

## Self-assessment by Bethany Polentz

SUBMITTED ON 05 DEC 2024



### A summary about me:

I am an in-house Service Designer/User Experience Strategy consultant, responsible for evangelization and application of service design and design-thinking principles to products, projects and processes across customer-facing initiatives, as well as to internal projects and partnerships. I design and facilitate workshops with product and partner teams, to foster stakeholder alignment, explore innovative design solutions and prototype and test new designs. I am a strong communicator in managing internal and external client expectations in delivery of design services and artifacts, skilled in managing cross-functional teams.

### I currently work as a/at:

Service Designer, Wells Fargo: <https://www.wellsfargo.com/>

### My LinkedIn profile:

<https://www.linkedin.com/in/bethany-polentz/>

### My social media channels:

At present, I utilize social media for just that- socializing. I recently left Twitter (X), and use Instagram for posting personal photos, same with Facebook. I do not wish to share my account pages/handles for these sites at this time.

### My educational background:

- Learned on the job, augmenting my knowledge with SDN Touchpoint articles, TISSD, books by acclaimed SD practitioners, and put the cherry on top with the SDN Masterclass series 2024
- Completed in-house Design Thinking and Facilitation training via a Wells Fargo Wholesale UxR team "Train the Trainer"
- Completed LUMA Practitioner certification, ~2018
- Completed Introduction to Journey Mapping, Kerry Bodine, ~2016
- B.A. English via University of Georgia

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

As a Service Designer in a traditional finance organization (without an established Service Design practice), we are working to establish best practices and teach partners how to use SD tools- personas, journey maps, and blueprints. We have a proposed toolkit that we bring to each engagement (but we customize as needed). Journey maps are popular with our constituents, and it has opened doors in helping us help our partners shift consider Systems Thinking and move away from our organization's old, silo'd approaches.

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



### design:

I turn to Touchpoint, This is Service Design Thinking (and the companion, TISDD), and various online blogs (Practical by Design, Medium articles, IDEO blog posts- it really varies). I am constantly referring to these various sources to give strength to the language I use with partners, in order to help clearly articulate the "why?" of our approach.

### I have X years of working experience in service design:

8

### 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

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

5

### These are the service design projects I have successfully delivered:

P1: Jan-Jun 2017, Wells Fargo, SBA Lending. Outcome: Stakeholder & client insights, current state journey map, target state journey map, prototype & testing to crystallize concepts for roadmap. Impact: Identified pain points and short-term changes to address immediate pain, built future-state vision that led to new multi-year program.

P2: Oct 2018- Oct 2020, Wells Fargo, Wholesale Lending Transformation. Outcome: Current state journey maps for 5 of 7 high priority lines of business, built blueprints for same, identified roadmap priorities for Lending enhancements across now, next, and beyond implementation horizons. Impact: Led to creation of standing dedicated Lending workstream and later initiative to streamline backend systems involved in Lending journey and sparked dedicated Onboarding initiative.

P3: Dec 2020- Jun 2023, Wells Fargo, Onboarding (later became Manage Relationship Journey). Outcome: Stakeholder interviews, client interviews, Persona creation & curation, current state mapping for key segment personas and target state blueprints. Embedded service design strategist on the journey and onboarded multiple product managers, conducted workshops to concept and consulted through implementation of roadmapped items. Impact: Established Service Design as a practice within Manage Relationship journey.

P4: Jul 2023- Feb 2024, Wells Fargo, Capital Markets. Outcome: Stakeholder interviews, co-create and facilitation of alignment and ideation workshop; development and internal testing of concepts, project outcome roadshow. Impact: Introduction of Service Design to Capital Markets journey, influence to multi-year roadmap.

P5: Jul- Dec 2024, Wells Fargo Dev Ecosystem. Outcome: Stakeholder insights, curated Personas and eco-system maps, current state journey maps across multiple scenarios, pain point identification, stakeholder alignment & concepting workshop, prototyping & testing. Impact: Validated current roadmap direction and influenced North Star discussions with creation of 22 new concepts. Ongoing socialization of outputs to senior stakeholders, product partners, and internal SD community.

Other:

- Countless workshops across multiple lines of business within Wells Fargo
- Contributor to 2018 Design At Business sprint with San Francisco Unified School District to concept ways for the school system to provide healthier options and choice to students in elementary and high schools, for better nutrition outcomes.
- Voltage Control San Francisco Regional Lead- Sept 2024 to present- co-organizing monthly Practice Playground facilitation labs
- Multiple smaller/partial stack Service Design activities across Wholesale banking digital offerings

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

2

### My philosophy as a trainer is:



I've always been a "big picture" thinker so when conducting trainings/workshops I encourage participants to consider factors outside of the immediate view- I find the famous iceberg imagery always helps open minds and encourages broader perspectives.

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

Various dates, 1-2 hour sessions, topic usually is on Service Design in general or Journey Mapping, in particular. Client is internal partners/teammates, ~10 participants at a time. These are just in-house "brown bag" type of sessions, usually in relation to an active project, to bring stakeholders up to speed with potential project activities.

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

English

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

n/a

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

- Definition of service design
- Designing and conducting co-creation workshops
- Creativity and ideation processes
- Facilitation skills for service design

**My training participants typically have the following level of experience:**

- Novice (new to service design)

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

n/a

**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 Masterclass
- SDN Chapter Activity

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

Participant/attendee to SDN SF Chapter events; Regional Lead for Voltage Control SF Bay Area Facilitation Lab

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