# HOW TO DEVELOP AND CONDUCT A SERVICE ENACTMENT

A service enactment is a tool used to simulate and test an end-to-end service experience, either from the perspective of the customer or the organisation. The enactment serves as a play of sorts, allowing a virtual walkthrough of the defined service interaction.





## Why enact a service?

Planning and acting out the steps of the service journey with actual participants helps to expose any hidden complications, missed steps or needed revisions as well as validate the defined current flow and popular concepts.

An enactment makes evident the various pathways through an experience that different participants may take. Trends will emerge along with any commonalities and/or differences across profile types. Participants will be encouraged to share their own personal stories and experiences, along with insights and ideas, which contribute greatly to painting the current service picture and helping to define the ideal customer experience.

## How should it be done?

Developing and conducting a service enactment should be an iterative process. Depending on how the enactment is structured, common findings can be quickly integrated into the enactment in order to immediately test new or different concepts. Larger and/or fundamental changes can also be integrated during a dedicated iteration time allocated between sets of enactment sessions.

### ENACTMENTS ARE GOOD TOOLS FOR

- Verifying and/or editing a proposed customer journey flow in a "life-like" environment.
- Discovering and/or validating trends, especially across participant profiles.
- Gathering stories, current painpoints, new ideas and feedback.

### ENACTMENTS ARE NOT TOOLS FOR

- Planning the initial end-to-end service journey.
- Testing or defining the details of all touchpoint channels.
- Researching user profiles or personas.

## TIPS

- Each session will most likely be conducted with one participant at a time.
- Consider how long each enactment will take and make sure to allow time in between sessions to re-group.
- Remember that the length of the sessions will vary depending on the complexity of the interactions and the amount of steps. A rough estimate is 1.5 hours per session with 30 minutes in between. It's always preferable to let participants leave early rather than need to rush or cut short sessions.
- Consider how you want to structure test days, for example, all participants from one profile in one go, a mix each day, etc. Note that a flexible mix will be easier and faster to recruit for.
- Consider staggering session time slots across test days as some profiles, for example those with a typical 9-5 job, will need to attend after work hours.
- Provide the recruiter with an information sheet that includes contact numbers, directions, parking information, public transport options and any other logistics. These should be distributed to participants and will help reduce complications and late arrivals.
- Make sure the recruiter lets potential participants know that they will be recorded but only for internal research reasons.

## STEP 1: RECRUIT

In order to conduct an enactment, you will need participants that represent your key profiles or personas, and these participants need to be recruited. Make sure to start the process early in order to allow enough time for the best matches to be found. A comfortable timeline is usually 10 working days, however this may vary depending on complexity, numbers, choice of recruiter and other factors.

### TO DO

1. Contact a recruiter early in the process (if working with one) to provide them with a high-level overview of the upcoming recruiting request
2. Determine the key participant profiles, either from previous research, profiles, personas or develop your own
3. Develop a recruitment brief. Factors to consider:
   - Percentage of male and female
   - Age ranges
   - Proficiency in area of work
   - Role
   - Location
   - Any other variables pertinent to the research, for example, technical/Internet proficiency, decision-making power or length of time with their current provider
4. Submit recruitment brief to recruiter along with any additional details or requests.



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## STEP 2: MAP STEPS & PICK CHANNELS

The mapping stage of the enactment is critical to determining the key areas that need to be tested and ensuring that there is a cohesive flow throughout the experience.

While it is not practical to represent every touchpoint for each step (unless you've got a lot of time!), make sure that you cover the most likely for your participant profiles. For example, if a customer is reaching out for help with a fault, what are the most common methods he will use (keeping in mind your customer profiles) – calling, going into a store, chatting online, etc.?

### TO DO

1. Map out the chronological steps of the end-to-end journey. Represent each step with a post-it as this will allow flexibility to easily re-order, add, delete or edit.
2. Plan for two touchpoint options for each step, for example, the step "Conduct Needs Analysis" might have the channels of online and telephone. You may find steps where only one channel is needed, or others may require three.
3. Go through each step and allocate the touchpoint channels, using additional post-its. Use different colours to represent different channel types as this will assist with future coordination.
4. Run through the end-to-end steps again to verify that the selected touchpoints are comprehensive. Consider the logical and most likely set of steps that your profiles will take.
5. Coordinate all the steps and touchpoint channels into a spreadsheet file.
6. Within the file, begin adding any additional notations on what needs to be conveyed at a step/touchpoint. For example, the Customer Service Representative on the telephone "needs to introduce the concept of Try Before You Buy."

## TIPS

- Idea is not to replicate every touchpoint in every step of the journey.
- Remember that the purpose of the enactment is to validate the end-to-end journey, and not flush out each touchpoint in detail.
- Consider your user types and make the best attempt to cover the most likely options. Additional touchpoints for a particular step can always be added later if needed.
- Sometimes the most likely customer journey will include a variety of touchpoint types. For example, Kim went online to do research and then in to the store to ask some additional questions, she then considered her options and called up online to place an order and after ordering online she received an email with confirmation.
- It's good to ensure channels are present that represent the different mindsets or streams of the profiles, for example, an in-store experience and an online/phone experience.
- Make sure that open questions or challenging areas are included. The goal is to sort through these with the testing. Don't worry if it's not completely clear at this point. Intentionally include the hard options if they are relevant and will benefit from further investigation.

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## TIPS

- Create a loose sketch of the different environments to help envision the props or materials needed and the general room set-up.
- There may be several props created for each step and it can get quite complicated. Make sure you put in place a coding system that helps keep things organised yet flexible.
- As props are added, edited or deleted, make sure to stick to the system.
- Make sure that common elements across the props are consistent, for example naming, terminology, look & feel of similar prop types, etc. Participants can often be distracted from the flow by inconsistencies.
- Chose one character name that can work for either male or female (such as Sam Smith) and inform your participant that that's their name for the enactment. This eliminates confusions and the need to replicate documents.
- Try to keep a consistent level of low-fidelity production (or if doing so- high-fidelity) in order to provide a sense of consistency throughout the enactment.


## STEP 3: DEVELOP PROPS & MATERIALS

Now that the steps are mapped and the channels selected, review each of the touchpoints and determine what materials will need to be mocked-up in order to facilitate the engagement. For example, during a "Receive First Bill" step, is there a paper bill needed? What about an email or PDF version? Is there an accompanying instruction sheet? In order to facilitate a smooth enactment, representative props should be developed. These props should be low-fidelity – able to convey the essence of the object without having to be exact or polished.

After determining the needed props, next determine which environments will need to be created for the enactments. For example, do you need a store environment, a home office environment, a call-centre environment, etc.? Again, props should be developed in order to loosely yet clearly convey the virtual environment.

- A variety of props and materials will need to be developed in order for your users to get a sense of the actual flow through the journey.
- For example, if a website will be used, a mock-up laptop might display rough wireframes simulating related interfaces.
- From each of the flows mapped previously, determine materials needed.
- Best to coordinate these in some sort of file such as Excel in order to keep track of production and edits, especially if multiple team members are working on simultaneously.

### TO DO

1. Within the same spreadsheet file, note which props are needed within a step/touchpoint. Keep in mind all your participant types and how that translates into artifacts. For example, a pensioner might require a paper bill, a general customer may want a paper bill along with an emailed PDF and a techie might expect a text reminder to check their online account.
2. It's best to give each prop a code in order to keep track, for example, 1A (Step 1, channel A).
3. Develop props. Be aware that some props can be used across several steps/touchpoints with small edits.
4. Continue adding additional notations on what needs to be conveyed at a step/touchpoint, such as, important concepts, script notes, etc.

## STEP 4: ALLOCATE ROLES & STUDY MATERIAL

Now that the props and artifacts have been developed, determine who will play which roles within the enactment. Sessions should ultimately be facilitated by one "ringmaster". The ringmaster introduces the participant to the enactment, provides some background and "escorts" the participant through the journey. The ringmaster will pause to ask questions where relevant and ensure that there's a smooth transition from step-to-step, as well as distribute prop materials where are relevant. The additional "cast members" will play the roles of those encountered in the various touchpoints, such as, a Customer Service Representative on the phone or in a store.

### TO DO

1. Determine the various roles and the amount of interaction each requires.
2. Allocate the roles to cast members.
3. Each cast member should review the file and study the touchpoints that are relevant to them. For example, the telephone CSR should review all the telephone touchpoints, develop the scripts, coordinate the props, etc.
4. The ringmaster should have a handle on the entire journey in order to facilitate smoothly and add additional information when needed. The ringmaster should consider how they will kick-off the enactment for a participant style along with how they can transition from one step/touchpoint to the next.

## TIPS

- A variety of actors will be needed to play the various roles of the enactment, for example, telephone representative, in-store representative, installer, etc.
- Reduce the confusion and need to run-around by giving one role to one actor.
- In cases where there are too few actors, or very simple roles, coordinate the doubling up of roles so that there's an even allocation among actors.
- May decide that there is one prop distributor whose main role is distributing the various artifacts encountered or received along the way, such as letters, emails, equipment, purchases, etc.

## STEP 5: DEVELOP PROPS & MATERIALS

Now it's time to get into it – jump in and start practicing! Running through the enactment will help to point out areas that need revision or where gaps remain.

### TO DO

1. Coordinate props and set up a loose replica of the different environments.
2. Recruit someone to act as a participant. Make sure they're not familiar with the material.
3. Ringmaster begins the enactment session as would happen on the day, with an introduction and high-level explanation. Take note of the start time to get a rough estimate of how long the session takes.
4. Run through the enactment, with everyone playing their roles. Feel free to take pauses in which to ask questions and work out any kinks.
5. Note where changes need to be made (to scripts, props, procedures, etc.) in order to make revisions once it's done.
6. Based on what's discovered, revise the steps and materials to suit.
7. Run through another trial enactment with a different participant to gain more practice.

## TIPS

- Don't be afraid to start, even if things aren't yet perfected.
- Make sure to make changes consistently across materials, for example, if you change the name of a product on one prop, change it across them all.

### TIPS

- Consider the flow of the enactment when setting up the environment, for example, face the participant towards observers or shield a telephone Customer Service Representative behind a screen.
- Make sure to collect participant's mobile numbers beforehand in case of late comers or no-shows.

## STEP 6: PREPARE FOR SESSIONS

Coordinate the logistics of running the enactment to ensure that things go smoothly and the important insights and research data is captured.

### TO DO

1. Invite key stakeholders and interested parties to watch the enactments. Observation would need to be out-of-sight, therefore in another room or via a video stream.
2. Collect and coordinate incentive money for participants into individual envelopes.
3. Set up recording equipment.
4. Liase with the recruiter for the list of who's attending on what day at what time. Each participant should be marked with their profile type.
5. Develop any needed sign-in and Non Disclosure Agreement (NDA) forms for each day.
6. Develop note taking sheets that encourage team members and observers to track each participant's journey and add notes.
7. Set up the physical environment the day before the enactments begin.

### TIPS

- Ringleader should keep track of the time to ensure the enactment stays on track.
- Ringleader should step in to spark conversation, coax answers, offer assistance and cut short any prolonged dialogue when necessary.
- Ringleader should be careful not to bias participant's responses by leading them down one path or another. The goal is to encourage responses without putting words in their mouth.
- Team members should save questions for the end of the session in order to allow the ringleader to keep things moving and team members in character.
- Once a few enactments have been conducted and some strong themes or obvious issues are becoming evident, adjustments can be made to the enactment if time permits.

## STEP 7: CONDUCT SESSIONS

Show time! Relax and have fun. Putting the participants at ease helps to make the process easier and elicit better responses.

### TO DO

1. Greet participant and have them sign any needed forms.
2. Ringleader introduces the day's activities.

   a. Explain enactment concept.

   b. Introduce day's topic.

   c. Encourage honest input and feedback.

   d. Ask them initial questions to confirm their profile, for example, "Do you have children at home and how old are they?"
3. Begin enactment. Team members should take notes on their observations, especially key findings and strong quotes.
4. Ringleader wraps up enactment, asking any final questions and getting the participant to re-cap on three things they thought worked well during the journey, and three things they felt could be improved.
5. Opened up to team members to ask any remaining questions.
6. Ringleader thanks participant for their input and informs them of how it will be utilised.
7. Participant is presented with their incentive and escorted from the space.



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## STEP 8: REVIEW FINDINGS & REVISE

Once the first round of enactment sessions is complete, the team should come together to discuss key findings and determine where changes need to be made.

### TO DO

1. Begin to coordinate notes and findings, coordinated into original file if possible.
2. Determine definite areas in need of revision. These should be based on repetitive feedback, not just a singular suggestion.
3. Note areas that are still unclear or ambiguous and develop related questions to ask during next round.
4. Divide up tasks and allocate team members to alterations – scripts, props, the sequence of steps, addition of new steps, removal of unnecessary steps, etc.

### TIPS

- Again, be sure to alter materials consistently across the complete journey.
- If things have changed significantly, another practice session may be in order.

## STEP 9: CONDUCT SESSIONS

Take two! Repeat step 7.

### TIPS

- Make sure to explore all the outstanding questions the team may have. Don't be afraid to test them on participants.

## STEP 10: REVIEW FINDINGS & REVISE

Once the second round of enactment sessions is complete, the team should again come together to discuss the sessions. Key findings will be used to update related materials such as the journey map and create any additional project materials.

### TO DO

1. Coordinate all notes and findings, again into the original spreadsheet file if possible.
2. Determine definite areas in need of revision. These should be based on repetitive feedback, not just a singular suggestion.
3. Revise the customer journey map to suit and any other materials contributing to the final deliverables. Ideally, the props don't need to be revised a second time as they were developed just for use in the enactment.

### TIPS

- Consider conducting an Affinity Diagramming session to sort through data and help identify patterns or trends.
- For more information go to http://nform.com/tradingcards/affinity-diagram