

## ACCREDITED TRAINER

### Self-assessment by Anna-Sophie Oertzen

SUBMITTED ON 01 JUN 2019



#### My educational background is:

I studied International Business Studies in my Bachelor at Maastricht University, followed by a M.Sc. in Management at Nova School of Business and Economics and a M.Sc. in International Business with a specialization in Strategy and Innovation at Maastricht University. During my Bachelor and Master degrees, I came in contact with service design throughout placements at the Service Science Factory (SSF) that focuses on developing customer-centric business models through the transformative power of service design and service innovation. At the SSF, I was part of the project management of European-wide assignments; for instance, crafting a servitization strategy for a major player in the artisan baking industry to unlock new revenue streams and increase competitiveness. For more information on this particular project, please refer to <http://www.servicesciencefactory.com/index.php/portfolio/puratos/>.

Seeing the results of applying service design methods and tools to elicit insights from multiple stakeholders convinced me of the importance of service design; however, I felt there was more to it than using service design as a toolset. To further understand service design as a perspective, I joined the Marie Curie training network "Service Design for Innovation", funded by the European Union as part of the Horizon 2020 Research and Innovation Programme. Here, I am currently finalizing my Ph.D. on the co-creation of services, drawing from service design, service marketing, and service innovation perspectives.

To expand my theoretical understanding of service design, I have taken multiple courses / workshops in Italy, the Netherlands, Germany, Sweden, Portugal, and the USA. To name a few: Service Design Master Session; Designing Services for Stakeholder Participation in Value Co-Creation; Disrupting Service Networks-How to Sensitize Organizations for Planned and Unplanned Changes; Service Innovation Research; and Innovation and Development of New Products and Services.

To also further my practical education on service design, I have had a five-months placement at the headquarters of the Service Design Network, engaging in many different training and research activities. Additionally, I had the fantastic opportunity to undergo extensive training, supervised by Prof. Birgit Mager, President of the Service Design Network and first Professor in the field of Service Design. To develop my capabilities as a service design trainer, I first participated in multiple-day trainings on service design, then gave trainings myself with Prof. Mager supervising and providing extensive feedback, and finally hosted my own service design trainings. Most recently, I hosted a two-day training on service design basics as part of the SDN Academy with 20 participants from diverse backgrounds and nationalities (Brief summary of the event here <https://www.service-design-network.org/headlines/sdn-academy-service-design-basics-april>)

#### I currently work at/as a:

Since May 2016, I am a Research Fellow with the Marie Curie Service Design for Innovation Network (<http://servicedesignforinnovation.eu/about-sdin/early-stage-researchers/>) and am currently finalizing my Ph.D. To this end, I am employed by the Köln International School of Design, Technical University of Applied Sciences, and enrolled at the department of Marketing and Supply Chain Management at Maastricht University. In my research, I focus on what motivates customers to engage in co-creation and how co-



creation may be used to design and deliver profitable services. Specifically, I am interested in innovating services through co-creation with different stakeholders that are customer-centric, yet profitable for the firm. To find out more about my current research endeavors and how they link to service design, please refer to the recent interview that Jesse Grimes, Editor-in-Chief of Touchpoint, the international Journal on Service Design, conducted with me (<https://www.service-design-network.org/community-knowledge/meet-anna-sophie-oertzen>).

**I have X years of experience applying service design in projects in order to improve or innovate service offerings for my clients:**

5.5

**I have particular experience in the following service sectors:**

I have been working on initiatives in diverse service sectors, encompassing healthcare, pharmaceutical, finance, consumer goods, transport, food, and information services.

**I regularly participate in service design-related activities in order to stay up to date, share my experiences with peers and get their supervision. Within the last 12 months, I have participated in the following activities:**

- SDN Global Conference
- Activities

**I actively support the local or national service design community through:**

Giving talks at national and international events, providing trainings on service design, and publishing in international outlets.

**I have participated as a speaker in the following events:**

Some examples of talks I have given in the last twelve months:

Topic: Bauhaus 4.0 meets Service & Interaction Design: Interaktion mit allen Sinnen – wie Erfahrung in Zukunft gestaltet wird

Where: Panel discussion organized by the Deutscher Designtag, the umbrella organization for all design-related activity, in Bremen, Germany

When: March, 2019

Link: <http://www.designtag.org/bauhaus-4-0/podium-3/>

Topic: Service Design and Co-Creation

Where: Event hosted on the premises of Koos Service Design together with the Dutch SDN Chapter in Amsterdam, Netherlands

When: February, 2019

Link: [https://www.meetup.com/de-DE/SDN\\_Netherlands-Workouts/events/258588524/](https://www.meetup.com/de-DE/SDN_Netherlands-Workouts/events/258588524/)

Topic: Customer Engagement in Service Co-Creation

Where: Service Design for Innovation Conference in Porto, Portugal

When: February, 2019

Link: <http://servicedesignforinnovation.eu/sdin-final-conference-porto-february-6th-2019/>

Topic: The Drivers of Customers' Co-Creation Behaviours

Where: The CCIS-CE (Co-Creation in Service and Customer Engagement) Symposium in Adelaide, Australia

When: December, 2018

Link: [https://www.researchgate.net/publication/332902243\\_The\\_Drivers\\_of\\_Customers'\\_Co-Creation\\_Behaviours](https://www.researchgate.net/publication/332902243_The_Drivers_of_Customers'_Co-Creation_Behaviours)

Topic: Designing for Diverse Personalities in Service Co-Creation

Where: The 20th ANZMAC (Australia and New Zealand Marketing Conference) in Adelaide, Australia

When: December, 2018

Link: Please find an abstract to the talk on pp. 663-666 <https://anzmac2018.com/wp-content/uploads/2018/11/ANZMAC2018-Proceedings.pdf>



Topic: Integrating Empathy and Lived Experience through Co-Creation in Service Design

Where: The 6th ServDes (Service Design and Innovation) Conference in Milan, Italy

When: June, 2018

Link: <http://www.servdes.org/wp/wp-content/uploads/2018/07/37.pdf>

Topic: Co-Creating Offerings: A Maturity Model

Where: The 10th SERVSIG (Service Special Interest Group) Conference in Paris, France

When: June, 2018

Link: Please find an abstract to the talk on pp. 462-467 <https://www.ieseg.fr/wp-content/uploads/2018/02/SERVSIG-2018-Proceedings.pdf>

Topic: Mitigating the Risks of Co-Creation by Integrating Empathy and Lived Experience in Service Design

Where: The 10th SERVSIG (Service Special Interest Group) Conference in Paris, France

When: June, 2018

Link: Please find an abstract to the talk on pp. 182-187 <https://www.ieseg.fr/wp-content/uploads/2018/02/SERVSIG-2018-Proceedings.pdf>

### **I have published the following books/articles on service design and related fields:**

Please find below full paper publications. For abstracts or short paper publications, please refer to the links of the previous section.

- Oertzen, A.-S. (2019), "Anna-Sophie Oertzen - Meet the service designer", Touchpoint, Vol. 10 No. 3, pp. 86-88. <https://www.service-design-network.org/community-knowledge/meet-anna-sophie-oertzen>

- Oertzen, A.-S. and Odekerken-Schröder, G. (2019), "Achieving continued usage in online banking: A post-adoption study", International Journal of Bank Marketing. doi:10.1108/IJBM-09-2018-0239 <https://www.emeraldinsight.com/doi/pdfplus/10.1108/IJBM-09-2018-0239>

- Vink, J. and Oertzen, A.-S. (2018), "Integrating empathy and lived experience through co-creation in service design", ServDes, Proof of Concept. Linköping University Electronic Press, pp. 471-483. <http://www.servdes.org/wp/wp-content/uploads/2018/07/37.pdf>

- Oertzen, A.-S., Odekerken-Schröder, G., Brax, S. A. and Mager, B. (2018), "Co-creating services—conceptual clarification, forms and outcomes", Journal of Service Management, Vol. 29 No. 4, pp. 641-679. doi:10.1108/JOSM-03-2017-0067. <https://www.emeraldinsight.com/doi/full/10.1108/JOSM-03-2017-0067>

- Manhaes, M., Oertzen, A.-S., Mager, B. and Tanghe, J. (2017), "Six Priorities to Promote Service Design in Academia", Community Knowledge Pages of the Service Design Network, pp. 1-9. <https://www.service-design-network.org/community-knowledge/six-priorities-to-promote-service-design-in-academia>

### **The following theories are the key components of my approach to service design:**

- Co-creation of services
- Service innovation
- Service marketing
- Service-dominant logic
- Ecosystem perspective
- Participatory design
- Empathy and lived experience

### **My philosophy as a trainer/coach is:**

When designing and facilitating an educational experience, it is important to apply service design principles also for the training itself. Especially when coaching service design, the training experience needs to mirror the content that is being taught. Hence, I try to purposefully make the training interactive, multidisciplinary, contextual, and holistic. I further aim to iteratively include facets of divergent and convergent thinking



and also highlight the sometimes messy, sometimes structured nature of the service design process. Especially in multi-day trainings, it is important to strike a balance between theoretical input and practical engagement. To keep up the motivation, I include little energizers, such as the 30 circles challenge, and try to always illustrate the theoretical input on practical examples. In summary, my motto for any educational activity is "Be structured and systematic, but also cheerful and creative"!

**I have provided service design training sessions for X years:**

3.5

**Here is a list of all service design training sessions and/or other educational experiences I've facilitated within the last year:**

Title: Service Design Basics Workshop

Where/when: Cologne, Germany in April 2019

Attendees: 20 participants

Duration: 2 days

Links: <https://www.service-design-network.org/headlines/sdn-academy-service-design-basics-april>

<https://www.service-design-network.org/events/service-design-basics-with-workshop-trainer-anna-sophie-oertzen-and-co-trainer-cristine-lanzoni?fbclid=IwAR37orBQAEIT9G6vmA3rj6va9gzaUDUBBACg5k8FsHJ6GGsP9-qcYERKlZA>

Title: Service Design and Co-Creation

Where/when: Amsterdam, Netherlands in February 2019

Attendees: 45 participants

Duration: 5 hours

Links: [https://www.meetup.com/de-DE/SDN\\_Netherlands-Workouts/events/258588524/](https://www.meetup.com/de-DE/SDN_Netherlands-Workouts/events/258588524/)

[http://picdeer.com/media/1977532611614652199\\_5443340967](http://picdeer.com/media/1977532611614652199_5443340967)

Title: Service Design Basics – A KISD Seminar

Where/when: Cologne, Germany in November 2018

Attendees: 20 participants

Duration: 2 days

Title: Designing for Diverse Participation in Service Co-Creation – A Brown Bag Seminar

Where/when: Maastricht, Netherlands in July 2018

Attendees: 22 participants

Duration: 2 hours

**I mostly provide my offerings in the following language(s):**

English or German

**I mostly provide my offerings in the following countries/cities:**

Germany, Netherlands, Portugal

**I cover the following topics during my training sessions:**

- Leadership/management of service design projects
- Working with complex service systems
- Creativity and ideation processes
- Prototyping of services
- Implementation of service design concepts
- Visualisation techniques
- Design and conduct of co-creation workshops



- SD logic
- Differentiation between service design, service marketing, design thinking, service branding
- User research/deep customer insights
- History of the service economy

### These are the most relevant resources I base my work on and I recommend to participants:

While this is only a snippet of the literature I like to draw from, I think it provides a fitting overview on what service design is, how to apply it, and potential pitfalls when doing so.

- Vargo, S. L. and Lusch, R. F. (2016), "Institutions and axioms: an extension and update of service-dominant logic", Journal of the Academy of Marketing Science, Vol. 44 No. 1, pp. 5-23.

This article of Vargo and Lusch builds upon and extends their seminal piece on the service-dominant logic, published in the Journal of Marketing in 2004. I think for anyone seeking to understand the "service" in service design, service-dominant logic is a fundamental theory/logic to acknowledge.

- Mager, B. and Sung, T.-J. D. (2011), "Special issue editorial: Designing for services", International Journal of Design, Vol. 5 No. 2, pp. 1-3.

This is the editorial for a special issue on designing for services in the International Journal of Design. In my opinion, the entire special issue is worth a read, and this editorial gives a great concise overview on what service design is and an introduction to the seven studies within this special issue.

- "Design Thinking and Service Design Doing" (2016), Touchpoint, Vol. 8 No. 2

I really enjoy taking a look at this issue of Touchpoint every now and then. It has some talented design experts giving their two cents on design thinking and service design. For anyone looking for different angles on the topic, I would recommend this issue.

- Stickdorn, M., Hormess, M. E., Lawrence, A. and Schneider, J. (2018), This Is Service Design Doing: Applying Service Design Thinking in the Real World, O'Reilly Media, Sebastopol, CA.

Whenever I am designing a service design training and am looking for input, such as an easy ice-breaker or a good explanation on how to develop personas, this is my go-to book.

- Farrington, C. J. (2016), "Co-designing healthcare systems: between transformation and tokenism", Journal of the Royal Society of Medicine, Vol. 109 No. 10, pp. 368-371.

I use and recommend this article, because it highlights the risks of a participation façade. Co-creation / co-design / participation are all concepts that are nowadays often used as buzzwords. While I am certainly in favor of integrating different stakeholder perspectives, care needs to be taken that their insights are truly integrated beyond tokenistic approaches.

### These are the service design methods and tools that I use during my sessions:

- Qualitative and quantitative research methods (autoethnography, desk research, interviews, observations, surveys, conjoint analysis, interactive research workshops, experiments, etc.)
- How to collect information (research plan, etc.)
- Ways to present the collected information (ecosystem map, research wall, etc.)
- Using the information for different kind of analyses (needs analysis, trend analysis, stakeholder analysis, competitor analysis, etc.)
- Condensing the collected information (key insights, how might we questions, etc.)
- Ideation methods (creative techniques, brainstorming, association, analogies, etc.)
- Synthesizing ideas (service concept, voting, design brief, etc.)
- Personas
- Mapping (user journey map, empathy map, storyboard, etc.)
- Higher value proposition
- Service blueprints
- Canvases (value proposition canvas, business model canvas)
- Prototyping and mock-ups



- Testing concepts, collecting information, and iterating (feedback plan, feedback capture grid, etc.)
- Implementation (service roadmap, action plan, evaluation framework, etc.)

### These are my favourite cases I use to inform about the impact and value of service design:

- Hellon London / Musgrave: Baby - Reducing Stress and Increasing Parent Spend Through Design (<https://www.service-design-network.org/headlines/hellon-baby-reducing-stress-and-increasing-parent-spend-through-design>)
- Birgit Mager: Levenskracht. On the Road (<http://sedes-research.de/portfolio/levenskracht/>)
- Continuum / South West Airlines: Digital Wayfinding Design & Prototype (<https://www.service-design-network.org/headlines/continuum-digital-wayfinding-design>)
- Own cases

### I apply the following evaluation tools to make sure the participants have understood the content of my sessions and gained the expected competences/skills:

If it is a multiple-day training, I like to have a practical case for which participants have to (re-)design a service concept and present it. For the last Service Design Basics training, Lab 1886, the incubator of the Daimler AG, gave participants a design challenge on micro-mobility (problem statement & service requirements). Besides the design challenge, clear evaluation criteria were given to participants. For the next two days, I asked participants to practically apply their new knowledge to the case after explaining a new method or tool. Step-by-step, I guided them through the process of designing a service concept in response to the design challenge. At the end of the second day, participants presented their service concepts to a representative of Lab1886 and received feedback based on the initial evaluation criteria.

### After successfully attending my training sessions, participants will typically be able to:

- Understand the conceptual properties of the concepts "service" and "design"
- Know the principles and processes of service design
- Have gained insights and experienced the ideation, conceptualization, prototyping, and/or testing phases when (re-)designing a service
- Apply service design methods and tools in practice
- Depending on the length of the training / project, are able to leverage service design methods and tools in their own organizations

### I always ask for feedback on my offerings and I systematically evaluate and improve. Examples of some feedback that led to improvements:

If the group is not too large, I like to do the "I liked, I learned, and I wished" exercise, because it involves every participant and different feedback aspects. An exemplary feedback that I got for a two-day training is that participants would prefer having the same practical example for all newly-introduced service design methods and tools. Thus, for my last Service Design Basics training, I used the case of Hellon London / Musgrave to practically explain all methods and tools. Another feedback I received was that it would be great to have "more service design" in the organisation of a two-day training. One suggestion was having an App, which contains all the important information. So currently, I am looking into that as a way to on-board, experience the training, and off-board.

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