Considerations when designing or improving a service process

While working on my car last weekend, as I was contorted at an odd angle with my arm stuck in a small space between the engine and firewall, trying to replace the spark plugs, I started thinking about automotive engineering and design. Specifically, I was wondering who designs car engines in a way that you cannot easily work on them, can’t get your hand into spaces while holding a tool, and cannot move your hand enough to unscrew a part. I know that they have to fit the engine into the available space dictated by the car’s design, but it is getting very difficult for owners to maintain them - and for the mechanics who charge a lot of money to make repairs.

The thing is, like car designers and engineers, when we design or improve services for our customers, we often focus on the result of the service rather than the customer’s experience as they go through the process. To truly provide a customer-centric service, we must consider both results and customer experience, and work to find a balance. When designing a service process, do not assume you know best, do not let the operating environment force you to develop a poor service, and take the time to test the process before rolling it out.

Don’t assume you know best

When you are designing or fixing a process, you cannot just assume that you know what is best for your customers. Years ago, I worked for an organization where the leadership felt they knew what the customers wanted, even better than the customers themselves. The leaders relied on their many years of industry experience and their personal interests to provide the products and services the company offered. Unfortunately, this was a very narrow view, and as customer’s needs and tastes changed, these assumptions backfired. The organization faltered, fell behind the competition, and has since been struggling to stay afloat.

Rather than making assumptions, I would recommend the following:

1. Talk with your customers to learn about their needs for, and their expectations of the services you provide. Take the time to collect information from your customers, observe how they interact with your front-line staff and technology, how they use your services and what they do with the results you provide.

2. Benchmark your services against other organizations that provide the same or very similar services, or those that are top service providers. Learning from other
people can be a short-cut to helping you improve without having to do all of the work from scratch, and suffer through mistakes. When you look at other organizations, identify their best practices, the problems they have encountered, and lessons they learned. Just keep in mind that you will rarely be able to take these best practices from an outside organization and simply transplant them into your own. You will need to modify what you have learned to fit your organizational culture, systems, technology, and capabilities.

3. Invite your customers to help you design your services. Having an end-user involved in the design or improvement discussions from the start will help you better understand their needs and reduce the time it takes to produce an excellent service process. Just remember that a single person is not representative of all of your customers. You will need to involve a number of people to get a good sense of all of your customers’ needs.

4. Question everything about the process. Essentially this is being your own devil’s advocate. Look at the service process and ask questions like:

- Who are the customers we are trying to serve?
- Why are we providing this service in the first place? Is this what our customers want?
- Are we providing the right service to meet customers' needs? Do we need to change anything to better meet their needs?
- What do customers want from this service? How are they using it? What benefits are they expecting to receive?
- Are we providing services in the most efficient way? Is there a better, more customer-friendly way to support our customers?
- What technologies can we use to automate the process?
- What training can we provide to our staff?
- What could go wrong during this service interaction? How can we prevent these things from occurring? What is our service recovery plan?

Do not let the environment force you to design a poor service

One of the easiest excuses to make for poor service design is that the process has to be created in a certain way because of organizational limitations. These can be factors like policies, a lack of staff, inadequate technology, or leadership expectations. Regardless of the reason, poor service is poor service; and organizations must make
every effort to remove or minimize barriers to excellence. Here are some recommendations for addressing barriers.

- Create a business case. If policies are preventing the organization from designing and providing excellent service, or if leadership expectations are in conflict with meeting customer needs, you may need to present a business case for changing them. The business case should describe the issues that are being encountered in the service process, its impact on customers, the root causes of the problem, and the resulting operational impacts and financial costs. It should also include recommendations addressing the issue.

- Find other resourcing options. If resources are an issue, there are a couple of things you can do to address the constraint. First, you can build a business case outlining the need for additional resources and present it to leadership. This may not always be the best solution, as budgets just may not allow for additional hiring. Second, you can work to automate as much of the process as possible. This approach can help reduce the overall need for staff and other resources. Third, you can work with other areas of the organization to identify opportunities for sharing resources to augment what you have. Don’t forget that this is a two-way street, so you will be expected to share what you have with the other areas as well.

- Communicate with your customers. If you are unable to remove or minimize constraints, make sure you are communicating with your customers, setting realistic expectations with them, and providing them with options when possible. This will not solve the problem, but it will provide them with realistic expectations for the level of service you can provide early in the interaction.

**Test the service process**

If the customer cannot navigate the process, or if the process is not capable of meeting the customers’ needs, then they cannot get the benefit of the services you provide. For this reason, when you design a new process or improve an existing one, you must carefully test it from the customers’ point of view to make sure it works properly.

Testing should be done by people who are experts, and by people who have the same level of knowledge, skills, and understanding of the process as your actual customers. The experts will be able to see how well the process works from a technical standpoint, but they will also have an advantage that your regular customers will not. Experts will most likely have an easier time getting around problems in the process than your customers. For this reason, they are likely to underestimate problems that the customers will encounter, or overestimate the customers’ ability to self-solve problems.
within the process. This is where testing by non-experts will be helpful. The non-expert feedback will give you the most realistic view of the potential customer experience. They can identify what works well, where customers may get stuck in the process, or where there are opportunities for improving the customer experience.

Additionally, when testing a newly designed or improved process, make sure you stress test it. This means simulating the maximum workload that the process will need to be capable of supporting. The testing will help you to ensure that the service you provide will be able to handle the highest customer demand that you expect to encounter, and still allow for unexpected variation in demand and future growth.

**After you have launched the service process**

One last thing to consider is that just designing or improving a process is not the end of the road. After you have completed the process and moved it into active use, you need to check back and make sure the process is doing what it is supposed to, that customers’ needs have not changed, and that there are no new customer groups that must be accommodated. It is also a good idea to watch for trends and identify potential issues so that you can address them before the customers experience any problems.

Keeping these things in mind will allow you to design a process that makes services better for customers, rather than making the experience harder for them. The idea of a service is to lift the customers’ burden and meet their needs in a way that makes their interactions easier and their lives better. Please make sure the work you do is not engineering a harder process for your customers to navigate. As always, I welcome your questions and feedback. You can email me at clayton.taylor@asu.edu.

**About the author:**

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