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Service Design and Organizational Change: Bridging the Gap Between Rigour and Relevance

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Abstract: More and more design professionals enter the field of service design and conduct projects that have the potential to introduce changes to organizational systems. This working paper reflects on the potential of service design to generate and implement internal changes within an organization. The authors report on two pilot case studies from the educational sector. While the two pilot studies serve as further examples of how “reflection-in-action” can be rigorous in its own right [1], the purpose of this paper is to build a bridge between the theories and practices of organizational change and Service Design. The authors suggest that successful and sustainable new services, which aim for lasting transformations [2], require reflective inquiries into organizational systems. The authors frame these levels of service design inquiry and their potential impact introducing the terminology of ‘service interaction design’, ‘service design intervention’ and ‘organisational transformation’.

Key words: *Service Design, Organisational Change*

1. Background

While Service Design is emerging as a design practice of great interest to organizations, it is perceived as being most relevant as a practice and theory of designing desirable, usable and useful service interactions on the fringe of an organization. If we take the Shostack blueprint model [3], for example, we can find a transactional interpretation of service delivery and service encounters. The Shostack model hints at the fact that service interactions do not occur in a vacuum. However, it is not explicit about how deep a service can reach into the organizational system itself. This organizational system we are referring to concerns the core elements of the organization at hand: its people with their norms, values, beliefs and behavioural patterns; its structures, which includes procedures, hierarchies and tasks; its resources and an organization’s vision, which gives purpose and guidance for how resources might or might not be used. We argue that services cannot be isolated from these elements.

Recent advances in the theories and practices of service design have focused on the need for theoretical frameworks and methods to understand and approach services as complex social systems [4, 5, 6]. Service interactions and experiences occur within wider systems of action and actors whose behaviour can’t be predicted and designed in details, as complex social systems are ‘made up of interacting agents, whose

interactions create emergent properties, qualities, and patterns of behaviour” [7]. Service Designers move therefore from the aspicated role of ‘directors’ [8] of prescriptive service performances to the one of ‘enabler’, ‘facilitator’ and ‘connector’ for certain behaviours and configurations to emerge: “designers seemed to view the service as a fluid arrangement of human and non-human artefacts, rather than a fixed intangible entity” [9]. This is particularly true when designers aim to have a transformative effect on organisations and communities [10]; the emphasis here is on open, participatory and iterative design processes that build capacities from within and see users and service staff as co-producers and co-designers of the final solution [11, 12].

Also, current projects now underway by service design professionals in the UK begin to reach into the organization. Companies like Livework, Engine, Thinkpublic and Participle, for example, seek to transfer tools and methodologies; set up new research/innovation labs or end up with prototypes for radical new collaborative service models. These projects illustrate how service design practice is shifting its focus from “working for” a service organization towards “working with” or even “within” a service organization. This work by design professionals in the realm of service design is of great interest and relevance to the broader field of design.

Notwithstanding the growing acknowledgement in research and practice that services relate to complex systems and transformative interventions, few reflect on how these relate to organizational change or links to existing organizational theories. With this paper we would like to cover this gap by discussing some of the theories we have identified as relevant in this context, before we report on two pilot case studies conducted as design inquiries into organisations. We will begin with a discussion of organisational change.

2. Service Design and Organisational Change

Rousseau [13] suggests that there are three basic change strategies organizations can pursue. They can either *drift*, *accommodate* or engage in a *radical transformation*. Organizations that pursue a drifting strategy are like a boat that floats in a river. Accommodations, in turn, can be compared to fixing a flat tyre on a bicycle. The fix is local and does not impact the rest of the system (i.e., bike). In a radical transformation, one does not merely fix the flat tyre but questions the bicycle (i.e., mode of transportation) itself. Importantly, an organizational transformation involves a change in the fundamental assumptions, beliefs, norms, and values people hold [14].

Rousseau [13] describes fundamental assumptions as “the often unconscious beliefs that members share about their organization and its relationship to them.” They have a stabilizing effect on the organization and form the ‘core’ of an organization’s culture around which behavioral norms, values, behavior patterns and artifacts or products evolve. *Figure 1* shows Rousseau’s model for organizational culture, which illustrates how fundamental assumptions link both directly and indirectly to artefacts and how artefacts are part of an organization’s culture. We can see how artefacts both express and manifest existing assumptions, values, norms and beliefs. It also explains the ways in which many organizations tend to employ designers: as peripheral actors whose design activities are geared towards external customers and are kept away from questioning underlying assumptions, values, norms and beliefs. If we apply this situation to service designers, it is rather common for a service design project to start in an area ‘peripheral’ to an organization’s culture. In such a case, designers are

hired and used to express existing values and norms through new service offerings rather than to inquire into the organizational system and its culture, both of which have a strong influence on the ways services can be delivered and provided. As Ott et al. [15: p. 4] point out, “assumptions are more than beliefs or values: they are givens or truths that are held so strongly that they are no longer questioned nor even consciously thought about.” In order to instill or effect change it is therefore necessary to unearth the fundamental assumptions that drive an existing situation. The question is how can service designers do this and what do they need to succeed?

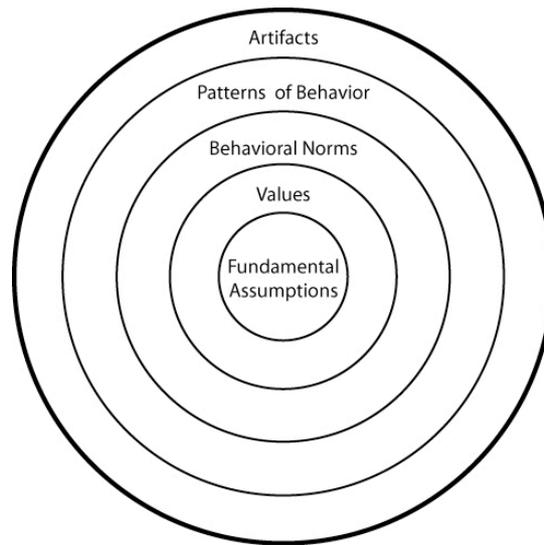


Figure 1: Layers of Culture and Normative Contract, Denise Rousseau 1995, p. 49

2.2 Service Design as an inquiry into the organisation

Buchanan [16] repositions the activity of designing as an inquiry in line with John Dewey’s [17] definition of an inquiry in general. Junginger [18] demonstrates how designers working with public service organizations (post offices, tax offices) can generate, implement and institutionalize changes within these organizations, when they follow a human-centred approach that involves people from within and from outside the organization. In such an instance, product development—here the development of services—can turn into an inquiry into the organization and a vehicle for organizational change [19]. The purpose of this paper is to show how Service Design, in particular, due to its embeddedness in the organizational system, has to pay attention to aspects of organizational change. We will now present two case studies that demonstrate our hypothesis and offer lessons for practicing service designers.

3. Case studies: redesigning education from within

We conducted two pilot projects in the educational sector. The education sector in UK is particularly relevant when talking about ‘transformative’ change, as it is currently the subject of a wide debate on what it should become in the 21st century. In 2004 Charles Clarke, a Minister for Education often regarded as being forward thinking, was quoted as saying “*in this changing world we know that education has to put the learner at the centre*” [20]. The first project was a research collaboration within a secondary school in East Lancashire (UK). The second project consisted of a set of projects developed by MA students (MA Design: Management and Policy) in collaboration with the library of Lancaster University.

3.1 CASE STUDY 1: Service Design for personalisation and participation of learning

This project explored the issues of personalisation of learning through the active involvement and participation of students in the co-design of their education. With students and staff from a large secondary school in East Lancashire, the Lancaster university research team explored new ways to utilise Personal Development (PD) time in school. Personal Development is a daily 20 minutes extra curricular time for students organized and delivered by PD tutors aiming at developing Social and Emotional Aspects of Learning (SEAL).

Working with one PD group over several months, the LU team facilitated various research activities conducted by the students. They were asked to explore two questions: 1) what is PD like today? And 2) what is meaningful for you in your daily life? The LU team developed two distinct activities to address each of these questions: 1) Interviewers and Observers: Students visited other PD classes to interview students, taking photos and writing notes out of their personal observations. 2) Myspace booklet: Each student received a scrapbook with questions that prompted them to talk about their lives using images, hand drawings, photos, stickers and text.

Students compared other PD with their personal experiences and expectations,—thereby articulating their values and overall beliefs about what a good teacher and good PD should be—while learning about themselves and each other. The students presented these materials in feedback sessions. Based on this material the LU team identified common themes (for example: creativity, engagement, passivity, games, idols, physical activity, social belonging and status) and developed some ideas for new PD activities, paying attention to SEAL objectives like self-awareness, managing feelings, motivation, empathy, and social skills. These ideas then informed the next session, where students began to describe how they would implement the new activities in their PD time.

The LU team shared these tangible outcomes with the wider school community, including the Deputy Head Teacher and a group of PD tutors. Alert to their possible fear for criticism, the LU team emphasized the participatory and collaborative nature of their work. As a result, the tutors dropped their defences and shared their experiences with PD time, deepening our organisational insights. The PD tutors appreciated the project but questioned how to maintain that engagement and motivation in students, when no external people were involved. The Deputy Head Teacher echoed this sentiment.

Through the insights we were able to gain in our work with the students and our conversations with the PD tutors, we began to understand how the school's problem of "raising expectations and generating more engagement and motivation," was related to their unquestioned understanding and definition of participation. In particular we found "participation" to be highly dependent on the reflective capacity of students, on the capacity to generate and exchange knowledge among project participants, on the concept of participation itself among staff and learners.

We found it especially challenging to engage students with activities which involving reflection on their own feelings and preferences towards their educational experience. Clearly a set of shared beliefs existed among the students about what their educational experience should be like, but this did not include reflection on the process itself. Students expected activities in a classroom to be highly structured, accompanied by tightly defined standards for achievement and assigned to them by an authority figure. On the other side, through a semi-structured process, the students themselves managed to discover, explore, and question the very service they are being offered. This opened new avenues for their PD tutor to learn about her students and for the students to learn from and about each other. Learning about students is recognised by staff as a mean to provide more personalised education, but ‘participation’ seemed to be still conceived as students being ‘active’ in the lecture, participating to given activities. Many of the ideas generated by the project were instead based on students-led activities based on their personal skills and interests. Allowing students to have such a role at school requires deep changes on how the school conceives the act of learning itself requiring a longer process of cultural and organisational transformation.

3.2 CASE STUDY 2: Service Design as an inquiry into the organisation – the library project

Four postgraduate students, as part of their MA assignments, explored their campus library from a service design perspective. Importantly, the students did not set out with any specific problem and were not given a design brief. Instead, they were encouraged to conduct an open-ended, yet systematic design inquiry into the library and how it provides services. They did so employing human-centred design thinking and design methods to identify potential issues that affected the service experiences. Also of importance, while the library made itself available to the students, it did not initiate this research.

Because the project was self-initiated and not requested by the library, the students began their research under serious restrictions: they were not allowed to speak to any library visitor or user within the library; could not take pictures or disrupt the library business in any noticeable way. In other words, the research was tolerated but not embraced by the organization at this stage.

As part of their coursework and project task, the students had to find a way to engage members from the library in their research. The students immediately established a relationship with the design subject librarian who also provided an extensive library induction and was fond of the project. It was made clear from the onset that the project sought to learn from the expertise and librarians’ insights and that the goal was not to criticize but to work together. As a result, the subject librarian provided the students with access to colleagues who volunteered to work with the students.

When the students invited the Design Librarian to their project room to review the findings they had already generated, she brought along one of her colleagues. Both experts reviewed, commented and questioned the students, while the students used the opportunity to engage with the librarians. The session generated additional insights and created more trust, as the librarians noticed that the students had already covered some ground that they themselves had not been able to get to yet; most noticeably the way international students used (or did not use) the library services.

The two librarians talked about the student's work and their insights with other colleagues. This facilitated the project's next phase, in which the students had to get in touch with a library expert to map the work of a librarian and the library "system." At this point, the students had engaged key people responsible for the library's computing system, the university estate planning, library online services and library marketing. The students grasp of the issues and the organizational system had evolved to a point that they could review the library's existing vision and mission and create a new vision to accommodate a broader and more diverse set of services by the library. Their new vision repositioned the library as an "Interactive Incubator." The new vision provided the framework for the adjustment of existing services and the development of new services. Each student then developed one idea in line with the new vision along with a common strategy for how to implement it. In the meantime, the Interim Library Head surprised the students by making himself accessible for project interviews. The final challenge for the students was to develop a common strategy to implement their new vision through products and services. Each student then developed one idea of their choosing into a concrete scenario.

The final project presentation took place in the library and was attended by staff members from the library as well as the interim head. Initially oblivious to the project, he publicly complemented the students and expressed his gratitude for the insights they had generated. He emphasized the value of their research into library users. Here their work departed from the library's current approach to group library users by status. Through their research, the students found a library user's intent and behaviours (i.e., browse books, look for a particular article), their location (off campus/on campus) more relevant. The library head closed his statement with the observation that of the many research projects that have been undertaken in the library over the years, this was the first project where the research team worked with the librarians and where the findings were fed back to the library.

4. Analysis of the two Case Studies and Key Findings

We have reported on two rather different pilot studies that show some similarities for what concerns the link between Service Design and Organisational Change.

1. Service Design Often Begins at the Organizational Periphery: Because service designers are mostly concerned with the kinds of experiences services offer for people and because most organizations think of services as "products" conceived, planned and delivered for people external to the organization, it is not surprising that service designers often find themselves at the organizational periphery at the start of their work. In the two case studies presented here, the design teams begun their initial work at the 'periphery' of their respective organization. For each organization, the marginal location limited the interference of the design work in the daily operations of the organization. The library head granted access to the library but only under severe restrictions. The college assigned one PD group and made it (initially) rather difficult to talk to other staff. The (re)design of service experiences can therefore become both a deadlock or a gatekeeper for deeper organisational insights and potential transformative impacts.

2. *Building Trust Relationships for Change*: In both case studies, some of the initial limitations were overcome by the respective design teams over the period of the project. In the library case, the design team managed to gain the trust and participation of several librarians and other stakeholders. In the college, the design team was able to present its final findings to a group of PD Tutors and the Head Teacher, who requested access to the findings and some of the tools the team had developed and successfully employed. This was possible developing trust and collaboration during the process. Key factors were a collaborative and flexible approach that builds on agreed targets, the identification of gatekeepers in the organisation and of existing or emerging conflicts, the maintenance of transparency in the use of information, the adoption of an ‘appreciative inquiry’ approach [21] but most of all by generating interest and stimulate the generation of a vision by introducing new variables and perspectives.

3. *Develop transformative insights*: To generate genuine interest and commitment requires developing transformative insights into the organisation fundamental assumptions, values, norms and behaviors; this to build trust in the process, generate interest and co-create a new vision based on internal positive traits (positive psychology) and external potential rewards. The aim is to facilitate a joint-reflective process that enables learning as main output.

4. *Pilot projects as seeds for change*: As shown also by service design practitioners, pilot projects can have a fundamental role to open the way to transformative changes as, in a similar way to prototypes in a design process [22], they help designers to make tangible the intangible, such as behavioural patterns, values and norms that shape organisations and their products. Pilot projects can also provide insights into new modes to look and work on problems (design thinking), can materialise and share knowledge gained through the joint-reflective process and generate a vision that can guide transformative interventions.

5. An orienting framework

Both projects started at the periphery of the organisation, exploring the service experience and interface, and used this process of investigation and designing service improvements as a way to engage with the organisation to gain insights into their structures and fundamental assumptions. At the same time as both projects started as an open inquiry into the organisation, design researchers guided the process toward what was more ‘relevant’ to the organisation and to the quality of its service provision. We argue that this openness can still be ‘rigorous’ in terms of transformational approach if designers consciously reflect on their position and role within the organisation. Based on the research projects outcome and literature review we therefore propose a first framework that can orient this ‘reflection-in-action’. As represented in *Figure 2*, Service Design projects can gain different levels of depths into the organisation and can have therefore different kinds of outcomes and impacts:

1. *Service interaction design*: service designers have been traditionally focused on the design and re-design of service interactions, drawing skills and knowledge from the long tradition of designing interactive product interfaces and of user-centred design. All changes at this level can have small/large, temporary/lasting

impacts into the organisation. If the suggested improvement remains at the periphery, meaning it suggests new/improved artefacts, without really questioning norms or values behind it, we argue that the impact will remain a contingent one.

2. *Service design intervention*: when the re-design and improvement of service interactions need small or larger changes in the organisation, questioning its norms and values, service designers need to re-think the organisation elements around the new service experience; this requires a capacity to engage the organisation, to visualise and demonstrate the value of change and the ability to read and interpret the organisation itself. The organisational change is not necessarily a radical one, if the new service concept doesn't affect deeper fundamental assumptions.

3. *Organisational transformation*: when the service concept requires deeper transformations that touch into the fundamental assumptions of the organisation, then designers might meet stronger resistances; they should use the design inquiry as a conversation with the organization to unveil their deeper assumptions, showing how these frame their current situation; they should work together toward an agreed vision of where the service should evolve and co-create an agenda for change. This requires a long-term collaboration and a stronger commitment from the organisation as an all.

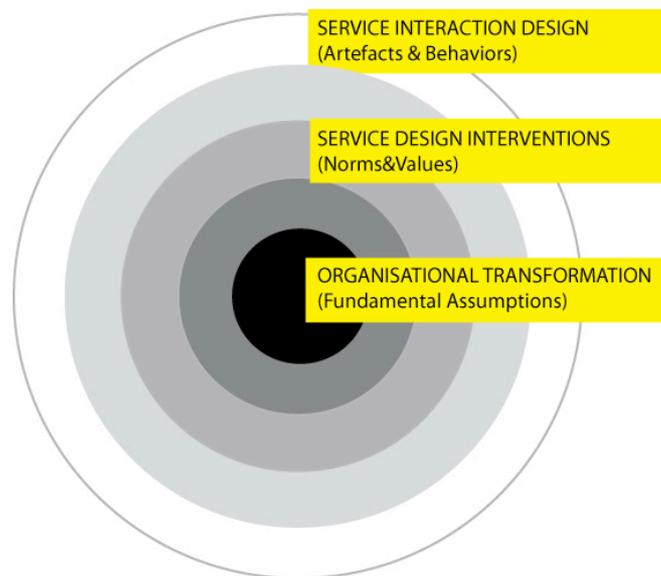


Fig. 2 Levels of potential impact of Service Design projects

6. Conclusions

As Kimbell pointed out [23; 9] Service Design is still an emergent discipline based on mainly informal and tacit knowledge, but it might develop into a more structured discipline if it develops a closer dialogue with existing disciplines such as service management, service marketing, or service operations. This paper aims to contribute to this effort and with that to a commonly shared and sharable research rigour based on design-practice in this emerging discipline. Based on our own research and practice experience and informed by the above mentioned literature, we think that the methods and theories in organizational change are of particular

relevance as service design matures as an area of practice and research. We suggest that service designers can add rigour to their practice if they learn how to reflect on their position and role within the organisation and make use of this knowing-in-action [1] to direct their projects towards the kinds of transformational outcomes they seek. Our proposed orienting framework can guide this reflective inquiry.

We would like to further explore the links between service design and organisational change with practitioners, using our framework as a base. Among other things, we would like to find out in 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.

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