

The Moment

Guide: The Service Design Scorecard

A guide on how to facilitate stakeholders to identify and prioritize ideas, and be confident in your chosen direction

Print. Read. Use. Discuss. Refine. Share. Get in touch.

The Moment works with leaders and teams in organizations facing disruptive change to build a long-term capability for innovation.

We believe that through the process of making things—products, services, and strategies—people and organizations can create meaningful impact and move forward, both now and in the future.

Need to contact us?

T +1 647 478 7336

E info@TheMoment.is

www.TheMoment.is

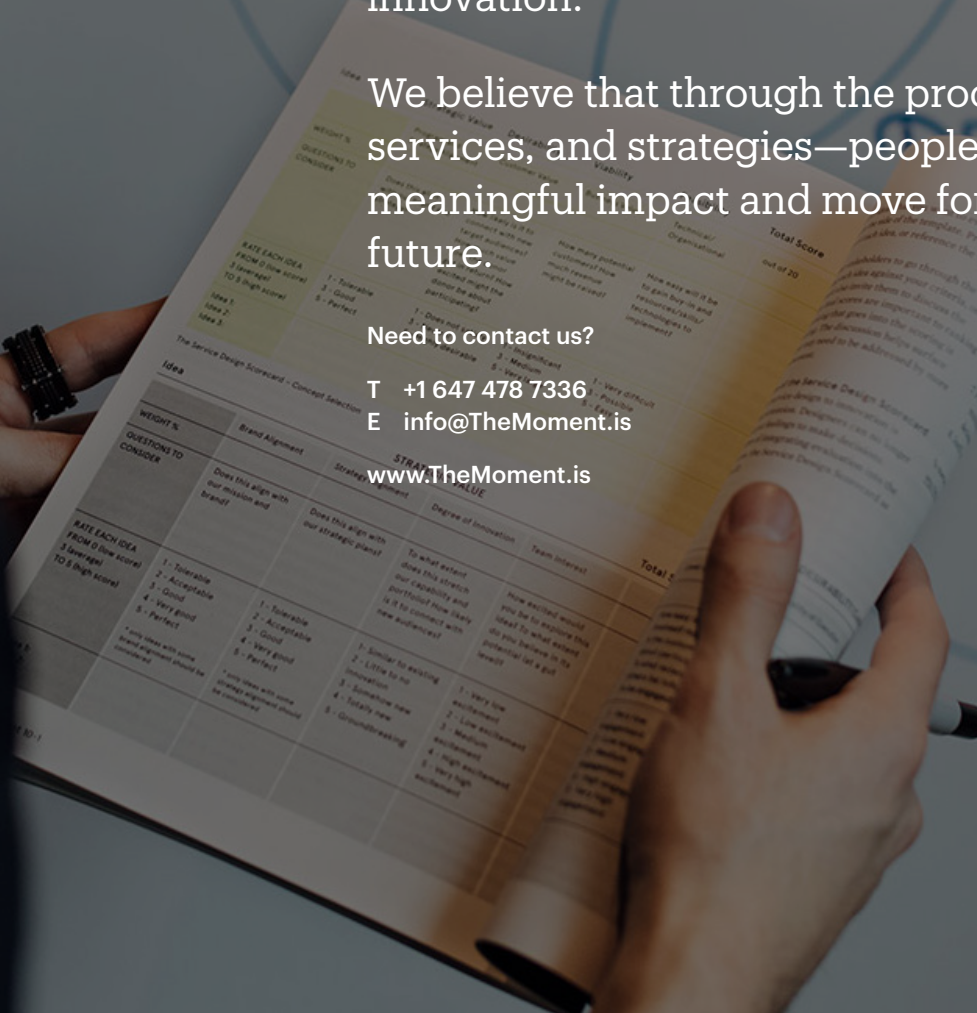


Table of Contents

TOOL OVERVIEW

| | |
|------------------------------|---|
| Introduction | 6 |
| The Service Design Scorecard | 7 |
| Why is a Scorecard Helpful? | 8 |

TOOL STRUCTURE

| | |
|---------------------|----|
| Four Key Components | 10 |
| Two Use Cases | 11 |

TOOL INSTRUCTIONS

| | |
|-----------|----|
| Steps 1–3 | 13 |
| Steps 3–5 | 14 |
| Step 6 | 15 |

TOOL IN ACTION

| | |
|----------------------|----|
| Case Study | 17 |
| Get Started | 18 |
| Innovation Resources | 19 |

Tool Overview

M

How do you balance your head and your heart when evaluating your own, or someone else's, creative ideas?

Introduction

In service design, the selection and evaluation of ideas can often be a painful, time-consuming process. We need tools to help designers and stakeholders confidently triage concepts and prototypes worth developing.

There are two documents that work as part of this system, and you should have both on hand: The Scorecard Guide (this PDF) and the Excel worksheet (click to download below.)

In this Guide, we'll walk you through when you should use the Scorecard System, how it works, and how others are using it successfully.

[Download the Scorecard Worksheet](#)

The Service Design Scorecard

We built The Service Design Scorecard system to effectively help identify and prioritize ideas in an effort to change the conversation.

When done well, a service design approach fuels the creation of products and services that resonate deeply with customers. However, we often lack evidence or have full certainty that ideas will work 'out in the world' when we're still in the early stages.

Before moving into implementation and testing, service designers, and their internal stakeholders, often struggle with the process of selecting ideas and solutions to move forward, especially when working with non-designers.

The Service Design Scorecard helps teams to evaluate an idea's strategic value so you can have confidence in your chosen direction.

Don't rely on gut reactions; evaluate with confidence.



Why is a Scorecard Helpful?

DESIGN IS NOT A LINEAR PROCESS

Going through the design process and selecting which path to take requires the continuous involvement of customers and stakeholders. The process is not linear; many concepts and solutions get generated, selected, and refined at various stages of the journey.

As stakeholders go through the design process, decisions must be made. Is the work proceeding in the right direction? Do we have confidence in this direction?

While we may think we make these decisions rationally, typically our first reactions are driven by emotion, rather than by evidence or information.

Gut feeling or low fidelity tools such as the impact/effort matrix may be enough for designers, but it gets complicated when service designers collaborate with a multidisciplinary group of stakeholders with various preferences, priorities, and even agendas.

“

...as the mind moves through a number of possible choices, it is the emotions that give the thumbs up or down, by fleetingly providing an insight into how the consequences of a specific choice would make us feel. However much it goes against our conception of ourselves as rational creatures, the role of the emotions in decision-making cannot be overstated.

Barry J. Gibb, *The Rough Guide To The Brain* (2007)

Tool Structure

Four Key Components

A good evaluation tool asks and seeks to answer key business and design questions. These questions usually go beyond, “Do we like this idea?” to delve deeper into the nuances of the specific concept or prototype: “How will this be implemented? What impact will this have? How will it be received?”

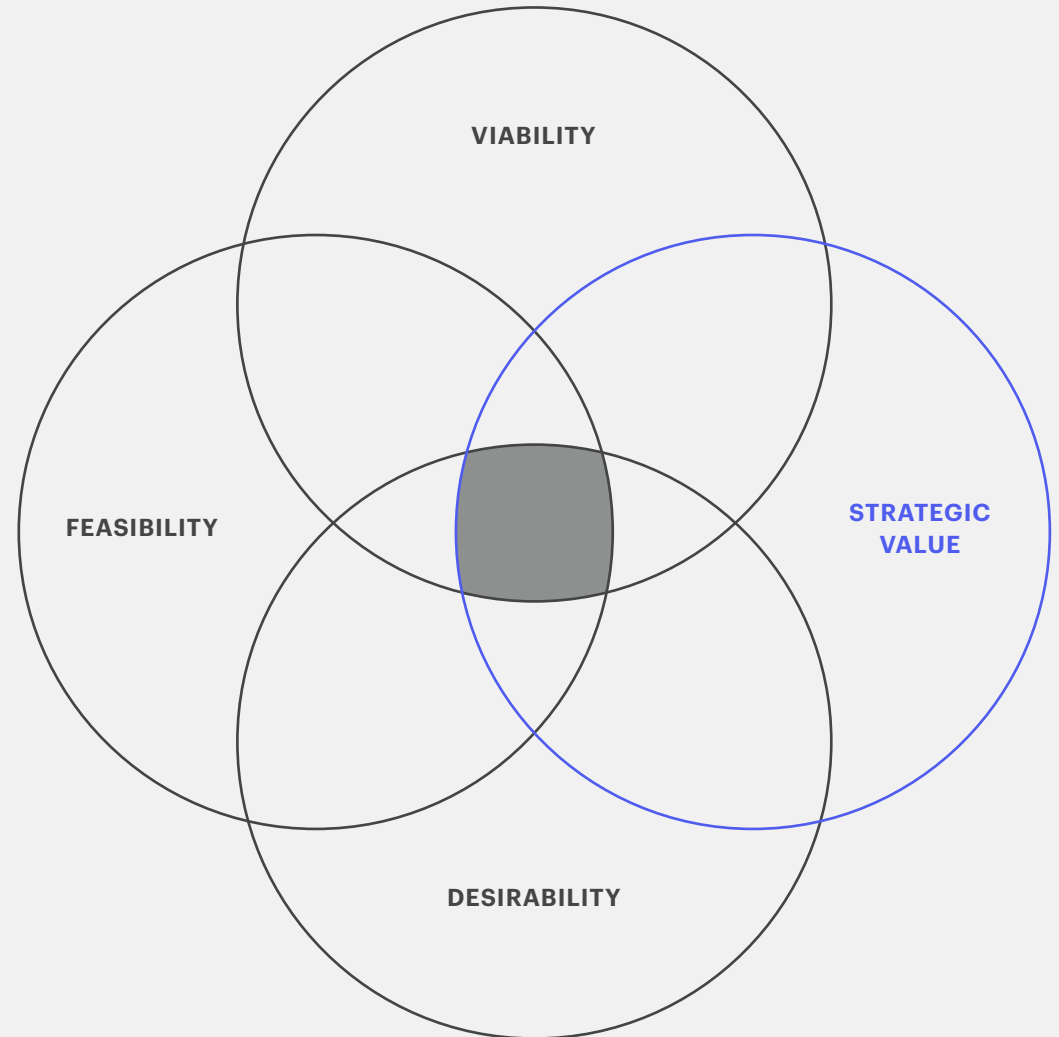
The Service Design Scorecard integrates four key components to assess fit: **Desirability, Feasibility, and Viability**—inspired from IDEO’s three lenses of innovation—in addition to a fourth component, **Strategic Value**, examining the degree to which the solution is aligned to the strategic goals of the organization.

Desirability: Questions whether your proposed solution is solving the right customer pain point

Feasibility: Assesses whether your proposed solution builds on core areas of strength within the business

Viability: Evaluates whether the solution contributes to the long-term growth of the business

Strategic Value: Examines the degree to which the solution is aligned to the strategic goals that the company hopes to achieve on the mission level, brand level, team level, etc.



Two Use Cases

There are two variations of the Service Design Scorecard: select a concept, or select a prototype.

In both versions, the Scorecard presents a series of critical questions that participating stakeholders are invited to answer and rate against predetermined criteria (included in the [downloadable worksheet](#).)

The questions ensure the stakeholders study various design and business aspects of the proposed idea(s) and score them according to the identified criteria, not their gut reactions.

The Excel worksheet will walk you through questions such as:

- Does this concept or prototype align with our brand? With our strategic plans?
- How excited are you to explore this idea?
- How much value does the customer/end user get in return?
- To what extent are assumptions driving the concept? How likely is it that the concept could fail?
- How long will this take to get to market? How much complexity and/or internal costs are associated with developing this idea?

Option 1: Conception Selection

Use this option when trying to select an early concept in their service design process.

The Concept Selection version provides four key high-level questions about the idea's Strategic Value, Desirability, Feasibility, and Viability.

You and your team will evaluate the different concepts across four categories:

- 1) Strategic Value: Program and strategy
- 2) Desirability: Customer/end user value
- 3) Viability: Business value
- 4) Feasibility: Technical/organizational complexity

Option 2: Prototype Selection

Use this option when trying to make a selection about which prototypes to test in market. This is often a more involved process, and is further 'downstream' in the service design process.

The Prototype Selection version breaks down the Scorecard components into more detailed questions, helping your team to evaluate each proposed prototype in more depth for each of the four categories:

- 1) Strategic Value: Brand alignment, strategy alignment, degree of innovation, and team interest
- 2) Desirability: Value proposition, level of engagement, quality of execution
- 3) Viability: Market size, market sustainability, revenue potential, degree of risk, differentiability
- 4) Feasibility: Likelihood of internal buy-in, effort to develop, ability to execute

Tool Instructions

STEP 1
Select a Use Case

Select which version you want to use: Concept Selection or Prototype Selection. (Refer to page 11 for advice on which path to choose.)

STEP 2
Define Your Criteria

Under each component, define the criteria against which you will evaluate your idea. While the main questions are standard, there is room to create your own that are unique to your project or organization.

For example, if your company is testing out a product for a new market, you could create a distinct category in desirability for “Potential Customer Satisfaction” or something similar.

STEP 3
Determine Criteria for Weighting

Decide on the weight you want to attribute to each component. In most cases the weights are equally distributed, but in some cases, we may put more emphasis on desirability at the concept selection phase if we would like to be more provocative and want to challenge the team beyond their comfort zone.



The screenshot shows the 'The Moment' tool interface. At the top, the title 'The Moment' is displayed in a large, bold, black font. Below the title is a table with a dark blue header. The table has three columns: 'IDEA', 'STRATEGIC VALUE', and an unlabeled column. The 'STRATEGIC VALUE' column is further divided into 'Brand Alignment' and 'Strategic Alignment'. The 'Weight %' row is highlighted with a red border, showing 50% for Brand Alignment and 20% for Strategic Alignment. Below the table, there are two rows of 'QUESTIONS TO CONSIDER' with corresponding questions: 'Does this align with our:' followed by a partial question 'Does this align with our: ['. The table structure is as follows:

| IDEA | STRATEGIC VALUE | |
|-----------------------|---------------------------|-----------------------------|
| | Brand Alignment | Strategic Alignment |
| Weight % | 50% | 20% |
| QUESTIONS TO CONSIDER | Does this align with our: | Does this align with our: [|

STEP 4 Develop a Scoring System

Develop a scoring system to evaluate each option. The proposed system provides a scale of 1 to 5 for each question.

The Moment

| IDEA | STRATEGIC VALUE | | | | TOTAL |
|-----------------------|--|--|--|--|-------|
| | Brand Alignment | Strategic Alignment | Degree of Innovation | Team Interest | |
| Weight % | | | | | |
| QUESTIONS TO CONSIDER | Does this align with our: 1 - Tolerable 2 - Acceptable 3 - Good 4 - Very Good 5 - Perfect | Does this align with our: 1 - Tolerable 2 - Acceptable 3 - Good 4 - Very Good 5 - Perfect | Does this align with our: 1 - Tolerable 2 - Acceptable 3 - Good 4 - Very Good 5 - Perfect | Does this align with our: 1 - Tolerable 2 - Acceptable 3 - Good 4 - Very Good 5 - Perfect | |
| Idea 1 | | | | | |

STEP 5 List Your Ideas

List all your ideas that you want to evaluate in the left column on the side of the Scorecard Worksheet. Provide a clear description of each idea, or reference the visual or artifact.

The Moment

| IDEA | STRATEGIC VALUE | | | | TOTAL |
|-----------------------|--|--|--|--|-------|
| | Brand Alignment | Strategic Alignment | Degree of Innovation | Team Interest | |
| Weight % | 50% | 20% | | | |
| QUESTIONS TO CONSIDER | Does this align with our: 1 - Tolerable 2 - Acceptable 3 - Good 4 - Very Good 5 - Perfect | Does this align with our: 1 - Tolerable 2 - Acceptable 3 - Good 4 - Very Good 5 - Perfect | Does this align with our: 1 - Tolerable 2 - Acceptable 3 - Good 4 - Very Good 5 - Perfect | Does this align with our: 1 - Tolerable 2 - Acceptable 3 - Good 4 - Very Good 5 - Perfect | |
| Idea 1 | | | | | |
| Idea 2 | | | | | |
| Idea 3 | | | | | |

STEP 6

Score Your Ideas

Host a session where you invite your stakeholders to go through the process of scoring each idea against your criteria one at a time. You could also invite them to discuss the results.

While the final scores are important to how solutions get ranked, the thinking that goes into the scoring is often more revealing. The discussion helps surface any big issues that may need to be addressed by more research and refinement.

Tool In Action

Case Study

We led a major Canadian financial institution to build a sales experience that both delighted customers and met existing business needs. Using research insights and co-creation sessions, we spoke directly to our client's customers. It gave us (many!) amazing ideas and directions to test out.

After low-fidelity prototypes and analyzing both opportunities and learnings, our team presented eight concepts to the client's larger stakeholder group from across the business. We used the Service Design Scorecard to evaluate and discuss each concept, and prioritize the next phase of the work.

As a result of the Scorecard, we effectively centred the discussion around the needs of the business and the design, leaving personal opinions and judgments out of it.

At the end of the meeting, this diverse group of stakeholders chose three new prototypes to move forward with.

Everyone felt confident about their choices, and we did it in a way that kept the business and customers front and centre, without any one voice dominating the conversation.



Get Started!

Ready to score your own ideas? It's time to put the Scorecard System to work and unpack the challenge with your own team.

As someone learning about, or very familiar with, service design, you'll likely have a good sense of how to run this workshop. The idea is to steer the conversation around the value of the product for the business and its customers; not people's personal opinions at the table.

To get started, you'll need to identify:

- Which option you will use: Concept or Prototype Selection
- Custom criteria, if any
- Custom scoring, if any
- Which key stakeholders should take part in choosing the concepts or prototypes
- Key visuals that can help centre the conversation around the product, business, or customer needs
-

Don't underestimate the power of group dynamics. You'll want to use the tool as a way to structure the workshop so that each individual gets a voice; not just the loudest or most senior person at the table.

It's also helpful to understand the team's creative styles and their readiness to do innovation

work, including their comfort or discomfort with ambiguity. You will prepare the team to be highly adaptive—not to get stuck in ideas, but to look forward and anticipate future value.

You will enable the team with the language of the Service Design Scorecard framework, including Desirability, Feasibility, Viability, and Strategic Value. The tool and definitions are best learned just-in-time, as your workshop attendees may have different backgrounds and levels of understanding. Make sure to level the playing field by explaining terms and ideas clearly and in plain language.

If you are not sure how to do all of the above steps, or you're not quite at the point of prototype or concept selection, then you probably need to engage a partner. We can help guide you and your team through these steps, and discover what projects or strategies will bring the most impact to your team and your organization.

Ready to begin?

Innovation Resources

As we continue to collaborate on new tools and methods to advance the practice of service design and innovation, we would love to hear how you are using this and any similar tools in your projects. Feedback or questions? Send us an email to hello@themoment.is

The Service Design Scorecard is a tool of The Moment, an Innovation Design Studio based in Toronto, Canada.

For more information, and access to other tools and resources, please see <https://www.themoment.is>

Innovation Resources



+1 647 478 7336

info@TheMoment.is

www.TheMoment.is

[@TheMomentisHere](https://www.instagram.com/TheMomentisHere)