Self-assessment by
Joseph Jancsics

A summary about me:

Prior to being a designer, my first career was in financial services as a registered associate. Transitioning careers was initially a pursuit of passion for creativity, receiving training and working professionally as a 3d production artist. The progression into UX was a natural evolution where my animation skills were initially used for UI animations, storytelling, and advanced engineering initiatives. As my proficiency grew as a UX designer, I became drawn to the idea of leveraging all my prior experiences. I brought everything full-circle by embracing a service design approach with a focus at the intersect of design and financial services.

I currently work as a/at:

UX Group Director (Service Design Lead for US region) at EY Design Studio
https://studio.ey.com/
My profile page: https://studio.ey.com/team/joe-jancsics/ (job title needs updating on company website)

My LinkedIn profile:

https://www.linkedin.com/in/jancsics/

My social media channels:

https://twitter.com/JoeJan6
SDN NYC IG featured me here: https://www.instagram.com/p/CRlkBxApugM/?utm_medium=copy_link

My educational background:

Traditional classroom and certifications:

§ MA, Interaction Design (2013) & MBA (2016) from University of Kansas

§ Neilson Norman Group – Service Blueprinting (6/2021)

§ This is Doing – Service Design & Advanced Facilitation (12/2019) (I campaigned for budget approval and brought in external partners Adam Lawrence and Renatus Hoogenraad. I coordinated logistics and helped structure the customized training offered by them to our US studio teams in three different cities.)

§ Cooper Professional Education training – Service Design Immersive (2018); Transforming Customer Experience (2015); UX Bootcamp (2014)

Other / hands-on learning:

§ Currently an active member of the New York Service Design Collective

§ 2013 thesis project focused on an Exploration of Design Jams

§ Hosted the 2013 Global Service Jam in Kansas City, MO

§ Participated in the following Global Service Jam events:

§ 2019 Global Service Jam (Manhattan, NY)

§ 2012 Global Sustainability Jam (Overland Park, KS)

§ 2012 Global Service Jam (Overland Park, KS)

§ 2011 Global Sustainability Jam (Lawrence, KS)

§ 2011 Global Service Jam (Lawrence, KS)

§ Attended the 2011 Service Design Network Conference in San Francisco

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

My process includes gaining awareness from observational insights, interviews, collaborating with subject matter experts, conceptual modeling, and rapid prototyping towards the most suitable design. My professional work ranges from designing new features for implementation directly into existing systems, to casting long-term visions of future service and product experiences.

I frequently work on high-level strategic initiatives dealing with consumer research, persona development, service design, and journey mapping. Many of the participants in my workshops are taking their first dive into the design process, and I enjoy bringing together a variety of thinking styles to enhance creative problem solving.

A key component to my service design approach is the emphasis on collaboration and co-design methods. Often this involves doing and teaching, bringing along stakeholders and client partners for the journey. I've managed to reframe journey maps away from being seen as mere deliverables, instead using them as strategic tools for aligning organizational components/systems, challenging status quos, and prioritizing prototyping efforts.

These are the most relevant resources I base my work on and I recommend them as a body of knowledge in service design:

The Experience Economy by Pine & Gilmore — We read this in my graduate course for Designing Business Services. I always felt the authors make a strong case for designing experiences that can be transformative, and the value of theater as a metaphor for service delivery.

This is Service Design Doing — I've always recommended this as a solid reference for service design. The companion methods book gives a more tactical playbook. I worked directly with Adam Lawrence to deliver training to 90 designers in 3 different studios at EY, and copies of this book were provided to all our participants.

Other articles I share with designers for base material on service design:

• http://www.practicalservicedesign.com/service-design-101

• https://discover.academyxi.com/blog/5-advantages-of-service-design/

• https://uxdesign.cc/whats-service-design-and-why-does-it-matter-5025ca624f2

• https://www.nngroup.com/articles/service-design-101/

Most importantly, I learned service design through doing. I participated in the first global service jam back in 2011, then continued to host and participate in many years that followed. I always tell newcomers to join the next service jam they can find. Roll up your sleeves, learn through doing. I actively stay involved with my local NYC SDN chapter and have sponsored events with them using the EY Design Studio. I encourage my team to join their virtual events and we usually have a solid group in attendance.

I have X years of working experience in service design:

10

My working experience in service design includes involvement in:

• Service design projects

• Service design consultancy

• Service design training

I have particular experience in the following service sectors:

Financial services, Healthcare, Insurance, Consumer electronics

I have conducted X service design projects that aim at creating improvements or innovations within organisations:
6

These are the service design projects I have successfully delivered:

March 2021-present
• Leading asset management broker/dealer firm (client name confidential)
• Service and system mapping post-acquisition of discount online broker.
• Client acquired another firm, and I am leading their teams on using service design methods to illustrate current and future state services. The work has identified a need for a new specialized team of virtual consultants to serve consumers who would otherwise have unmet needs. Adding this new team gives more flexibility for servicing dual-clients (I.e., clients with accounts at both firms). I created a series of templates being leveraged to illustrate backstage system component and untangling the current-state of external partners to align a future-state with a unified back end. This engagement has a heavy element of user narrative driven scenarios, combined with deep systems-mapping.
• Client was previously unaware of service design and are now considering extending my engagement and building a team.

Aug 2020-Dec 2020
• Major Commercial Bank (client name confidential)
• Mid-Tier Wealth Service Design – current state analysis and future state vision for clients with net worth of $2mil-20mil assets under management.
• My facilitation efforts were used to deliver more than 7 workshops, with additional ad-hoc sessions around narrative development and prototyping. We delivered 7 detailed blueprints focused on the future-state wealth management experience, an end-to-end strategic map as a reference point, an interactive prototype, and a narrated video with motion graphics overlays to highlight key new services.
• Our work set the client towards defining their future state. The service design engagement opened many avenues for follow-on work sold to the client, with teams currently underway executing on plans we illustrated.

Nov 2019-March 2020
• EY Global Data Office
• EY had an internal product in need of a service design approach to understand implications beyond the immediate user interface. The project had a history of not gaining traction, and I was brought in for the final months of an effort previously spanning over a year. I led service designers in New York and at our EY Seren studio in London. The project was centered around collecting client data in a secure environment and allowing data scientists the ability to train machine-learning models. Compliance and privacy were of utmost importance. We conducted qualitative interviews with stakeholders and potential users. I employed structured card-sorting activities to have research participants sequence their activities and talk us through their process. We discovered personas based on the research data. We illustrated several connected-journeys based on a shared narrative with multiple actors (I.e., users). Our work concluded with an interactive prototype showing the data intake process and also an interactive data marketplace for hosted content.
• The EY Data Office had leadership changes and the findings from our work were carried forward for their phase 2 redesign plans.

Apr 2019-Oct 2019
• Wealth Management Firm (Client confidential)
• Client was seeking ways to integrate new systems and augment existing systems for servicing wealth management clients.
• I arrived at this client with a team underway and they had never been exposed to service design methods. I led several workshops using ecosystem canvases, empathy mapping, blueprints and journey maps. Deliverables included interactive prototypes, a placemat to illustrate goals-based planning systems, and two detailed journey maps with UI illustrations in the bottom swim lane showing future-state components for servicing staff. We also facilitated focus group sessions to weigh in on design concepts and early low-fidelity prototypes.
• This client leveraged the deliverables towards augmenting their existing systems to support the narratives we outlined. The client expressed a desire to print our journey maps to hang in their offices (I lost visibility if they actually printed and decorated the space with our maps when I stopped traveling to their site and was assigned to another client. I had a family emergency and needed to stay local).

Nov 2017-Feb 2018
• Leading Health Insurance Company (client confidential)
• I was brought on to build the approach and manage a team to deliver a series of life-event driven journey maps, showcasing new capabilities

based on trends within emerging technology. Research was focused initially on stakeholder interviews. I was able to push for approval to listen in at the call center to hear the actual members calling in. We also interviewed the call center reps to get their perspective on workflows and servicing. We ran multiple workshops to define the ecosystem shared by providers, members, and insurers. A set of provisional personas was used to pair up hypothetical diagnosis events and story synapsis; a stakeholder voting session determined the stories we would illustrate during the engagement. We hosted workshops and delivered a series of 10 life-event driven detailed journey maps, with illustrated definitions of key capabilities and concepts. A video was produced to show scenario demonstrations of multiple virtual and technology-enabled healthcare and therapy services.

• The materials we produced are used by executives to make decisions on strategy and to win sponsorship from their board of directors. Looking back, it's interesting how already many of our predictions on trends came true, partially due to the global pandemic accelerating the need for virtual healthcare services.

Nov 2014-Oct 2017
• DST Systems (now SS&C Technologies)
• I served as an in-house designer as the UX Lead for Retirement Solutions. A large portion of my work was conducted with service design methodologies. I organized and ran qualitative research interviews with 30 retirement plan participants. Data from research was synthesized into themes, and behavioral correlations resulted in a set of research-driven personas. These personas became standard in the Retirement Solutions division. I ran a large initiative leveraging our research-driven personas through a structured service design canvas flow to define future state solutions. We used a customer lifecycle empathy and system map to define the most compelling persona narratives to start with. For each persona, we then went through ecosystem mapping, current state blueprint, pain-point identification, opportunity spotting, and then an ideal future-state blueprint. Journey maps were created to build out the finer points of the narrative, for both current and future states. Follow-on work was conducted where prototypes were illustrated and presented to the head of Retirement Solutions for development roadmap approval.
• My supervisor and the head of product said it was the best design work presented to that segment. I presented a portion of this work at the 2016 DST Advance Conference to clients and the feedback was overwhelmingly positive. The Retirement Solutions executive lead's response was the budget was lacking and all development resources were trapped under a massive backlog for the next several years. I left the company a few months later, and a few months after that, they were purchased by a competitor.

I have provided service design training sessions and/or other educational experiences for X years:

8

My philosophy as a trainer is:

My style based on trust, compassion, creativity, inclusivity, and empowerment. I feel that successful service design training, or any design training, should have a large emphasis on doing. The magic of learning happens through doing. Context is important, so I always like to reference artifacts from well-established sources. I always like using a set of service design canvases derived from my multiple trainings with Cooper Design. Service design is a team sport, so whenever possible I like to have some breakout groups working through activities within a workshop. Storytelling and sharing are essential communication modes within service design, and I feel it's important to allow participants space to engage in those.

These are the service design training sessions and/or other educational experiences I've facilitated within the last year:

April 2, 2021
1 hour
Ethical Analysis Applied to User Experience
EY Design Studio
50+ attendees
This was a 1-hour presentation on ethical foundations and ethical decision-making, with examples of case studies related to UX design. Polling questions were launched during the training to enhance learning and reinforce certain concepts.
(Will be teaching this session again on October 28th for an engineering team at EY).

July 19, 2021

1 hour

Service Design 101 Lunch and Learn

American Express

50+ attendees

This was a 1-hour high-level presentation/training session of Service Design to an audience of design and product employees at American Express.

Also ran Service Design 101 earlier in the year in a longer 2-day format for an internal team at EY for the Be Digital offering. We structured the Go To Market strategy for the Be Digital offering around a service design lens, referencing academic material of Activity Theory as it applies to the modern workplace.

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

English

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

USA, New York

I cover the following topics during my training offerings:

- Definition of service design
- Service dominant logic
- User research/deep customer insights
- Designing and conducting co-creation workshops
- Creativity and ideation processes
- Visualisation techniques
- Prototyping of services
- Implementation of service design concepts
- Measuring impact of service design, relating it to Key Performance Indicators (KPIs)
- Building in-house service design capabilities
- Working with complex service systems
- Organisational development

My training participants typically have the following level of experience:

- Novice (new to service design)
- Fundamental (basic knowledge)
- Advanced (practical application)

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

Anecdotally, I like to talk about Starbucks and how they found success layering in language with their ordering. In a subtle way, the ritual of ordering a "venti" or a "grande" latte, feels more sophisticated than ordering a "small" or a "large." It's intentional, the baristas enforce it and will almost correct the consumer when they don't use the in-store vernacular. On some level, this allowed everyday consumers to feel like they were on a vacation or a trip to another place, even just for a moment. Consumers are willing to pay $4 for a coffee when the experience feels exotic or like an escape. The use of language was intentional to create this feeling, and the historical success of Starbucks is evidence of the loyalty they've built with their core segments of buyers.

Another example I like to reference is Uber. Not just the app. The driver's experience. The car you sit in, whether they offer bottled water or magazines to read, the cleanliness, etc. The drivers can personalize the experience, and it's a layered service design with some centralized elements with constraints, and other elements are decentralized and up to the driver to decide.

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I also like to use food delivery services as an example. You have an ecosystem of consumers, online ordering platforms, delivery people, the restaurant, the kitchen, and any loyalty programs to encourage repeat engagement. I always say if you ever want to sell more than once to someone, then you are in the service business. Almost everything in the digital age can be viewed and approached through the lens of service design.

Many of my favorite articles on the web from Cooper Design are no longer hosted online. I've recently been working on new Service Design Go to Market (GTM) materials for the EY Design Studio. One of our challenges is around framing service design for a new audience in a concise package. It will be a conversation-starter. For this effort I've been collecting material to build the case for Service Design aimed at our prospective clients. See more detailed insights are on a Mural board (WIP):
https://app.mural.co/t/discoverey9225/m/discoverey9225/1631634319433/e89d8b430a6ebd3a2964ea2bc64a7d6b1b8d2400?sender=joejancsics0752
Links below with distilled relevance to my GTM project —
Article Link 1: http://www.practicalservicedesign.com/service-design-101
A1 Note: Key terms may be useful on a slide to ground the language of service design
Article Link 2: https://www.oreilly.com/library/view/this-is-service/9781491927175/ch01.html
A2 Note: Solid material on business value and "why" service design, business reasons for approach.
Article Link 3: https://discover.academyxi.com/blog/5-advantages-of-service-design/
A3 Note: Service design introduces necessary constraints for consistency in collaboration, while staying grounded in research and flexible enough for anyone to participate towards positive outcomes.
Article Link 4 https://uxdesign.cc/whats-service-design-and-why-does-it-matter-5025ca624f2
A4 Note: Nothing exists in a vacuum. Service design addresses complexity and improves outcomes for experiences spanning across technologies and business silos.
Article Link 5: https://www.nngroup.com/articles/service-design-101/
A5 Note: Practical examples and simple explanations, good article for defining service design in an understandable way.

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

When training on Service Design we have slides and materials to run through the definition of service design, how it differs from product, and usually I like to share a Mural canvas to show the strategic connections between different service design canvases. A link to the Mural is here: https://app.mural.co/t/discoverey9225/m/brandcatalyst2516/1556305346407/0add02a5defacd1303dc2433531c7517a8874c75?sender=joejancsics0752

One of the things I emphasize is that a journey map should not be the end-goal or deliverable. It should be thought of as a strategic tool, to help clarify prototyping opportunities. The journey maps and blueprints are extremely important artifacts, but also just as important are the conversations happening during their production. By using sequenced activities it forces teams to slow down before jumping into solutions. Including members of the team in the process builds their level of personal investment, which makes outcomes more successful. I always tell participants to start basic, with simple canvases, and then customize and layer in more information as required, to tailor the fit for the problems being solved.

For introducing an initial journey map, I often leverage 5-E stages: Entice, Enter, Engage, Exit, and Extend. The extend part is important because it's about anticipating what comes next for the needs and opportunities of the consumer. To build a shared understanding, I always avoid jargon and communicate in simple terms for non-design participants.

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

After my training sessions participants gain a base knowledge of understanding a service design approach. They can take away some of the basic tools, but to become successful practitioners usually requires an apprenticeship model. I built a program at EY called "UX Bootcamp"— it was a 5-month mentored program covering a full spectrum of design, with a module on service design and journey mapping. This program ran for 2 years and effectively gave highly capable advisory consultants a platform to build their skills towards joining the design team. We still have members on our design team who were graduates of this program and they are doing excellent work. Light-touch trainings I'm looking to raise awareness and build a shared understanding; heavy-touch trainings I've been able to steer career trajectories for newcomers entering design to launch successful careers.

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

For light trainings we often have polling questions. This is to reinforce the learning and it also makes our courses eligible for internal-EY continuing professional education (CPE) learning hours. For heavy training (I.e., EY UX Bootcamp) we had participants create artifacts and solve real business problems, with group (and peer) portfolio reviews.

I systematically evaluate and improve my offerings based on feedback. These are examples of feedback that have led to improvements:

When I ran UX Bootcamp at EY, our first cohort had a retrospective and a survey. We synthesized the data and determined the students wanted more structure in the program. For the next season, we ended up adding more academic readings with discussion, more hands-on mentorship, and additional office hours. We also tightened up our classes to offer special topics on Design Systems and Typography. The second group was extremely happy and our conversion rate of staffed designers was higher. Ultimately the studio hiring strategy shifted and we could no longer justify using in-house resources to train other in-house talent on top of the pressures of billable client hours, so we ended up closing down the UX Bootcamp program internally. The materials are still used occasionally for ad-hoc trainings, and at some point we may bring the program back to life.

I have participated in the following service design-related activities in order to stay up to date, share my experiences with peers and receive their supervision within the last 12 months:

•SDN Chapter Activity

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

I donate to University of Kansas Architectural & Design program. I have hosted and participated in several Global Service Jam events; welcoming many new designers into the world of service design. I provide mentorship and frequently have informational interviews with students and new graduates as they are coming into design as a profession. I was frequently bringing my team to SDN NYC events and I sponsored two SDN NYC events in the EY Design Studio, but the pandemic has since moved us into Zoom meetups. Once safe to do so, I am eager to host many more SDN NYC in our refreshed design studio!

I have participated as a speaker in the following events:

8/5/2019-8/7/2019
EY FSO Academy Conference
Introduction to Design Thinking
Facilitated five sessions of a 75-minute event, 50 participants in each session, with activities and breakout groups for applying design thinking process to reimagine expense reporting for employees. Audience was management consultants (I.e., non-designers).

3/2/2016
DST Advance Conference
Using Personas to Drive Innovation in the Retirement Space
(I have the deck but no video is hosted online)

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

Thesis work from University of Kansas MA IxD
Slides: https://www.slideshare.net/jancsics/exploration-of-design-jams
Literature Review/Proposal: https://www.slideshare.net/jancsics/proposal-v4-14

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