

Self-assessment by Joseph Jancsics

SUBMITTED ON 05 MAY 2025



A summary about me:

My career journey began as a Registered Associate in the wealth management industry. Driven by a desire for more creative expression, I made a bold leap into design—retraining as a full-time 3D Production Artist and pioneering immersive educational content for digital planetariums and science centers. Building on that foundation, I pursued a UX role in consumer electronics, where I applied animation and storytelling to enhance digital experiences and expanded my cross-disciplinary collaboration skills. Over time, I immersed myself in service design, aligning my career at the intersection of design and financial systems. In recent years, I've introduced service design initiatives to several Fortune 100 companies across healthcare, banking, pharmaceuticals, and technology. In my current in-house capacity, I focus on advancing service design within complex, regulated environments to drive strategy, foster collaboration, and deliver scalable, human-centered solutions.

I currently work as a/at:

Principal Service Designer — CB/CIB Digital Design Innovation at Wells Fargo

My LinkedIn profile:

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

My social media channels:

<https://twitter.com/JoeJan6>

My educational background:

Traditional classroom:

- MA, Interaction Design (2013) — University of Kansas School of Architecture & Design
 - o Postgraduate thesis focused on an Exploration of Design Jams
- MBA (2016) — University of Kansas School of Business

Corporate-sponsored training:

- Jeff Patton Associates — Passionate Product Ownership (4/2023)
- This is Service Design Doing — Essentials (4/2022)
- This is Service Design Doing — Facilitation Deep Dive (4/2022)
- Nielsen Norman Group — Service Blueprinting (6/2021)
- More than Metrics — Intro to Journey Mapping (4/2020)
- This is Doing — Service Design & Advanced Facilitation (12/2019)



o I led the effort to bring in the external partners and helped structure the customized training offered across EY Design Studios in three different cities.

- Cooper Professional Education
- o Service Design Immersive (2018)
- o Transforming Customer Experience (2015)
- o UX Bootcamp (2014)
- Pragmatic Institute — Foundations (2015); PMC Level I (2015)

Community Involvement & Events:

- Active member, SDN NYC Chapter
- Global Service Jam (and Sustainability Jam)
- o Co-host/Organizer — 2013 (Kansas City, MO)
- o Participant — 2011–2019 (Multiple events in KS, MO, and NYC)
- Service Design Network Conference
- o Attendee (Virtual) — 2021, 2022
- o Attendee (In-person) — 2011 (San Francisco, CA)

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

My process centers on gaining awareness through observational insights, interviews, collaboration with subject matter experts, conceptual modeling, and rapid prototyping. My work ranges from designing features for near-term implementation to casting long-term visions of future service and product experiences.

I frequently lead high-level strategic efforts focused on consumer research, persona development, service design, and journey mapping. Many participants in my workshops are engaging with design for the first time, and I enjoy blending diverse thinking styles to foster creative problem-solving.

A core element of my approach is the use of collaboration and co-design methods. I aim to both guide and build alongside stakeholders and client partners. I've reframed journey maps from static deliverables into strategic tools for aligning systems, challenging assumptions, 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 — I read this in graduate school during a course on Designing Business Services. The authors make a compelling case for creating transformative experiences, and I've always appreciated their use of theater as a metaphor for service delivery.

This is Service Design Doing — My go-to recommendation for a comprehensive introduction to service design. The companion methods book is especially helpful as a tactical playbook. I worked directly with Adam Lawrence to deliver training to 90 designers across three EY Design Studios, where copies of this book were provided to all participants.

Service Design Network (general) — I frequently reference SDN as the global hub for our discipline and encourage peers to follow their publications and social channels for ongoing learning.

Other articles I share with designers as foundational reading:

- <https://uxdesign.cc/whats-service-design-and-why-does-it-matter-5025ca624f2>
- <https://www.nngroup.com/articles/service-design-101/>

Above all, I learned service design by doing. I participated in the first Global Service Jam in 2011 and continued to host and contribute in the years that followed. I encourage newcomers to join a service jam, roll up their sleeves, and learn through hands-on practice. I also stay active with the SDN NYC chapter—hosting and sponsoring events—and always recommend people connect with their local chapter to get involved.



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
- 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:

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These are the service design projects I have successfully delivered:

(list below is highlights, not comprehensive)

Aug 2023–Present

Wells Fargo CB/CIB

- Leading Service Design initiatives across Commercial and Corporate Investment Banking, influencing high-growth opportunities across multiple lines of business.
- Established and run a Service Design Community of Practice, providing training, events, and toolkits to drive adoption of strategic collaboration.
- Due to the regulated nature of the role, specific project details cannot be disclosed.

May 2022–April 2023

A leading North American pharmacy chain (client name confidential)

- Led a service design program to enhance health testing and chronic condition management.
- Conducted research across 18 stakeholder interviews, patient studies, and field observations, uncovering key personas and service inefficiencies.
- Facilitated workshops to define future-state solutions, leading to improvements in patient scheduling, multi-service visits, and digital enhancements like a Central Team Hub and Testing Concierge, optimizing both operations and patient outcomes.

Feb 2022–May 2022

Major Banking Organization (client name confidential)

- Led a service design engagement to improve internal systems and processes for developers, architects, and security professionals.
- Conducted research across multiple regions to uncover employee perspectives, forming key personas and insights.
- Developed a Concept Portfolio and Vision Document outlining future-state solutions, aligning recommendations with the client's strategy team for execution.

March 2021–Nov 2021

Leading Asset Management Broker/Dealer Firm (client name confidential)

- Led a service design initiative post-acquisition of a discount online broker, mapping current and future-state services.
- Identified the need for a virtual advisor team to support underserved consumers and enable dual-brand flexibility. Developed system-mapping templates to streamline external partnerships and align a unified back-end.
- The client, previously unfamiliar with service design, recognized its value through future-state modeling, leading to more informed service delivery and compliance alignment.

Aug 2020–Dec 2020



Major Commercial Bank (client name confidential)

- Led a service design engagement for mid-tier wealth clients (\$2M–\$20M AUM), analyzing current state and defining future-state experiences.
- Facilitated 7+ workshops with 80+ contributing members (finance, digital, tech, and compliance), resulting in blueprints, strategic mapping, and interactive prototypes.
- The engagement led to follow-on product execution, enhancing client and advisor experiences while reducing application drop-off rates by 35%.

Nov 2019–March 2020

EY Global Data Office

- Brought in to refine the design approach for a data platform to enable secure data collection and machine-learning model training.
- Led service designers across New York and EY Seren London, conducting stakeholder interviews, card-sorting exercises, and journey mapping.
- Delivered research-driven personas and an interactive prototype for data intake and a hosted content marketplace, informing the next phase of EY's redesign.

Apr 2019–Oct 2019

Wealth Management Firm (client name confidential)

- Led service design workshops to integrate new and existing systems for wealth management clients.
- Introduced ecosystem canvases, empathy mapping, and journey mapping to an organization new to service design. Delivered interactive prototypes, a goals-based planning system, and future-state journey maps.
- The client leveraged these deliverables to enhance their systems and align servicing staff with new workflows.

Nov 2017–Feb 2018

Leading Health Insurance Company (client name confidential)

- Led a service design strategic engagement to define a 3–5 year future-state for a major U.S. healthcare insurer, focusing on data opportunities and emerging technologies.
- Conducted stakeholder interviews, call center observations, and workshops to develop life-event driven journey maps. Delivered 10 life-event driven detailed future-state maps with an accompanying video featuring prototype concepts, which executives used to shape strategy and secure board sponsorship.
- Many predicted trends later materialized, accelerated by the global shift toward virtual healthcare services.

Nov 2014–Oct 2017

DST Systems (now SS&C Technologies)

- Led service design efforts for a B2B2C retirement solutions provider as part of a broader business transformation.
- Conducted qualitative research with 30 retirement plan participants, developing research-driven personas that became standard in the Retirement Solutions division. Designed future-state service blueprints, journey maps, and prototypes.
- Presented work at the 2016 DST Advance Conference to client partners, receiving strong feedback. Successfully launched a Streamlined Enrollment service before the company was acquired.

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:

My training style is grounded in trust, compassion, creativity, inclusivity, and empowerment. I believe successful service design training—like all design education—should emphasize learning by doing. The real magic happens through hands-on engagement.

Context matters, so I incorporate reference materials and artifacts from respected sources, including service design canvases I've adopted and evolved through my Cooper Design training. Because service design is a team sport, I incorporate breakout groups and collaborative activities whenever possible.



Storytelling and peer sharing are core to the discipline, and I make space for participants to reflect, communicate, and co-create throughout the experience.

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

I've delivered a range of in-house sessions on topics such as "Service Design 101 for Non-Designers" and "Design Your Day," aimed at introducing service design in approachable, relatable ways. These sessions help participants build comfort and confidence with the fundamentals, often through hands-on, everyday examples.

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

English

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
- Exploration of systems
- Service design for cultural change
- 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 the service design methods and tools that I use during my sessions:

When leading service design training, I begin by clarifying what service design is and how it differs from product design. I use authored materials and digital whiteboards to illustrate how different canvases and activities fit into the broader design process.

I emphasize that journey maps and blueprints are not end deliverables, but strategic tools that surface prototyping opportunities and drive alignment. The value lies as much in the conversations during their creation as in the artifacts themselves. Sequenced activities help teams slow down, think critically, and avoid rushing to solutions.

My sessions prioritize accessibility—especially for non-designers—by using clear, jargon-free language. I often start with simple canvases and gradually build complexity as needed.

To introduce journey mapping, I often use the 5E model: Entice, Enter, Engage, Exit, and Extend—highlighting the importance of anticipating what comes next for the user. Including non-designers in the process builds investment, ownership, and stronger outcomes.

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

After attending my training sessions, participants gain a foundational understanding of service design, along with practical exposure to core



tools and methods. While short-form trainings provide a working knowledge, I believe deeper growth comes from hands-on experience and guided mentorship.

At EY, I launched and ran a five-month structured mentorship program called UX Bootcamp, which included a dedicated module on service design and journey mapping. The program ran for two years and successfully helped advisory consultants transition into full-time design roles—many of whom continue thriving in the field today.

In my current in-house role, I regularly offer lighter-touch, ad-hoc trainings to build awareness and capability across non-design teams. These sessions focus on learning by doing, with collaborative breakout activities that emphasize co-creation and team alignment.

Ultimately, my goal is to inspire confidence, spark curiosity, and give participants tools they can immediately begin applying—whether they're new to service design or building toward a professional practice.

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 lighter or ad-hoc training sessions, I use post-session feedback forms to gather insights and continuously improve the experience. For more intensive programs—such as the EY UX Bootcamp—participants created artifacts tied to real business challenges and engaged in group and peer portfolio reviews, providing a structured way to assess applied learning and growth.

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, we held a retrospective and distributed a survey after the first cohort. Feedback indicated a desire for more structure and support. In response, we added academic readings with group discussions, increased hands-on mentorship, introduced additional office hours, and incorporated focused sessions on topics like Design Systems and Typography. The improvements led to higher engagement and a stronger conversion rate of participants moving into full-time design roles.

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 offer both formal and informal mentorship to new and experienced service designers, as well as those exploring the field or seeking broader career guidance. I actively attend, support, and promote service design events—especially through the SDN NYC chapter. Each year, I also make a charitable contribution to the University of Kansas School of Architecture & Design to support the next generation of designers at an institution that contributed significantly to my own success.

I have participated as a speaker in the following events:

5/13/2025 – Smart Design in partnership with SDN NYC

Design's Hidden Power: Focusing Inward for Impact

Panel discussion on identifying opportunities for internal improvement, gaining buy-in from colleagues and leadership, and leveraging design to drive meaningful change across teams and organizations.

2/9/2023 – Sponsored Event by Mural

Choosing the Correct Course in Your Multi-Actor Journey

Explored how to evolve collaborative decision-making. I led the production and design of a new canvas for Mural's template marketplace—the "Multi-Actor Journey Map"—developed under the EY Design Studio brand. The event concluded with the official launch of the template.

View the template: [template: https://www.mural.co/templates/multi-actor-journey-map](https://www.mural.co/templates/multi-actor-journey-map)

8/5/2019–8/7/2019 – EY FSO Academy Conference



Introduction to Design Thinking

Facilitated five 75-minute sessions for ~50 management consultants per session. Included hands-on activities and breakout groups focused on reimagining the employee expense reporting experience using design thinking.

3/2/2016 – DST Advance Conference

Using Personas to Drive Innovation in the Retirement Space

Presented strategies for applying persona-based design to retirement solutions, showcasing how insights can drive innovation and service alignment.

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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