

Self-assessment by Ana Urquilla

SUBMITTED ON 24 APR 2023



A summary about me:

Innovation expert with more than a decade experience developing and implementing new services, educational experiences, co-creation efforts, and tools that help multidisciplinary teams from private enterprises, non-profit organizations, autonomous agencies, and academic institutions learn how to innovate through practice. 18 years of experience managing and leading multidisciplinary teams and projects.

Currently, I am the Head of Strategic Design at one of Central America's largest financial groups. Prior to that, I worked as Innovation Director (June 2021 – April 2022) and Director of the Strategic Design Lab (January 2013 – June 2021) at Escuela de Comunicación Mónica Herrera (ECMH) in El Salvador.

I currently work as a/at:

Head of the Strategic Design Center of Excellence
Fábrica Digital at Grupo Financiero Ficohsa
<https://www.ficohsa.com>

My LinkedIn profile:

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

My social media channels:

N/A

My educational background:

EDUCATION

Masters of Education in Leadership and Educational Development
University of Alberta, Canada
2011 – 2013

Bachelors of Fine Arts in Art Studio
University of New Mexico, United States
2002 – 2004

Bachelors of Fine Arts in General Fine Arts
Maryland Institute College of Art, United States
1997 – 2000

SELECTED CERTIFICATIONS

Service Design Practitioner Curriculum & Accreditation
Service Design Network, Germany



January 2022

DIES University Leadership and Management
Carl von Ossietzky University of Oldenburg, Germany
September 2018

Design Thinking Consultant
Universidad de Salamanca, Spain
July 2017

Strategic Design Management
Escuela de Comunicación Mónica Herrera, El Salvador
March 2015

Strategic Management
Escuela de Comunicación Mónica Herrera, La Libertad, El Salvador
January 2014

Adult Learning specializing in Adult and Community Education
University of Calgary, Canada
December 2010

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

I learned both Service Design and Strategic Design through practice. Instead of theories, my teams and I choose to follow principles that guide both our thinking and doing:

1. The process is iterative and flexible, so modify the order of the stages as the challenge and/or team requires.
2. Both research and evaluation are conducted transversely to help us guarantee we have the right information to acknowledge and reduce risks throughout the process.
3. The process is user and organization-centered to make sure that stakeholders' needs, desires, and preferences as well as the connected institutions' (service provider and recipients) organizational cultures, resources, and limitations are considered.
4. Projects are conceived and produced by multidisciplinary teams, which vary according to the specific initiative; and all efforts that include external partners are co-designed and co-evaluated with representatives from these institutions.
5. Our goal is to build functional results that are able to develop emotional connections with service providers and end users.

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

Brown, T. (2009). Change by Design: How Design Thinking Transforms Organizations and Inspires Innovation.

Brown made me fall in love with the strategic side of Design. His writing made me realize I could combine both my creative and critical thinking to help others solve problems and exploit opportunities.

Norman, D.A. (2004). Chapter 3: Three Levels of Design: Visceral, behavioral, and reflective, 63-99. In Emotional Design: Why we love (or hate) everyday things.

Norman made me aware that every solution will be interpreted, consciously or unconsciously, in multiple levels. When I design a service, product, or system, I want the people I design for to connect on all levels with our solutions.

Polaine, A., Lovlie, L., & Reason, B. (2013). Service design from insight to implementation.
Stickdorn, M. & Schneider, J. (2012). This is Service Design Thinking: Basics, Tools, Cases.

These two books inspired me to move my focus solely from Strategic Design to Service Design. Since I read them when I worked in education, the authors' ideas clicked and pushed me to sharpen my skills to develop experiences that could become memorable and transformative to those who live them.

IDEO.org (2015). The Field Guide to Human-Centered Design.

Kumar, V. (2012). 101 Design Methods: A Structured Approach for Driving Innovation in Your Organization.



When I began researching Strategic and Service Design, there were very few books that provided instructions on how to implement design methods and tools. These books pushed me to experiment and inspired me to create our own set of guides (in Spanish) for students and professionals learning how to design.

Wheeler, A. (2012). Designing Brand Identity: An Essential Guide for the Whole Branding Team.

Wheeler's book helped me visualize how detailed we need to be when designing services. It's not just a service we create, but an entire system that should consider every single touchpoint our users will encounter. Every point of interaction will communicate part of the story we want to tell.

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:

Education, Financial Services

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

15

These are the service design projects I have successfully delivered:

1. From June 2021 – May 2022, provide an innovation support service to help internal teams apply the innovation process to build solutions to three organizational challenges: design a sustainable professional development program for faculty, conceptualize new online education services and platform, and (re)define ECMH's pedagogical model.
2. From March-November 2020, deliver innovation support service for 26 ECMH faculty and administrative members' efforts to solve 4 institutional challenges: transition to online learning, maintain sense of community while online, communicate how we responded to COVID-19 pandemic, and provide administrative support to staff, faculty, and students while working from home.
3. From December 2018 - February 2020, design tailor-made consultancy service for Escuela Americana to help stakeholders develop culture of innovation through Design Thinking. We trained 97 staff members, 240 educators, 11 Directors, and 14 parent representatives. 5 innovation projects and 12 administrative and teaching initiatives were approved for implementation.
4. In the Innovation in Education Services Program, participants analyzed educational services to identify stakeholders, visualize users' journeys, identify opportunities, and systematically devise solutions. We implemented 3 editions between 2017-2019, training 12 teams from academic NGO's, universities, private enterprises, and the Salvadoran Institute for Professional and Vocational Training (INSAFORP).
5. The Strategic Design Certification was a nine-month professional development program aimed to train multidisciplinary Salvadoran management teams to use Strategic Design to increase their institutions' competitiveness. We implemented 5 editions between 2013 – 2019, standing out as the most profitable program offered by Executive Education for its first four editions.

To view some of my selected projects, visit: <https://drive.google.com/file/d/1YXNSyk2tuKbiaANKqSdjE59fWAuncGXI/view?usp=sharing>

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 main goal as a facilitator is to create meaningful learning experiences that provide students with practical knowledge and tools they can easily apply in their everyday personal and professional challenges. I believe understanding and awareness should be socially constructed through dialogue and discussion, so both facilitators and students teach and learn. I structure courses to include all (or most) stages of the design process, so participants can experience and experiment with each phase. Course methodologies require multidisciplinary collaboration, so students are requested to work in teams composed of individuals with varied personal/professional backgrounds. Teams choose which real issues, problems, or opportunities they address in class challenges, so they're relevant to them. Sessions are primarily hands-on to allow individuals to play and learn through trial and error, so that practice helps them assimilate new concepts and refine their skills. Teams share with one another their design approaches and lessons learned to promote collective reflection and a deeper comprehension of the design vision and process.



In these experiences, I choose to act as a guide that accompanies individuals and teams in their search for new ways of thinking and doing. I aim to make all learning experiences student-centered to remind participants the beauty behind designing to serve others. I want individuals to learn the do's and don'ts of the process, so they're later able to question, defy, and (re)invent them. I push individuals to leave their comfort zones and make them believe they are capable of outstanding results. I support them to help them embrace their vulnerability and adopt a new love for unlearning. I seek to convey an honest passion and love for what I do to motivate others. Above all, I encourage the importance of enjoying and learning from every aspect of the experience, successes and failures.

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

In my current job, from May 2022 – April 2023, my team and I have designed and facilitated over a dozen internal, regional short workshops aimed at defining and prototyping new digital financial products. However, due to my confidentiality agreement, I'm unable to share the details about these.

In my previous job, these were the most relevant programs and trainings I designed and facilitated from May 2021 to May 2022:

Improving Existing Services through Service Design

August 2021 and March 2022

The Service Design Workshop provided professionals from Salvadoran organizations with an overview of Service Design concepts and its methodology and the opportunity to experiment with some of the most recognized and up-to-date tools in the field.

Independent Study

January – May 2022

Independent Study allows Seniors in the Strategic Design undergraduate program to address project of their own interest while being supported by an instructor of their choosing. Students conduct several iterations of research, ideation, prototyping, and testing to develop user-centered, technically feasible, and economically viable solutions.

In-house Strategic Design PD Program for Banco Agrícola

November 2021 – June 2022

The participating professionals in this tailored-made program obtained a shared understanding of the vision, method, and tools of Strategic and Service Design, so they could use them to solve everyday work challenges.

User-Centered Design Methodologies

July – December 2021

This undergraduate course allows students to strengthen their theoretical foundations of Strategic Design through practice to help them better understand user-centered design. Throughout the semester, students collaborate in teams to address real problems through the design process, seeking solutions that connect to the characteristics of their chosen clients, users, stakeholders, and contexts.

Service Design PD Program for Banco Agrícola's Innovation Team

June – November 2021

This tailored-made PD program was co-designed with the innovation team to address their opportunities for improvement with regards to their design process. While undertaking real challenges and steered by three facilitators, participants experimented with new methods and tools.

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

Spanish and English

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

For Escuela de Comunicación Mónica Herrera – El Salvador

For Grupo Financiero Ficohsa – Online sessions for participants in Guatemala, Honduras, Nicaragua, and Panamá

I cover the following topics during my training offerings:

- Definition of service design
- User research/deep customer insights
- Creativity and ideation processes
- Visualisation techniques
- Facilitation skills for service design



- Prototyping of services
- Business model 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:

I don't usually use documented case studies as part of my teaching experiences. I share examples from the services I designed for the university, the local organizations I consulted for, or the institutions we trained in Executive Education programs. I always request participants to do benchmark research, and, in relevant situations, I invite guests from local organizations to share their experiences. In certain programs (like our Innovation in Education Services Program), we did intentionally incorporate the examination of case studies to help participants visualize what innovative services in educational settings are like.

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

Research

In-depth learning about the organization's resources and limitations and the users' needs to effectively frame the design challenge.

Data collection methods

Secondary Sources

Interviews

Observation

Netnography

Immersion

Data analysis methods

Download Your Learnings

Brand Analysis

Stakeholder Maps

Empathy Maps

User Journey Maps

Design Challenge

Design Criteria

Ideation

Conceptualizing a solution for the innovation opportunity identified through the research process.

Ideation Techniques

How Might We Questions

Structured Brainstorming

SCAMPER

Repeat-Evade-Modify

Round Robin

Mash-up

Analogy Thinking

Sketching

Co-creation

Prototyping

Making ideas tangible to help the team build, discuss, and communicate their solutions.

Types of Prototypes

Sketches and Diagrams

Storyboards

Wireframes

Mock-ups

Role-play

User Journey Maps



Service Blueprints
Business Model Canvas

Planning the Implementation

Structuring the implementation of the solution to increase the possibilities of adding value to users, stakeholders, and connected organizations.

Planning Tools
Solution Roadmap
Work Breakdown Structure
Responsibility Matrix
Project Schedule
Budgets
Innovation Adoption Roadmap

Implementation and Validation

Testing the created solution to ensure user, stakeholder, and organization satisfaction.
Partial Implementation Modalities
Feedback Sessions
Live Prototypes
Pilot Testing

Validation Techniques
1:1 Interviews
Focus Groups
Monitor and Evaluate
Analysis of the Users' Emotional Trajectory
ERICA

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

- Understand the purpose and process of Service and Strategic Design to comprehend its value within organizations.
- Research to understand the issue and its connected stakeholders, diagnose the resources and limitations of the organization that will develop and implement the solution, and identify solutions to similar challenges.
- Apply user-centered design methods and tools to the design challenge to generate user- and organization-centered solutions that are economically viable and technically feasible.
- Evaluate the proposed solution, through partial implementations and/or evaluations with stakeholders, to determine how to increase its chances of success.
- Develop an empathetic attitude with the various stakeholders that motivates the desire to build functional results that can develop emotional connections with service providers and end users.

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:

I usually incorporate the following evaluation tools in my courses:

1. Project portfolios – Portfolios include documentation of each stage of the process and its results and the individual's/team's reflection of their own learning and development.
2. Oral presentations – Teams share the details about their design challenge, process, results, and main learnings with peers and other relevant stakeholders (clients, employees, experts, etc.)
3. Peer reviews – Participants continuously review their peers' process, results, and oral presentations.
4. Mentoring sessions – As a facilitator, I meet with the teams to analyze and discuss how they're approaching their challenges and provide feedback and recommendations.
5. 1:1 sessions – As a facilitator, I meet with each individual to reflect and discuss about their personal experience in the course.
6. Self-evaluations – Participants self-reflect about their opportunities for improvement and strengths.



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

Some of the most pertinent observations included suggestions like:

- Extend the duration of the course to explore and experiment with more tools in each stage of the design process.
- Incorporate step by step guides in Spanish that will help us implement the tools outside of class.
- Add written peer- and self-evaluations after the completion of each phase of the process, so that individuals obtain constant feedback that lets them improve their performance within the team.
- Use examples specific to the types of the organizations that are participating in the course.
- Include digital formats for various types of rapid prototypes.

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

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

Escuela de Comunicación Mónica Herrera is the institution responsible for promoting and establishing Strategic and Service Design as desirable and necessary ways of thinking and doing in El Salvador.

During my time there:

- I co-led the (re)design and implementation of the only Strategic Design undergraduate program in Latin America (2013-2018).
- I educated 15 generations of Strategic Designers (Undergraduate students) on how to use innovation and design methods to answer complex and perverse challenges with solutions that are user and organization-centered, technically feasible, and economically viable.
- I coached individual and collaborative student projects, several of which have been showcased and awarded in international design venues like 50 Talentos del Encuentro BID (Madrid), Wanted Design (New York), and Global Grad Show (Dubai).
- I advised 11 undergraduate thesis projects, 7 recognized with Best Thesis Project Award and 2 with Honorable Mentions.
- I founded and led Syncros, the Strategic Design Lab at the university, from January 2013 – June 2021. In collaboration with the lab's interdisciplinary team, we published 15+ research articles on innovation-related subjects and developed 50+ tools to help diverse audiences learn how to perform research, ideation, and validation techniques.
- From 2013-2021, I academically coordinated and co-facilitated the 3 major Executive Education innovation programs and all the university's innovation consultancy services.
- Along with my colleagues, we trained in Design-Driven Innovation philosophy and methodology 650+ professionals from organizations like AFP Crecer, Applaudo Studios, Banco Agrícola, CEPA, El Diario de Hoy, Escuela Americana, FUEDEM, Fundación Gloria de Kriete, Grupo Agrisal, INSAFORP, Iglesia Cristiana Elim, LACTOLAC, Pollo Campero, Search In, Sherwin Williams, and Telefónica.
- As a result of leading the university's initiative to redesign some of its core services in response to the COVID-19 pandemic, I was promoted to Innovation Director at the university to continue developing an institution-wide innovation culture.

I have participated as a speaker in the following events:

November 2021. ASI Innovation Week. Aprendiendo a través de la experiencia de otros: Prácticas de innovación que logran mejores resultados. (El Salvador)

November 2021. 9º Encuentro BID Enseñanza y Diseño. Encauzando la experticia colectiva para sobresalir en tiempos de crisis. (Spain)

September 2021. Evento Día de la Mujer para Sherwin Williams. Mi identidad: Entre lo personal y colectivo. (El Salvador)

April 2021. Diseño desde casa. ¡Ajá! Lo que te lanza al siguiente nivel. (El Salvador)

September 2020. Evento para exalumnos Mónica Herrera. Lecciones de innovación de servicios en tiempos de cuarentena. (El Salvador)

September 2020. Las esenciales: Clases imperdibles de la Escuela. Lecciones de innovación de servicios en tiempos de cuarentena. (El Salvador)

October 2019. Conferencias/desayunos INSAFORP y Escuela de Comunicación Mónica Herrera para Gerentes y Directores. Centrarse en las personas para alcanzar la innovación en la organización. (El Salvador)

October 2019. Innovación en la formación: Impulsando oportunidades. Innovación educativa a través de la óptica estratégica del diseño. (El Salvador)



August 2019. Evento ALTHES. La innovación desde la óptica estratégica del diseño. (El Salvador)

November 2018. Semana Mónica Herrera. Innovation Test Drive: Introducción al Diseño Estratégico, 2nd edition. Talk and workshop for participants from 5 local universities. (El Salvador)

November 2017. Semana Mónica Herrera. Innovation Test Drive: Introducción al Diseño Estratégico, 1st edition. Talk and workshop for participants from 5 local universities. (El Salvador)

November 2017. Transforma: El factor humano de la innovación. Aprende, juega, crea. (El Salvador)

October 2017. 7º Encuentro BID Enseñanza y Diseño, Spain. Certificación en Diseño Estratégico: Competitividad empresarial a través de la innovación sostenible. (Spain)

September 2017. Evento AMCHAM. Introducción al Diseño Estratégico. (El Salvador)

October 2016. III Congreso Centroamericano de Comunicación. Diseño Estratégico y Diseño de Servicios: Enfoques estratégicos del diseño. (El Salvador)

August 2016. Evento para directores de colegios del Gran San Salvador. (De)construyendo los servicios: Definición y diseño. (El Salvador)

October 2014. ID Week. Dimensiones del Diseño Estratégico. Talk presented with Rodrigo Massi and Ivette Chacón. (El Salvador)

September 2014. Evento de la Asociación de Líderes del Talento Humano de El Salvador (ALTHES). Diseño Estratégico: Motor de innovación y transformación organizacional. (El Salvador)

May 2014. Evento para Alta Gerencia de múltiples organizaciones locales. Diseño Estratégico: Motor de innovación y transformación organizacional. (El Salvador)

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

Urquilla, A. (2022). Encauzando la experticia de la comunidad universitaria para sobresalir en tiempos de crisis: La experiencia de la Escuela de Comunicación Mónica Herrera. La formación en comunicación: visiones de una formación futura. Experiencias significativas, 101-131.
https://www.researchgate.net/publication/365316128_La_formacion_en_Comunicacion_visiones_de_una_formacion_futura_Experiencias_significativas/download

Urquilla, A., Massi, R., Chacón, I., Vega, J., & Quiteño, G. (2020). Herramientas de investigación de proyectos de diseño. Mónica Herrera Ediciones.
<https://monicaherrera.edu.sv/2021/wp-content/uploads/2022/07/Herramientas-de-investigación-de-proyectos-de-diseño.pdf>

Urquilla, A. & Chacón, I. (2020). Herramientas de ideación de proyectos de diseño. Mónica Herrera Ediciones.
<https://monicaherrera.edu.sv/2021/wp-content/uploads/2022/07/Herramientas-de-ideación-de-proyectos-de-diseño.pdf>

Urquilla, A. & López, P. (2019). Herramientas de evaluación de proyectos de diseño. Mónica Herrera Ediciones.
<https://monicaherrera.edu.sv/2021/wp-content/uploads/2022/07/Herramientas-de-evaluación-de-proyectos-de-diseño.pdf>

Urquilla, A., Quiteño, G., Rivera, O., & Beza, M.J. (2018). DE estudiantes PARA estudiantes. Revista Abierta, 12, 40-49.
<https://monicaherrera.edu.sv/2021/wp-content/uploads/2022/07/Revista-abierta-2018.pdf>

Urquilla, A. (2017). Diseño Estratégico y Diseño de Servicios: Enfoques estratégicos del diseño. Mónica Herrera Ediciones.
<https://monicaherrera.edu.sv/2021/wp-content/uploads/2022/07/Diseño-estratégico-y-diseño-de-servicios.-Enfoques-estratégicos-del-diseño.pdf>

Urquilla, A., Vega, J., Quiteño, G., Beza, M.J., Martínez, V. & Tusell, G. (2016). Guía de documentación de proyectos. Mónica Herrera Ediciones.
<https://monicaherrera.edu.sv/investigacion-institucional/>

Urquilla, A. (2016). (De)construyendo los servicios: Definición y diseño. Mónica Herrera Ediciones.

Urquilla, A. (2016, enero-febrero). Diseño de Servicios: Una tendencia que viene con fuerzas. Revista Estrategia & Negocios, 193.
<https://www.estrategiaynegocios.net/lasclavesdeldia/diseño-de-servicios-una-tendencia-que-viene-con-fuerzas-LAEN922494>

Urquilla, A. (2013). Diseño Estratégico: Motor de innovación y transformación organizacional. Mónica Herrera Ediciones.



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<https://monicaherrera.edu.sv/2021/wp-content/uploads/2022/07/Diseño-estratégico.-Motor-de-innovación-y-transformación-organizacional.pdf>

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