

## Self-assessment by Jerel Lee

SUBMITTED ON 17 MAR 2021



### A summary about me:

My name is Jerel, and I've been a Service Designer since 2015. I have worked for some of the largest consultancies and design agencies, working with client organisations to better understand their customers & how they can deliver on the promised experience. I believe strongly in 'humanocracy' & in helping my client organisations rediscover their 'why'.

### I currently work as a/at:

Principal Service Designer with Foolproof, a global experience design agency (website: <https://www.foolproof.co.uk/>).

### My LinkedIn profile:

<https://www.linkedin.com/in/jerellee/>

### My social media channels:

Instagram: [https://www.instagram.com/jerel\\_lee/](https://www.instagram.com/jerel_lee/)

Medium: <https://jerel-lee.medium.com/>

### My educational background:

Professional certifications:

- The Open Group Certified Architect - Foundation, TOGAF, 2021
- ITIL 4 Certifications - Foundation, Strategist Direct, Plan & Improve, ITIL, 2020
- Agile Certified Practitioner, Project Management Institute, 2019
- Project Management Professional, Project Management Institute, 2017
- Certified Customer Experience Professional, CX Professional Association, 2017
- Certified Scrum Master, Scrum Alliance, 2017

Educational degrees:

- Masters of Arts in Post-war Recovery Studies, University of York, 2013
- Bachelors of Business Management, Singapore Management University, 2007

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

- Human-centred design: focus on designing for people, be they customers or users
- Co-ideate & co-design: collaborative effort in deriving potential solution(s)
- Rapid prototyping: test ideas to determine their feasibility, fail fast and pivot



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

- Service Design Network: for knowledge (including touchpoint journal, case studies, videos) and network with fellow practitioners (slack channel)
- Service Design tools: an online repository of workshop tools which I commonly use
- Books such as Andy Polaine's et al 'Service Design: From Insight to Implementation', Lara Penin's 'Designing the Invisible' and Marc Stickdorn and Jacob Schneider's 'This is Service Design Thinking': as reference to the workshops/knowledge-building activities

I have X years of working experience in service design:

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My working experience in service design includes involvement in:

- Service design projects
- Service design consultancy

I have particular experience in the following service sectors:

Financial Services, telecommunications and government

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

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These are the service design projects I have successfully delivered:

Project 1:

- Duration: Sep 2018 to Mar 2019
- Organisation: British Multinational Bank - HR function
- Topic: Using Service Design to identify ways to redefine & uplift the Colleague Experience
- Outcome & impact: delivered current and future state blueprints & service operating model; kick-started conversation with senior stakeholders on how to deliver the future state Colleague Experience; two follow-on projects on operations and platform enhancement
- Link: <https://www.jerellee.com/redefining-colleague-experience> (individual portfolio)

Project 2:

- Duration: Jan to Mar 2020
- Organisation: French Multinational Investment Management Firm - Technology arm
- Topic: Using Service Design to understand & improve the institutional client on-boarding experience
- Outcome & impact: delivered current state blueprints; kick-started conversations with senior stakeholders on possible roadmap & way forward; Phase 1 completed but not progressed due to all projects halting with the onset of Covid-19
- Link: <https://www.jerellee.com/blueprinting-investor-experience> (individual portfolio)

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

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My philosophy as a trainer is:

- Conduct interactive sessions instead of one-way knowledge transfer
- Make training relevant to the work participants do

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



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

English

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

London, around the UK

I cover the following topics during my training offerings:

- Definition of service design
- Differentiation of service design to other approaches like design thinking, service marketing and service branding
- Relationship of service design to agile, scrum and lean
- Designing and conducting co-creation workshops
- Prototyping of services
- Measuring impact of service design, relating it to Key Performance Indicators (KPIs)
- Building in-house service design capabilities
- Service design for cultural change

My training participants typically have the following level of experience:

- Novice (new to service design)
- Fundamental (basic knowledge)

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

- Introduction to Service Design by Birgit Mager: [https://www.youtube.com/watch?v=f5oP\\_RIU91g](https://www.youtube.com/watch?v=f5oP_RIU91g) (getting participants to understand what Service Design is)
- Lynn Shostack's Designing Services that Deliver: <https://hbr.org/1984/01/designing-services-that-deliver> (allowing participants to understand the history of Service Design & importance of blueprinting)
- Redesigning customer service to turn customers into advocates: <https://www.service-design-network.org/case-studies/project-phoenix-service-design-for-tesco-bank-85> (relating a relevant case study to actual challenges faced by clients)

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

- problem framing, including alignment workshop, stakeholder map & current state blueprint
- discovery, including qualitative research, experience mapping & research insights
- ideation, including service storming, storyboarding & prioritisation framework

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

- understand the definition & purpose of Service Design
- create an end-to-end experience map (front-stage)

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:

practical hands-on exercises (e.g. blueprinting), with real-time evaluation & feedback

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

"more hands-on exercises", "use of more visuals"

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 Academy Course



- Service Design Campus

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

- Being part of the SDN UK Chapter
- Attending SDN Academy course events

I have participated as a speaker in the following events:

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

Contact details:

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