

## ACCREDITED MASTER TRAINER

### Self-assessment by Matthew Oliphant

SUBMITTED ON 27 APR 2018



#### My educational background is:

I have a degree in Creative Writing and started my professional career as a Technical Writer. (Because you can't pay rent with a poem. More than once. Apparently.) I got tired of writing Help and Manuals for poorly designed processes and software and moved into Service Design in 1999.

Of course, it wasn't called Service Design back then. Certainly SD existed, but in the US, at the time, even UX wasn't a widely used job title. While my job title at the time was Interface Design Specialist (IDS). Terrible title. The Interface Design Specialist team was about 30 people or so. We were farmed out to projects. During my time there we didn't tend to focus on a single product. We also defined Interface as "something between a thing and the person using the thing." In my time there, I did a lot of digital work, but I also did a lot of other things like: physical product testing, redesigning the customer experience (and employee experience) in a retail setting, and redesigning processes.

We weren't limited in our thinking of what constituted a user's experience. I was lucky enough to work for an organization that took training very seriously. I got to learn from the people who wrote the books about UX before it was called UX, and did UX back when it was more than just digital. It really was SD work, but after a few years UX became the acronym of record. But UX has changed and now that SD is more a thing here in the US (I first heard the term only a few years ago), that's what I tell people I do. But UX still has to be a part of the conversation for US clients because they don't know what SD is.

#### I currently work at/as a:

Service Design Consultant.

[studiovo.co](http://studiovo.co)

#### I have X years of experience applying service design in projects in order to improve or innovate service offerings for my clients:

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#### I have particular experience in the following service sectors:

My work has impacted healthcare, insurance, banking, accounting, CRM, fundraising, marketing, e-commerce, business processing, education, transportation, engineering, SaaS, B2B, B2C, and the somewhat rare C2B.

#### I have successfully delivered the following service design projects for my clients:

Client: AllMed



Duration: March 2018 to Ongoing

Define the entire system of work for AllMed's employees to determine opportunities for efficiency.

Outcome: Research findings helped AllMed understand where the gaps were in aspects of their system, both digital- and personnel-related. While the work so far has been internally focused, further projects will branch out to better understand AllMed's client inputs and needs.

Client: Edify Edu

Duration: Sept 2017

Desc: Discovery on a product to support the company's services.

Outcome: The project helped Edify's leadership to set aside the product idea as it was not something which was core to their business, or their clients. The work saved the company several hundred thousand dollars in product design/development costs. It's some of the more fun work I get to do: shut down ideas before they get a chance to cause harm and waste.

Client: Mayo Clinic

Duration: Sept to Oct 2016

Desc: Understand the needs of people who are post-organ transplant.

Outcome: Research findings helped doctors, administrators, and Mayo's web team get a better understanding of their patients needs which lead to changes on the web site as well as how information was shared with patients during in-person treatment.

Client: Mayo Clinic

Duration: May to June 2016

Desc: Understand how people who suffer from migraines deal with the pain, how it affects their lives, how they handle medication, and how they interact with the different aspects of Mayo's organization online and in-person.

Outcome: Research findings helped doctors, administrators, and Mayo's web team get a better understanding of their patients needs which lead to changes on the web site as well as how information was shared with patients during in-person treatment. Changes were also made to in-person visits (lowering lights, providing dark glasses and noise-cancelling headphones, etc).

Client: Boyle Transportation

Duration: July to August 2012

Desc: Define the entire system of work for Boyle Transportation Specialists to determine opportunities for efficiency.

Outcome: Research findings helped Boyle understand where the gaps were in aspects of their system, both digital- and personnel-related. Boyle leadership was focused on how to make their digital system do more and better work, which was part of the deliverable, but the work I did also underscored how important it was for their employees to retain their feelings of being empowered problem-solvers which wasn't part of the leadership's attention until this project.

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

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I have participated as a speaker in the following events:

Portland Startup Week (2018)

Talk slides (no video available): <https://speakerdeck.com/matto/cromulent-research-methods>

UX Hong Kong (2018)

Transcript of talk (no video available): <https://medium.com/@matto/make-with-love-58ea4d16a427>

Workshop slides (no video available): <https://speakerdeck.com/matto/stand-alone-discovery-projects>

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

I cross-post everything from my personal and company sites to Medium, so that's probably the easiest place to look:



<https://medium.com/@matto/latest>

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

Everything has to be looked at in the smallest and widest context possible; both how "the thing" fits into an entire ecosystem as well as how its own end-to-end aspects function.

Humans are at the center of everything. Technology, process, environment, etc, all come second to that. There's no such thing as leading with a solution, though I am not against leading with an hypothesis.

The idea that digital can solve everything is ridiculous. And yet, we live in that world. Service Design is an antidote to that.

I'll leave it at that, otherwise I'll wax entirely too philosophical.

### My philosophy as a trainer/coach is:

Everyone brings something to the table. While I know a lot, I consciously don't consider myself an expert because I know great ideas, insights, and perspectives come from everyone, even people new to SD. Successful SD training (any training really) goes to where the participants currently are and walks/nudges them gently to where they need to be. (Good strategy for client work, too.)

### I have provided service design training sessions for X years:

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### Here is a list of all service design training sessions and/or other educational experiences I've facilitated within the last year:

Date: April 2018

Title: Design Thinking in Higher Education

Client: Design Week Portland

Number of Participants: 45

Duration: 3 hours

Link: <https://www.designweekportland.com/events/integrating-design-thinking-mindsets-in-higher-education>

Date: April 2018

Title: Get Out and Talk to People

Client: Portland Startup Week

Number of Participants: 35

Duration: 2 hours

Link: <http://portlandstartupweek2018.sched.com/event/EL65/get-out-and-talk-to-people>

Date: March 2018

Title: Stand-alone Discovery Projects

Client: UX Hong Kong

Number of Participants: 61

Duration: 4 hours

Link: <http://uxhongkong.com/#program-day2>

Several SD workshops as part of the local SD meetup where we work with local organizations to teach Blueprinting to the organization and community members.

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



English

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

US, Hong Kong, London (upcoming)

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

- Leadership/management of service design projects
- Facilitation skills for service design
- Working with complex service systems
- Exploration of systems
- Organisational development
- Service design for cultural change
- Creativity and ideation processes
- Change management
- Prototyping of services
- Visualisation techniques
- Design and conduct of co-creation workshops
- Differentiation between service design, service marketing, design thinking, service branding
- Building in-house service design capabilities
- User research/deep customer insights

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

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

**These are the most relevant resources I base my work on and I recommend to participants:**

User and Task Analysis for Interface Design by Hakos & Redish. The title says Interface Design, but there's so much non-digital/fundamental goodness in it, I've recommended it since I first came across it in 2000.

Human Performance Engineering: A Guide for Systems Designers by Bailey. Excellent book on the fundamentals of Human Factors. It's totally old school, but it's also a text book so there's a lot to glean from it.

This Is Service Design Thinking/Doing are ones I usually recommend to people new to SD. I never recommend the Rosenfeld Media book on SD. Entirely too snobby and the font is way too small.

Mapping Experiences by Kalbach is pretty decent as well.

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

How to:

- \* interview people
- \* map out systems and experiences
- \* identify, understand, and limit hidden agendas
- \* synthesize findings into something actionable
- \* prototype for research and for building

I tend to not focus too much on tools and deliverables as I find those more ancillary to the real work of understanding systems. I get that some of those tools and deliverables can help with that, but I'm more interested in the fundamentals that necessarily come before that. In my thinking, the tools and deliverables that get you the quickest to the highest level of confidence are best.



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

My favorite use cases are my 4 opportunities to shut down businesses and have the owners thank me for it.

I tend not to use case studies from other people/companies as it's difficult to speak to them. Certainly, I note there are plenty of case studies available on the SDN site and via searching.

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

I ask people. I've used surveys and find them less than useful. Certainly I never ask for a number. I ask for some narrative feedback. The best is when we take time to do Plus/Delta or Stop, Start, Continue as a group. All that is to say, I haven't found a good way to elicit quality, actionable feedback on a regular basis. If you have ideas, please let me know!

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

If it's their first or close-to-first introduction to anything I am teaching, I expect them to be able to muddle through a project of their own. Ideally, these workshops would be on practical things, but that usually isn't an option. So you have to hope they can take what they learned in the workshop and translate that into practical work.

If they aren't new to it, then I expect participants to be able to refine their current methods without much issue.

Anyone who expects people new to this to be able to do a workshop and jump in back at work and do it well... they are not setting realistic expectations.

### I always ask for feedback on my offerings and I systematically evaluate and improve. Examples of some feedback that led to improvements:

The primary bit of feedback I've received is "there's too much." I think there is a tendency to try to cram a lot into training, especially if you don't have a lot of time. I've adjusted so that I reduce what we try to accomplish; scope the training to the time and hope to get people to do more workshops. For conferences this is difficult to do.

Even in my recent Discovery workshop I had too much content. But the feedback was positive, so it doesn't seem like attendees missed the content we didn't get to. But I wish we had. More fodder for scoping down. But you never know how much hand-holding (in a positive way) an audience is going to need.

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