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Checklists

From the book: This is Service Design Methods: A Companion to This Is Service Design Doing
Book by Marc Stickdorn, Markus Edgar Hormess, Adam Lawrence, Jakob Schneider

Use at least one method from each of the following categories in your research

Research

DESK RESEARCH

- Preparatory Research**
- Secondary Research**
- Define the research question or topic
- Identify sources.
- Evaluate the reliability of sources
- Conduct a search.
- Dig deeper into the potential sources
- Summarize and visualize
- Prioritize actions
- Develop an implementation plan

SELF-ETHNOGRAPHIC APPROACH

- Autoethnography**
- Online Ethnography**
- Define the specific research question
- Plan and prepare
- Conduct the research
- Followup

PARTICIPANT APPROACH

- Participant Observation**
- Contextual Interview**
- In-Depth Interview**
- Focus Groups**
- Define specific research questions.
- Identify participants
- Plan and prepare
- Conduct the approach.
- Followup

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NON-PARTICIPANT APPROACH

- Non-Participant Observation**
- Mobile Ethnography**
- Cultural Probes**
- Specify research questions.
- Plan and prepare
- Conduct observations
- Followup

CO-CREATIVE WORKSHOP

- Co-creating Personas**
- Co-creating journey maps**
- Co-creating system maps**
- Plan and prepare
- Welcome and split into smaller groups
- Create personas or maps
- Discuss and merge
- Visualize and validate
- Iterate
- Followup

METHODS OF DATA VISUALIZATION, SYNTHESIS, AND ANALYSIS

- Building a research wall**
- Creating personas**
- Mapping journeys**
- Mapping systems**
- Developing key insights**
- Generating jobs-to-be-done insights**
- Writing user stories**
- Compiling research reports**
- Prepare and print out data
- Define actors, scale and scope
- Visualize research wall personas, maps, insights
- Cluster, merge and prioritize
- Link the result to data
- Find gaps and Iterate
- Followup

Ideation Methods

PRE-IDEATION

- Slicing the elephant and splitting the ideation challenge**
- Ideas from future-state journey mapping**
- Ideas from future-state system mapping**
- “How might we...?” trigger questions from insights and user stories**

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- Define and invite participants
- Prepare and warm-up the participants
- Identify the way to bring previous knowledge into the room
- Run the method.
- Ideate
- Prioritize and select.
- Examine and cluster.
- Followup

GENERATING MANY IDEAS

- Brainstorming**
- Brainwriting**
- 10 plus 10**
- Look at your starting point for ideation
- Choose the right method
- Identify the way to bring previous knowledge into the room
- Define and invite participants
- Share information
- Show the key question
- Run a warm-up
- Run the method
- Select ideas

ADDING DEPTH AND DIVERSITY

- Bodystorming**
- Using cards and checklists**
- Ideation based on analogies and association**
- Look at your starting point for ideation
- Choose the right method
- Define and invite participants
- Warm-up
- Run the method
- Reflect on the ideas
- Decide on the next idea to repeat

UNDERSTANDING, CLUSTERING, AND RANKING OPTIONS

- Octopus clustering**
- Benny Hill sorting**
- Idea portfolio**
- Decision matrix**
- Choose the right method
- Define and invite participants
- Explain and run the method
- Cluster, merge and select
- Decide on the next idea to repeat

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REDUCING OPTIONS

- Quick voting methods**
 - Dot voting**
 - Nose-picking**
 - Barometers**
- Physical commitment**
 - Floor Gallery**
 - Corralling**
- Choose the right method
- Define and invite participants
- Find a starting point
- Run the method
- Cluster the results
- Decide on the next idea to repeat

Prototyping Methods

PROTOTYPING SERVICE PROCESSES AND EXPERIENCES

- Investigative rehearsal**
- Subtext**
- Desktop walkthrough**
- Decide or reflect on research questions
- Find a starting point
- Create a safe space
- Set up teams, room, and initial story
- Introduce the method
- Run the method
- Decide on the next idea to repeat
- Document and Iterate

PROTOTYPING PHYSICAL OBJECTS AND ENVIRONMENTS

- Cardboard prototyping**
- Choose a user
- Review the scope and clarify prototyping questions
- Build the necessary parts
- Assign roles and prepare
- Test the prototype
- Keep a list of bugs, insights, ideas and review issues
- Revise
- Decide on the next task and iterate
- Document

PROTOTYPING DIGITAL ARTIFACTS AND SOFTWARE

- Rehearsing digital services**
- Paper prototyping**

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- Interactive click modeling**
- Wireframing**
- Choose a method
- Decide or reflect on purpose or questions
- Create a safe space
- Prepare
- Find a starting point
- Run the method
- Digitize the experience
- Keep a list of bugs, insights, ideas and review issues
- Decide on the next scene and iterate
- Document

PROTOTYPING ECOSYSTEMS AND BUSINESS VALUE

- Service advertisements**
- Desktop system mapping (Business Origami)**
- Business Model Canvas**
- Choose a method
- Choose participants
- Review scope and questions
- Prepare space and materials
- Define key features
- Run the method
- Keep a bug list/idea sheet
- Feedback
- Decide on alternatives, iterate and refine
- Document

GENERAL METHODS

- Sketching**
- Mood boards**
- Wizard of Oz approaches**
- Choose a method
- Review the scope and clarify prototyping questions
- Choose participants
- Prepare space and materials
- Run the method
- Present and Feedback
- Keep a bug list/idea sheet
- Revise, iterate
- Document

FACILITATION METHODS

- Three-brain warm-up**
- Color-chain warm-up**

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- ❑ **“Yes, and...” warm-up**
- ❑ Choose a method
- ❑ Choose participants
- ❑ Put them into groups
- ❑ Run the activity
- ❑ Debrief the warm-up

- ❑ **Red and green feedback**
- ❑ Give the presentation or proposal
- ❑ Audience ask to understand
- ❑ Green feedback, what they liked
- ❑ Red feedback, what they worry about
- ❑ Say “Thank you”.

About Flexiana

We help companies improve and build digital services - **We are The Service Builders.** We provide quality and professional full-cycle applications, web applications, mobile applications and custom software. We specialize in solving real problems and using opportunities to increase customer satisfaction and gain new customer groups, from idea to long-term cooperation. Drive and dedication have ensured Flexiana has delivered true value to business since 2016. Our values are Craftsmanship, Transparency, Autonomy, Diversity, Remote Work and Agility.

To deliver consistently, we have lots of things, for example, checklists like these ones. To deliver the best practices, we read, we process information, we discuss and share and teach. And to improve continuously, learning, teaching, processing and building knowledge is an integral part of our operations.