitations of the study are also discussed, followed by recommendations for future research that may follow from this study.

5.1. The emergent definition of service design practice and the contribution of consultants' approaches to participatory design methods

The participating consultants, in each of the research methods of this study, were found to reflect the literature (Han, 2009; Kimbell, 2009; Moritz, 2005) in regards to the emergent state of service design. Participants revealed the varying degrees of service design understanding among their clients. They seek to gradually introduce a user-centered, service design perspective with clients over the course of individual projects, as well as over the course of multi-project relationships with returning clients. Service design capabilities are grounded in, related to, and said to be evolving from various design disciplines. Therefore, through the intentional vocabulary and modes of practice, service design consultancies are continuously contributing to the emergence of service design as a discipline. In this way, they are engaged with the development of the discipline as a whole - not only in the formalization of methods and vocabulary, but also in the critically important formation of the wider context thereof - a community of practitioners and, more importantly, direct involvement in service design activity.

5.1.1. Participatory methods bridge design activity and business objectives

In this construction and definition of service design, consultants play a role that is distinct from that of academia. Their interest in the positive and rapid recognition of service design is

directly linked to their economic viability. This relationship plays a part in motivating the participatory means of engagement discussed throughout this study, which are more direct and immediately relevant to clients than academia's means of communicating service design theory. Consultants allow others to experience their methods first hand, through constructive projects, as they seek to directly demonstrate the value of service design. Design methods are involved in almost all modes of design consultants' interaction with clients. Who they are, and how they exist within industry, is largely determined by the ways in which service design consultants communicate and act through their methods in order to develop shared meaning. Thus, there is ample motivation for them to be actively engaged in reflecting upon the implications of these methods.

Beyond the conceptual and rhetorical emergence of service design, service design consultancies are aiming to directly influence design-led services and strategies of their client organizations by way of service design practice. As the findings of this study show, service design consultancies may not always be successful in this aim, but even so, this appears to remain an ultimate goal. This may seem counterintuitive, as the fulfillment of this goal might be assumed to leave service design consultancies with no business. However, the pursuit of this ideal will situate service design consultants as experts in the intervening period, while the complete adoption of service design principles across all organizations within all service industries has not been achieved. The seemingly unattainable paradigmatic shift toward service-design-driven organizations as a norm perhaps ensures a constant supply of clients that are dissatisfied with their ability to optimize their organizations according to the prevailing principles of business. The consultants demonstrate a professional perspectives that is attuned to

such market realities, and to the value of a niche that may never be fully realized in its idealistic theoretical form. The ability for consultants to grapple with such realities of business through facilitative design methods may be an implicit demonstration of their business astuteness that is more fundamental and powerful than the evidence that they offer directly, or that is represented in the literature.

5.1.2. Leveraging participatory design methods for objectives of organizational integration and client engagement

In order to explore the driving question of how service designers' approaches to participatory methods contribute to the definition of service design consulting, this question was broken into two subquestions. This section explores the first of these subquestions: To what extent do service design consultancies leverage participatory design methods for objectives of organizational integration and client engagement? This question is approached first through discussion of engagements, roles, and relationships in service design consulting, and how the consultants situate themselves in this context. Second, this section discusses the service design consultants' mission of leveraging complexity by embracing it across various levels of their work , including their fundamentally strategic capabilities and multi-purpose methods.

5.1.2.1. Engagements, Roles, and Relationships in Consulting

The purported advantages of a consultancy model are closely related to the ideas above regarding business survival. This was partially recognized at the outset of the study, which focused specifically on service design consultancies rather than internal design departments. This focus was driven by literature that referred to the important developments in service design

practice that have been made by consultancies. Furthermore, research on the reframing of designers as facilitators was found to have commonalities with the research on the relationships between consultants and their clients. The study found service design consultancies to be highly reflective about how their position as consultants, external to their client organizations, is suited to the practice of service design. This was found to be especially the case in regards to the consultancies' contribution to the emergence of service design, as described above.

Client organizations were said to be expecting a certain degree of disruption to their status quo with the introduction of a consultancy, which affords the consultants a degree of trust and flexibility, and enables their introduction of unfamiliar perspectives. Even as clients may not fully understand what service design is, or exactly what these consultancies can offer, they are said to be curious and open based on their limited success with previous approaches. This curiosity does not equate to complete pliability to the approach of the service design consultants, but it does seem to be a key component in their approach to asserting a measure of authority in this relationship.

The consultants regularly regarded themselves as experts who are constantly on the leading edge of the evolving methods and practice of service design and who, therefore, must have sufficient freedom to experiment. Such methods expertise is said to require a great degree of multidisciplinary in their teams, enabling the consultancies to appropriate methods from other disciplines, leverage these methods for multiple simultaneous objectives, and effectively justify their use to clients. This need to constantly prove their value in order to justify their clients' patronage likely contributes the consultancies' communicated emphasis on their proclivity to action, implementation, and tangible output, as well the actual pursuit of these

goals. The consultants possess knowledge that is unknown to client organizations, and they must be trusted in the appropriate application of these methods with their clients. Service design consultants recognize this process as precarious. They are careful to diplomatically communicate support regarding clients' need to change, and to relate their approach to frameworks and vocabulary of business that may be more familiar to their clients, rather than employing scorn and design dogma. Erik Widmark of Transformator Design addressed this directly, stating that his approach to user advocacy has become "less extremist" (personal communications, January 28, 2013).

Their external position as consultants also requires them to be reflective about how they manage their communications with clients. Their messages must be clear and intentional, and every representation of themselves is somewhat considered as a form of communication. This is the perspective taken at the outset of this study, based on the literature regarding reflective and emergent service design practice, and it is one that appears to be shared by the service design consultants that participated in this study. They manage the message of their value to clients through explicit means, such as their websites, which allude to their strategic value and the action-orientation mentioned above. The direct engagement of clients and the demonstration of their methods seems to be recognized as their primary means of communicating their value.

5.1.2.2. Thoroughly Addressing Complexity

The service design consultancies' representation of their capabilities, methods, and the practice of service design in general, placed a great degree of importance on the notion of complexity. They represented their capabilities as having far-ranging and fundamental strategic value, their methods as multi-purpose and integrative, and service design to be a means of

acknowledging and addressing these multiple levels of complexity in a coordinated manner. The broad and complex implications of service design projects, beginning with the defining multi-touchpoint composition of services, is said to be addressed through similarly diverse and flexible methods. The consultancies claim that, through experience with such methods, they have become familiar with such complexity, and the ambiguous nature of the problems that their clients might face. This complexity is reflected on multiple scales, spiraling outward from project specifics toward the organizational implications of service design projects.

Such complexity is thoroughly addressed by the service design consultants through a user-centered approach and, notably, client-oriented methods. As presented in the literature review, user experience is a lens through which to assess all touchpoints of any given service; it is conducive to developing empathy with every human element of a service system, and can be applied to other stakeholders as users of some aspect of the system. This framework in the literature is largely reflected in the perspectives of the participating consultancies. However, the connection of such concepts to the role of client-oriented methods is much more prominent in the perspectives of the study participants than it is in the literature. Clients were revealed to be the main participants in design methods, rather than the typically considered customer / user. Users are involved as well, most prominently in preliminary front-end user research. Even then, user participation is often used to facilitate the development of user empathy among client stakeholders through either their simultaneous involvement or the creative communication of user-driven findings. Clients are involved in a greater variety of participatory design methods, which are utilized more consistently throughout the service design consulting project.

A focus on client-oriented methods is likely driven by the service design perspective, in which users and the organization co-create value. In this system, users represent a single stakeholder group who engage - via interaction with touchpoints - with an organization that is itself a network of stakeholders. Therefore, service design consultancies recognize the involvement of the organization as a means of addressing an array of stakeholders, which include diverse departments, hierarchical authorities, and capabilities of the service organization. Many aspects of service complexity can be addressed through consideration of stakeholders within the organization; they have a hand in the front-end user touchpoints as well as the internal structure of the service system and the back-end interaction with external stakeholders such as suppliers and partner organizations. User-centered principles inform the client-oriented methods, and ultimately, the service design consultancies strive to develop services as organizational systems that are aligned to support user experience. However, in service design consulting, it is the clients, not the users, who are primarily engaged through participatory design methods as an effective means of addressing the complexity of service systems.

5.1.3. Conflict between the authority of design expertise and the democratizing and empowering ideals of participatory design

The driving question of how approaches to participatory methods contribute to the definition of service design consulting was most directly addressed through the theme of designers as facilitators. This provides an interesting opportunity to discuss subquestion two: to what extent is there a conflict between the authority of design expertise and the democratizing and empowering ideals of participatory design? Within this section, this question is approached through discussion of, first, the consultants' coordinated pursuit of client education, research, and

empowerment, second, the tension between expertise and inclusivity and, lastly, the tension that arises as they seek to simultaneously address objectives of the project, partnership, and organizational strategy.

5.1.3.1. Integration of Client Education, Research, & Empowerment

The service design consultancies of this study were found to leverage participatory design methods for objectives of client engagement in ways that closely resemble the ideas put forth within the examined literature, including the objectives of participant empowerment (Holmlid, 2009). In addition to client empowerment, client research and education were presented as related and coordinated objectives of participatory methods. Through the integration of these objectives, facilitation (Dust & Jonsdatter, 2008; Sanders & Stappers, 2008) was found to be a central theme throughout the findings, and revealed to be closely related to the themes of experiential and compelling involvement that are prominent in the literature (Schön, 1983; Schrage, 1999). Such various modes of facilitation through participatory design methods were found to be explicitly regarded as means of client engagement. Consultants expressed that participatory methods are valued for their flexible and responsive capacity rather than their provision of a specific procedure. The engagement of clients through participatory methods was said to facilitate a depth of involvement and understanding of the client that enables the consultants to integrate the diverse objectives of design research and client education and empowerment, with a great degree of variability within each of these categories.

The examined service design consultancies can be said to have a discursive relationship with the literature. They seem to be aware of certain conceptual frameworks within the literature that regard service design practice, and to leverage these frameworks in order to

understand and communicate their value. Through participation in practice-oriented studies (Blomkvist & Holmlid, 2010; Moritz, 2005), such as this, and through the authoring of literature (Coughlan, Suri, & Canales, 2007; Polaine, Løvlie & Reason, 2013; Stickdorn & Schneider, 2010), design consultants also directly influence its development. There is an obvious imperative to take advantage of these channels as a means of communicating the value of service design consultancies, their approaches and methods, and a general design perspective. Similarly, the consultancies' websites are approached as tools for situating themselves within the wider community - as any official external representation of organizations - . Their methods are similarly directed toward the dissemination of their value proposition, which is essential to their recognition and survival within the inescapable context of industry. This could be said of all organizations - their survival is their necessary underlying motivation - and the recognition of such within this context does not undermine the validity of the service design consultancies' idealistic messages of client collaboration and partnership. However, the recognition and acknowledgement of this tension is valuable nonetheless, precisely because it is such a common organizational aim and, yet, not apparent in the extant service design literature.

5.1.3.2. Tension: Expertise and Inclusivity

The tension between expertise and inclusion is evident in various aspects of the study. The service design consultants studied seem to be negotiating a balance between objectives of client education and client empowerment. The notion of educating the client could be said to reflect the consultants' perception of their own expertise in a few different ways.

Firstly, the interviews and surveys showed that the consultants perceive that there is often a discrepancy between the consultants' and the clients' assessment of the clients' needs. Part of

the education of the client entails persuading them that they require deeper intervention from, and partnership with, the service design consultancies. An extended engagement and closer partnership may very well be aligned with the principles of a service design approach. However, considering the clients' perspective, one can imagine the conflict of interest that may be perceived, and the skepticism that may result.

Secondly, the consultants must face the pressure of communicating, asserting, and reinforcing the value that they bring to their clients in order to sustain their business by attracting and maintaining client partnerships. Their use of design terminology is said to be carefully and strategically employed in order to set clients' expectations for unfamiliar methods and approaches, as well as frameworks for understanding the consultants' expertise. Such tactics are employed in order for the service design consultancies to communicate what they can offer to their clients and, as a consequence, point to capabilities or perspectives that their clients lack. The establishment of this imbalance may be necessary in order to attract clientele that understands and seeks service design expertise. However, there is a notable tension when juxtaposed with the reported objectives of client empowerment, especially considering that education is apparently an early priority - in order to attract the initial attention and encourage the recognition of need from prospective clients.

In these early stages of education, the expertise must be recognized by clients as novel, yet reliable. The participatory design literature refers to the demystification and accessibility of design methods as effective paths to their adoption. However, these consultancies leverage the mystery that surrounds the approaches that constitute their practice. The service design consultancies take advantage of their clients' perception of them as different and creative in order

to set expectations for their unique perspectives and methods. They maintain an identity that is distinct from the culture of their client organizations in order to encourage change through the combination, rather than compromise, of the capabilities of the consultancy and their clients. This approach to interdisciplinary design collaboration is aligned with the literature on participatory design, but perhaps not with that of organizational design engagement.

Lastly, the education of clients in the value of a design-led approach is a mission that is complicated by the evolving and, at times, incompatible ideas around service design practice among expert practitioners and researchers themselves. In an odd way, exposure to this uncertainty may be a suitable introduction for clients into the emergent nature of design work - where the problem and the solution are simultaneously defined through action - but it may also serve to confuse clients. Attempting to educate clients in the value of a design-led approach may invite criticism and skepticism if ad-hoc, flexible, participatory methods are interpreted by clients as messy, unprincipled, and unprofessional. The service design consultants are cognizant of the need to educate clients at a level that is appropriate to their immediate situation, and consider this ability an expertise in itself.

In these ways, the mission of client education shapes and reveals the consultants' perception of their own expertise, rather than exclusively the clients' perception of same.

5.1.3.3. Tension: Project, Partnership, and Organizational Strategy

The organizational implications of service design projects and methods were discussed throughout the study by the research participants. A service may significantly influence an organization's internal structure, its interaction with external stakeholder such as organizations and customers, as well as the relationship between the two. In addition to the implications of

service design projects, service design methods were also indicated to address such factors - through direct client engagement in participatory design methods. They harness these methods to facilitate user empathy, a sense of inclusion and ownership, and path to implementation for their client organizations.

Despite the recognition of the organizational and strategic implications of their work, organizational transformation was rarely regarded by the service design consultants as an explicit objective, let alone as a primary objective. Instead of referring to organizational transformation when describing the strategic implications of their work, service design consultants were more inclined to refer to the development of a synergetic partnership between themselves and their clients. As described in the above paragraph, a service, and the design thereof, is regarded as naturally addressing organizational strategy. Furthermore, study participants placed a high importance on the alignment between consultant and client capabilities, between clients and their users, and between clients' internal actors - which are all somewhat addressed through facilitation of participatory design methods. This illustrates the extent to which the service project is considered as a system, which is prioritized over the organization in isolation. The consultancies do not strive to develop the capabilities of clients so much as align them with other stakeholders - including the consultancies themselves.

This could be interpreted as the service design consultancies building-in a degree of reliance and a corresponding ongoing role for themselves within their client organizations. While this may be an element of this approach, as discussed previously in this section, this tactic also reflects the literature on designers as facilitators, the nature of interdisciplinary design activity, and the participatory design objectives of empowerment. The service design consulting

engagement could be said to be considered as part of the overall service system rather than a precursor to the service. Through this lens, the alignment between consultant and client is seen to be just another inter-stakeholder alignment, such as those with internal actors, users, and other partner organizations of the client. Alignment is encouraged through participatory methods, through which service design consultants facilitate the clients' interaction with these other stakeholders, including the service design consultancy.

5.2. Limitations

Certain limitations of this study arose out of the relationship between the academically situated researcher and the professional subject of research. Recruitment of research participants was initiated almost exclusively through cold-calling via email addresses that were gathered through internet searches. The researcher had no pre-existing relationship with any of the research participants, and limited access to others who could offer access or introduction to the service design consultancies of interest. Therefore, those firms who responded to the initial letter of invitation could be said to be self-selected, to a certain extent. Convenience sampling is not uncommon, but wider participation through a broader sample of service design consultancies could have led to more diverse perspectives represented in the study. The consultancies that responded to interview invitations were usually the ones who included the individual email addresses of their consultants on their websites - indicating a willingness to engage the public - which may have introduced a slight bias into the results.

On a somewhat related note, the muddled definition of service design consulting, and the scarcity of service design consultants, required that the researcher reach out to consultancies that used service design terminology in ways that did not necessarily agree with the working

definition of service design that was utilized in the study, or that favored other vocabulary over that of “service”. Although there may have been discrepancies in terminology, participating consultancies were screened based on their project work. This introduced limitations to the research as well as valuable insight into the place of service design relative to various design disciplines and functions. However, if one were to have adequate access to afford being so selective, participants could be recruited according to more strict criteria in order to investigate a more rigidly defined category of service design consultants.

The low number of interview participants (and websites reviewed) was purposefully chosen to generate a manageable set of data for deep content analysis, based on the timeline and resources of the study. The results from this study were intended to examine service design consultancies as a community of practice (including the internal disagreement and variability) rather than to investigate and compare individual consultancies. However, the study may have been limited in taking this perspective. There are likely many insights and patterns that could be revealed by contrasting the perspectives between service design consultancies, in order to investigate methods and ideas that are commonly grouped or opposed. This study does not achieve this type of analysis.

Finally, again based on the time and resources available to this study, the results were not developed and tested as guidelines, toolkits, or validated through other such interventional methods. Therefore, the findings of this study are speculative rather than prescriptive. Nevertheless, this study provides valuable groundwork for future studies in the area of service design consulting, particularly demonstrating the advantage and suitability of a practice-based perspective and methodology in this area of research.

5.3. Recommendations for Future Research

As previously suggested, future studies could undertake a cross-consultancy analysis in order to unpack the nuances within the practice of service design consulting more specifically, based on the patterns identified and discussed in this study. This could be achieved by investigating a greater number of participants from each consultancy or a wider sample of their publicly available literature, including white-papers and blog posts.

This study involves insights that were derived from the first-hand perspective of service design consultants and the websites of their consultancies; this practice orientation was a defining characteristic of the study. The findings could be utilized in future studies as a new starting point for additional practice-oriented, interview-based research with a similar sample of service design consultants. Such research could serve two purposes; first, to validate the findings, in a subjective sense, within the same professional group from which they were derived and, second, to incite further investigation of the same questions through different, supposedly deeper prompts. Looping findings back to a professional context would be a useful measure in maintaining the practice relevance of this study.

This study has approached the definition of service design through the lenses of consultancy and participatory design methods, which was prompted by the themes currently evident in relevant literature. Future research could contribute to the definition of service design as it continues to emerge in practice and research, through alternative lenses that will inevitably become evident, including those presented in the findings of this study. For example, future studies could examine the organizational structure of service design consultancies in order to further investigate the roles within, and their adherence / contribution to

service design principles. Alternatively, a historical perspective could be taken regarding individual service design consultancies as case studies that may reflect the emergence of service design - perhaps through the lens of their strategies of establishing such an organization and building a client base.

It could also be very interesting and useful for future research to investigate the areas of this study through the perspective of the clients of service design consultancies. By pairing such research with consultant-based studies such as this, researchers could develop a richer image of the client-consultant relationship that is so central to the emergence of service design consulting. The findings from such a study could also be extremely valuable to practitioners, allowing them to peer inside the mindset of their past and prospective clientele with a degree of honesty that may otherwise be outside their reach.

Lastly, future studies could seek to empirically test the themes and findings of this study, which lacked statistical power. Such research could help to establish a benchmark from which to track the evolution of service design consulting based on consistent metrics.

CHAPTER SIX

CONCLUSION

This study aimed to take an interdisciplinary perspective in the qualitative investigation of the intentions, implications, and opportunities perceived by service design consultants regarding the relevance of participatory design methods toward client engagement. The contemporary context of this study is the emergence of service design within the growing service sector. Designers are contributing to such emergence through evolving methods and frameworks that enable them to approach service organizations and the user experience of their customers as integrated systems. The ways that service design consultancies assert the value of their practice through engagement with client organizations reveals the extent to which principles of co-creation pervade from the delivery of services to aspects of service design consulting. This study examined how service design consultants' approaches to participatory methods as strategic tools of client engagement might help to define their emergent area of practice. To further the depth of investigation and emphasize the real-world environments of these methods - with all its interpersonal, interdisciplinary, and inter-organizational implications - the study also questioned the extent to which there is there a conflict between design expertise and business pragmatism, and the empowering ideals of participatory design.

The study led to a number of salient findings. The first is that client engagement, in various forms, is regarded by the investigated service design consultancies as the primary objective of their participatory design methods. The second is that these methods are believed to enable the integrated pursuit of client research, education, and empowerment, as well as the

consultancies' own viability. The third finding is that organizational transformation is rarely pursued as an objective separate from the holistic strategic implications of the service design consulting engagement, and the participatory design methods utilized in its course.

Participatory methods are more widely regarded as client-oriented than user-oriented. This perspective is unique from that represented in the literature. Clients were regarded as the main participants in design methods. When users are involved, it is usually in such a way as to facilitate alignment between user needs and the perspectives of stakeholders within the client organization. Clients are involved in a wide array of participatory design methods, as appropriate to the specific project and circumstance, and they are engaged via these methods throughout the service design consulting project. In the engagement of the client organization, the consultants seek to engage an array of service stakeholders. The leveraging of client organization engagement is considered to be more effective than the engagement of users as a means of thoroughly addressing service system complexities.

By facilitating the involvement of clients in participatory design methods, service design consultants pursue objectives of client research, client education, and client empowerment in an integrated fashion. Furthermore, such objectives are considered to be aligned with the fundamental underlying objective of consultancy survival, through the development of client partnerships. The consultancies recognize and play to a market niche that is suited to their intervention from an external position and to their design-oriented approach. Faced with this reality in their everyday practice, service design consultancies are enabled to acknowledge and leverage their place within the service economy in a way that is not readily recognized within the extant literature.

The strategic implications of service design consulting engagements are emphasized as factors that must be nurtured as the service itself, therefore transcending the scope of singular design projects. This is in contrast to the separate pursuit of exceptionally strategically-oriented organizational transformation projects, which are apparently much less frequent. This perspective emphasizes the need for ongoing client-consultant partnerships, which are said to commonly result from service design consulting engagements. Strategic benefits are said to arise from the client organizations' alignment with their users and stakeholders, which is what service design consultancies promise to facilitate through their engagement and utilization of participatory design methods.

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APPENDICES

APPENDIX A

Recruitment Email - Interview

Email Subject: Service Design Research

Dear <insert name>,

My name is John Di Palma, and I am conducting research regarding the methods of stakeholder engagement used by service design consultants, and their perspectives on participatory design. This study is being conducted as part of my Master of Design thesis at Carleton University in Ottawa, Canada.

Is there a possibility that <insert company name> might contribute to my study by volunteering an interview participant? In my research, <insert company name> has stood out through its <insert company qualities of eligibility and note>. <insert company name>'s perspective would be very much appreciated as a valuable contribution to this study.

I am hoping that members of <insert company name> will find interest in this research, and that we could arrange to meet via Skype, phone, or in-person in Toronto during Interaction13 Conference. Please feel free to forward this message to any team members that you feel might be interested, and to contact me by email or phone () at your convenience. I have included some additional details of the study below.

Thank you for your time and for considering this request; I look forward to hearing from you.

Best regards,

John Di Palma
johndipalma@cmail.carleton.ca

Research Study: Participatory Methods in Service Design Consulting

Your participation would be appreciated for a study that is being conducted by a Master of Design student from the School of Industrial Design at Carleton University. We are interested in how service design consultants perceive and utilize participatory design methods.

Those recruited for this study will be asked to participate in an interview. The sessions will be audio recorded, with an approximate duration of 30 – 90 minutes. Participation in this study is entirely voluntary; participants may withdraw at any time during the study without prejudice, and may omit answering any specific questions of their choosing.

Eligibility Requirements:

Participants are sought who are employed at service design consultancies. They should be directly involved with service design, in research, design, and/or client engagement capacities. Such duties and experiences are more important than titles, which may include service analyst, service / experience / interaction designer, design researcher, director of design, etc.

Study Duration:

The interview portion of the study will take place between approximately January 21, 2013 and February 15, 2013. Each interview will require approximately 30 - 90 minutes, and can be scheduled at the participants' convenience.

If you would like more information regarding this thesis, please email John Di Palma at johndipalma@cmail.carleton.ca or call .

APPENDIX B
Recruitment Email - Survey

Email Subject: Service Design Survey

Dear <insert name>,

My name is John Di Palma, and I am conducting research regarding the methods of stakeholder engagement used by service design consultants, and their perspectives on participatory design. This study is being conducted as part of my Master of Design thesis at Carleton University in Ottawa, Canada, under the supervision of Bjarki Hallgrímsson, School of Industrial Design, and Dr. Steven Murphy, Sprott School of Business

Your experience in design consulting would be of great benefit to my research and **I would like to invite you to take part in an online survey on the topic of service design consultantship.** The survey will take about 10 minutes to complete. For further details, please see the letter below, and the consent form linked to in the survey itself.

Please feel free to forward this message to any colleagues that you feel might be interested, and to contact me by email or phone () with any questions.

The survey may be reached through the following link: <http://fluidsurveys.com/surveys/di-palma/participatory-methods-in-service-design-consulting/>

Thank you for your time; I look forward to your participation and responses.

Best regards,

John Di Palma
MDes Candidate
Carleton University
johndipalma@cmail.carleton.ca

Research Study: Participatory Methods in Service Design Consulting

Your participation would be appreciated for a study that is being conducted by John Di Palma, a Master of Design student from the School of Industrial Design at Carleton University. We are interested in the methods of stakeholder engagement used by service design consultants, and how they perceive and utilize participatory design methods. Those recruited for this study will be asked to complete a brief survey, which should between 10-15 minutes. Participation in this study is entirely voluntary; participants may withdraw at any time during the study, and may omit answering any specific questions of their choosing.

Eligibility Requirements:

Participants are sought who are employed at service design consultancies. They should be directly involved with service design, in research, design, and/or client engagement capacities. Such duties and experiences are more important than titles, which may include service analyst, service / experience / interaction designer, design researcher, director of design, etc.

Study Duration:

The surveys will be distributed between Mach 19 and 23, 2013. The survey will require approximately 10 minutes to complete, and can be accessed and completed at the participants convenience.

If you would like more information regarding this thesis, please email John Di Palma at johndipalma@cmail.carleton.ca or call

APPENDIX C
Informed Consent Form - Interview



Canada's Capital University

Informed Consent Form

Dear <insert name>,

The purpose of an informed consent is to insure that you understand the purpose of the study and the nature of your involvement. The informed consent must provide sufficient information such that you have the opportunity to determine whether you wish to participate in the study.

TITLE OF RESEARCH PROJECT: Participatory design methods in service design consulting

ETHICS CLEARANCE FOR THE COLLECTION OF DATA EXPIRES: 31 May, 2013

RESEARCH PERSONNEL

This study is being conducted by **John Di Palma** as part of a Master's of Design thesis supervised by Prof. Bjarki Hallgrímsson, School of Industrial Design, Carleton University.

PURPOSE

This research aims to examine the perception and use of participatory design methods by service design consultants.

TASK REQUIREMENTS

You are asked to take part in an interview to clarify aspects of your professional experience, as a service design consultant, with design methods and client engagement. A single interview, approximately 30-90 minutes in duration, is required of each participant, which will be audio recorded and selectively transcribed. Findings of this study will be provided to participants, in the form of the final thesis, upon its completion. Participants may benefit from the research findings and recommendation and/or through exposure to the contributions of other experts within their field.

POTENTIAL OF RISK OR DISCOMFORT

There are no known risks, physical or emotional, to participation in this study. The materials used in this study deal with neutral, practice-oriented topics and make no use of emotional or upsetting language. Topics will include professional practice and methods, and may be of professional sensitivity, and participants will not be discriminated against in regard to the extent to which they choose to respond.

ANONYMITY / CONFIDENTIALITY

You may request for any portion of your response to be not attributed to you. In this case, these portions of the interview will be kept anonymous by being stored and reported separately from your attributed responses and any identifying information.

RIGHT TO WITHDRAW

Your participation in this study is entirely voluntary. You may withdraw from participation at any time during the study without prejudice and you may omit answering any specific interview question if you choose. You have the right to withdraw from the study at any point during, and up to a week after, your participation. If you indicate this is your choice, then all measures and data you have provided will be destroyed.

This project was reviewed and cleared by the Carleton University Research Ethics Board. If you have any concerns regarding how this study was conducted, you may contact the Research Ethics Board through the contact information listed below, John Di Palma at johndipalma@cmail.carleton.ca, or Bjarki Hallgrimsson at bjarki_hallgrimsson@carleton.ca.

I have read the above form and understand the conditions of my participation. I indicate below my consent for the use of this material for research purposes, conferences, academic journals, course research paper, web site/publication and Master's thesis. My signature indicates that I agree to participate in this study.

Professor Andy Alder, Chair
Professor Louise Heslop, Vice-Chair
Research Ethics Board
Carleton University Research Office
Carleton University
1125 Colonel By Drive
Ottawa, Ontario K1S 5B6
Tel: 613-520-2517
E-mail: ethics@carleton.ca

Participant's Name: _____ Participant's Signature: _____

Researcher's Name: _____ Researcher's Signature: _____

Date _____

APPENDIX D
Informed Consent Form - Survey



Canada's Capital University

Informed Consent Form

The purpose of an informed consent is to insure that you understand the purpose of the study and the nature of your involvement. The informed consent must provide sufficient information such that you have the opportunity to determine whether you wish to participate in the study.

TITLE OF RESEARCH PROJECT: Participatory design methods in service design consulting

Ethics Clearance for the Collection of Data Expires: 31 May, 2013

RESEARCH PERSONNEL

This study is being conducted by **John Di Palma** as part of a Master's of Design thesis supervised by Prof. Bjarki Hallgrimsson, School of Industrial Design, Carleton University.

PURPOSE

This research aims to examine the perception and use of participatory design methods by service design consultants.

TASK REQUIREMENTS

You are asked to take part in a survey to clarify aspects of your professional experience, as a service design consultant, with design methods and client engagement. A single survey, requiring approximately 10-15 minutes to complete, is asked of each participant. Findings of this study will be available to participants, in the form of the final thesis, by requesting a copy from the research personnel via email. Participants may benefit from the research findings and recommendation and/or through exposure to the contributions of other experts within their field.

POTENTIAL OF RISK OR DISCOMFORT

There are no known risks, physical or emotional, to participation in this study. The materials used in this study deal with neutral, practice-oriented topics and make no use of emotional or upsetting language. Topics will include professional practice and methods. Questions may be of professional sensitivity, and participants will not be discriminated against in regard to the extent to which they choose to response.

ANONYMITY / CONFIDENTIALITY

You may request for any portion of your response to be not attributed to you by contacting John Di Palma via email. In this case, these portions of the interview will be

kept anonymous by being stored and reported separately from your attributed responses and any identifying information.

Right to withdraw

Your participation in this study is entirely voluntary. You may withdraw from participation at any time during the study and you may omit answering any specific survey question, if you choose. You have the right to withdraw from the study at any point during, and up to a week after, your participation. If you wish indicate this is your choice, please contact the researcher via email. In this case, all measures and data you have provided will be destroyed.

This project was reviewed and cleared by the Carleton University Research Ethics Board. If you have any concerns regarding how this study was conducted, you may contact the Research Ethics Board through the contact information listed below, John Di Palma at [johndipalma@cmail.carleton.ca](mailto: johndipalma@cmail.carleton.ca), or Bjarki Hallgrimsson at [bjarki_hallgrimsson@carleton.ca](mailto: bjarki_hallgrimsson@carleton.ca).

Professor Andy Alder, Chair
Professor Louise Heslop, Vice-Chair
Research Ethics Board
Carleton University Research Office
Carleton University
1125 Colonel By Drive
Ottawa, Ontario K1S 5B6
Tel: 613-520-2517
E-mail: ethics@carleton.ca

I have read the above form and understand the conditions of my participation. By selecting 'Yes' I indicate that I agree to participate in this study, and consent to the use of this material for research purposes, conferences, academic journals, course research papers, web site/publication and Master's thesis.

APPENDIX E Online Survey

Clients approach your consultancy for...

ie. the self-declared scope of their problem / project

	Never	In a minority of projects	In about 50% of projects	In most projects	In all projects
design projects (Interaction / product / web / etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
service design	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
service assessment / redesign	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
methods instruction	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
development of internal capabilities / functions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
collaboration facilitation (with internal or external partners)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
organizational transformation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please feel free to elaborate, or to provide alternatives

//

From your perspective, the clients who approach you would benefit from...

ie. your interpretation of their needs

	Never	Occasionally	About half of the time	Usually	Always
design services (Interaction / product / web / etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
service design / redesign / evaluation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
methods instruction	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
development of internal capabilities / functions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
collaboration facilitation (with internal or external partners)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
organizational transformation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please feel free to elaborate, or to provide alternatives

//

Your projects involve the direct participation / engagement of users in...

	Never	In a minority of projects	In about 50% of projects	In most projects	In all projects
service design tools (customer journey mapping, stakeholder mapping, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
user research	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ideation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
workshops with other stakeholders	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
prototyping	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please feel free to elaborate, or to provide alternatives

4

Your projects involve the direct participation / engagement of clients in...

	Never	In a minority of projects	In about 50% of projects	In most projects	In all projects
service design tools (customer journey mapping, stakeholder mapping, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
user research	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
ideation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
workshops with other stakeholders	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
prototyping	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
project scoping	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please feel free to elaborate, or to provide alternatives

4

You provide your clients with...

	Never	In a minority of projects	In about 50% of projects	In most projects	In all projects
opportunities to observe your design methods (passive)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
facilitation of design methods	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
instruction in design methods	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please feel free to elaborate, or to provide alternatives

You engage clients through design methods for the purpose of...

	Never	Occasionally	About half the time	Usually	Always
research of the client (organizational capabilities, structure, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
communication / alignment between yourself and the client	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
alignment between disparate internal functions of the client	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
development of clients' internal capabilities / functions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
organizational transformation of the client	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please feel free to elaborate, or to provide alternatives

For clients, projects result in

	Never	Occasionally	About half the time	Usually	Always
long-term partnership with your agency	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
a discrete design outcome or specification (Interaction / product / web / etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
service development	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
strategy development	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
development of internal capabilities / functions	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
organizational transformation	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Please feel free to elaborate, or to provide alternatives

Professional Information

Please let us know a little about yourself and your background

Professional Title

Agency Name

Years of service design
experience

Years of design experience

Educational background

Other Professional
Background (If applicable)

EMAIL (optional) if you wish
to have the the final thesis
sent to you automatically
upon completion