The Experience Design Storyboard

Designing the experience…to create meaningful value and the best chance for healing



The Experience Design Storyboard defines how to deliver meaningful experiences for both your Customers and your employees. This visual tool organizes how you effectively engage your Customers and ensures relevance to them every step of the way. It connects the details of your daily service delivery to help be more proactive and efficient. In turn, this fits within the biggest picture of your organization. By recognizing Customer context, the Storyboard provides a framework to balance priorities and on-going improvements to the strategy, processes, systems, roles, and measures of the organization.

The methodology:

Experience Design is the most straightforward and manageable way to figure out how to deliver a service *and* its related experiences. We use a set of unique tools. These tools are connected in a series of learning workshops and design sessions. We also provide regular coaching to encourage new habits that enable new levels of performance. Throughout this process, your team's ideas and intentions are collected and recorded in an organic way, somewhat like planning and staging a good theatrical show.

The Experience Design Storyboard is based on leading-edge sciences of visualization, storytelling, process workflow, experience design, and behavioral psychology. This type of Storyboarding has the ability to create insight and organize ideas in a way that process and strategy design by themselves cannot. From my own experience, the most complex Disney theme park attractions were designed with this unique form of the Storyboard.

The value of creating a framework:

The value lies as much in the act of creating and using the Storyboard, as in the final deliverable. The people involved include not only leadership and cross-sections of staff that are the direct players in the specific processes and departments of the story, but often the suppliers-to and Customers-of the processes. In different forums, we facilitate conversations that generate and test the Storyboard. It is much more than brainstorming, telling stories, sending out surveys, or hosting focus groups to ask what we should do.

We provide a structure to focus on what is, or should be, in any scene and the means of flow between scenes.

The Storyboard collects ideas, forms patterns, and ends up defining the parts of the service and its experience. It establishes ownership from a tool that is easy to understand, helps build perspective, encourages new relationships, and enables learning / improving. Roles are clarified, territorial conflicts resolved and areas for improvement identified. The resulting output often reflects a stretch of current practices, both explicit and implicit, to pursue best practices and provides a framework tool for future improvements.

The idea of the "Story" helps us anticipate the set of things needed to deliver an effective service with an intentional experience. This proactive capability tends to setup the organization better for efficiency and ultimately gives the Customer the perception of trust, confidence, and the feeling of thoughtful care.

The parts that make up an Experience:

The deliverable itself is an imaginative, graphical representation of activities, issues, and mechanisms – at an altitude that enables broad, yet specific, Customer-focused factors to be addressed. It begins with a precisely defined profile of *needs* and ends with an equally well-defined set of plans. Each storyboard is unique in representing the important qualities of the organization – how it will leverage its values, its understanding of the market, and its capabilities to deliver meaningful value to the Customer.

Storyboarding helps people visualize what an entire service experience will look like. We help this process by literally creating the big picture – a wrap-around-the-room set of panels depicting each chapter, scene and stage. Visually seeing the whole flow of service at once brings to better focus how everything is connected and allows individuals to get a sense of what all contributes to, or distracts from, a good experience.

Implementing and sustaining the design:
Often, simply having been immersed in the Storyboarding process instills change that can show-up in operations right away. Storyboarding can stimulate fresh attitudes and give perspective to otherwise typical conversations. Innovation is built into the approach. The gathering of ideas helps to facilitate a dialog for buy-in, uncover concerns, and bring out new examples of ways to implement your best practices.

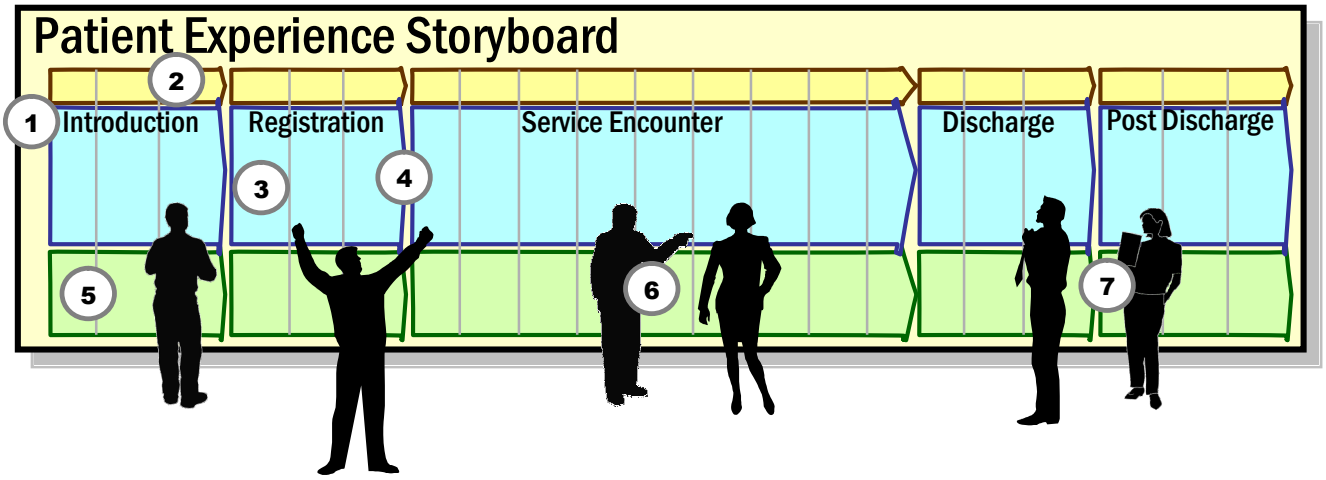
> *"We built a Storyboard to learn, plan and design the operation of a new hospital. At first we sketched-out what we thought we knew – our idea of best practices, 'positive cues' we would want to deliver, and 'negative cues' we thought we would probably need to eliminate. Many people contributed their ideas: nurses, doctors, administrators, staff that had been Patients, industry colleagues and executives. We organized it in the Storyboard and into what we called an "Ideas Master" database; the database helped us search for common themes and later see patterns for systematizing solutions. Things like: facility layout/design, physical features/signage, new services, training, behaviors, communication issues, information needs, and many more.*
>
> *Soon we were compelled to see the 'real' situation, so we met with a sampling of "Network" Patients/families. We filled-in "Snapshot" worksheets. Quickly we confirmed what we knew, and impressively what we didn't think to mention or didn't know. Often it seemed that our assumptions of what we could do, or not do, blinded us to what was a real concern or discomfort to the Patient. As we put these things into the Storyboard (in noticeable red text) we saw patterns of opportunity. Some of these solutions we later called "bundles".*
>
> *The most amazing thing was that many of the things that were consistently seen as 'negative' were easy to correct. Things like going "off-stage" when you want to talk about something the Patient or family shouldn't hear – complaining about a doctor, fussing about a personal schedule, talking on a cell phone, or smelling a nurse's lunch from down the hall when the Patient can't yet eat. There were many more.*
>
> *The best outcome was when leaders and managers saw what was being systematically delivered to the Patient and family – right or wrong; now it was easier to talk, agree-on, and coordinate how to make changes."*

Designing an effective service experience must deal with the many parts that represent reality. This intentional approach includes steps that help us discover how to eliminate what does not work. Then, we can better benefit from what does work.

> *"It became clear: if we could address the 'negative' elements in the Patient/ family experience it could have a profound effect on the Patient attitude and their ability to participate in their own health care processes. It was also clear that any investment in 'positive' without eliminating the 'negative,' was going to have mixed results at best."*

It identifies not only the places where service occurs, but also the behaviors, processes, roles and skills, systems, and management that contribute to the experience. A flexible, phased approach and a good set of tools help get through the details, enabling improvements to happen faster and with more insight than is common.

Our goal is to build and operate a business based on a clear focus of what it takes to address the reality and variations for Customer success. The processes, mechanisms, facility, and behavior account for *what we must do* directly and indirectly to achieve that goal. The more we are aware of the Customer issues and needs, the more we can be relevant. The more we understand what is relevant the more we can we can be proactive. Also, being more systematic inherently enables internal efficiency and assures greater effectiveness in our business of servicing our market of Customers.



EXAMPLE: A Storyboard of the Hospital Patient Experience

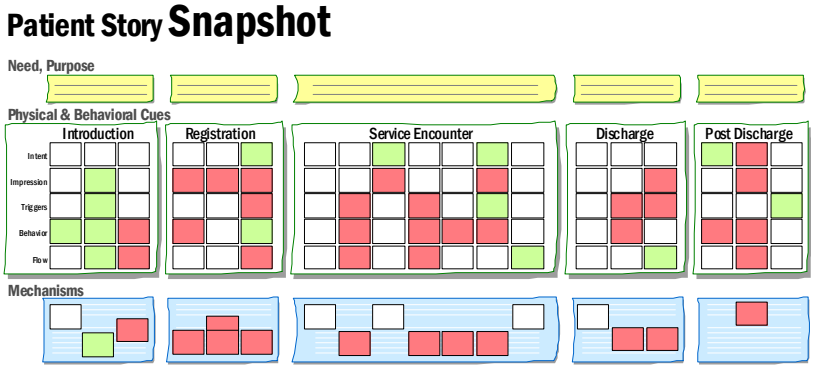
Organized in Chapters, with the Scenes, Stages, and Mechanisms that support the service experience – the Storyboard answers: "What needs to be done, by whom, when and how?" It helps us better anticipate.

1. **Chapters, Scenes, Stages**
   It starts with a structure of Chapters, Scenes, and Stages. This layout ensures a place for the activities, physical things, and behaviors necessary to deliver a predictable set of outcomes to a diverse set of "Customers" in an intended (positive) way. This organizes Customer needs as part of a physical, emotional, and sometimes spiritual relationship. Waste, problems, missed opportunities, and lack of clarity become apparent. Variations and alternative paths can be recognized. Points of critical decisions or information sharing are explicitly identified.
2. **Relevance – understand uniqueness**
   The Storyboard exists to define systematic delivery of value, relevant to any Customer – i.e. how we intend to connect our purpose with their full set of needs. Relevance is a key element in being effective with the Customer. It significantly reduces our costs and improves satisfaction and loyalty. The true value of any product/ service is based on who the Customer uniquely is, their state-of-mind, and how we recognize this; there are points along the course of our relationship with them where our purpose and their needs are critical. The more their 'needs' are understood, the more effective their experience, the more beneficial our purpose – both near-term and long-term. Any service deliverable is more than just an outcome, but the personalized care and positive memories of achieving and follow-up on that outcome. The sensitivities of different people might be recognized by age, personal condition, gender, culture, etc.
3. **Engage**
   Cues are the things that will be noticed and will affect impressions. They can be physical sensations from any or all of the five senses, or behaviors detected at any moment. Each tells the Customer what's important, what's really going on, and how they fit in. We first eliminate the negative cues, and then we trigger the positive.
4. **Flow**
   Flow is about continuity, connecting seamlessly; it contributes to comfort, confidence, and trust. Flow demands connection between physical places or things, between people and their shared understanding, and an awareness and use of information.
5. **Mechanisms**
   These are the tools, processes, technologies, policies and other resources needed to effectively deliver relevant stories. Well connected systems better support and leverage the full capability of the people and processes to deliver predictable results. Yet systems without the right process and flow will lack focus and efficiency – often *speeding-up a mess*. Relevant processes easily derive or are validated from a thoughtful Storyboard.

6. **Adapt – continuously recognize areas for improvement**
   The Storyboard often starts by reflecting conditions as they are, sometimes stretched as far they can be. This can help us see the gap between what we have intended and what should be; it can help record the "hot spots" where additional benefit can be achieved. It can help to clarify priorities and show high-leverage opportunities for maximizing future performance.
7. **Measurement**
   Measurements can be critical indicators for the performance of process, systems, and human behavior. They can enable clarity and motivation for on-going improvement and strategic innovation. There are logical points along the course of a story that deserve to be measured, allowing for better prediction, control, and improvement. Trend charts and other dashboards can tie into the Customer-centered nomenclature of the Storyboard.

Catalytic Triggers:
As a broad framework for the scope of product/ service delivery, the Experience Design Storyboard helps us to imagine the possibilities of what we can do and helps us to discover what will contribute to the sense of good flow. Once we clarify these things, we can then see what will best leverage our resources and 'kick-it-up-a-notch'. These leverages can be *catalytic triggers* for change:

The '***snapshot'*** of present conditions is a 'trigger' tool that can quickly bring to light what and where the Customer's positive and negative sensitivities are in an existing service operation; it helps see what might go un-noticed, or shows patterns of behavior or physical norms that affect a good service and its experience.



A Snapshot view of a Patient experience.
Red denotes "negative cues"; Green identifies "positive cues"; White spaces give context of other things that were going on

A profile of ***'best practices'*** can trigger awareness of what might be possible directly or indirectly; things we can adapt to our unique situations.

A ***'trends-in-the-market'*** summary can bring clues as to what might be desired, or sensitivities; this helps us be more aware of where we 'can be' and 'should be' – a looking to the future.

The '***demographic/ psychographic'*** profile will provide insights to the needs of different kinds of people; it helps define relevance in the diversity of our Customers.

These and other techniques can start the creative tension and enrich the story recorded in the Storyboard. Any of these must be approached with a discovery attitude – where we offer little judgment at the beginning, until a full set of ideas are in. At that point, the potential elements in an experience must be tested against all other aspects of the company (i.e. values, mission, priorities, other initiatives, strategic goals, capacity, and lessons learned). From here the Storyboard is edited to show the sensibility of the final plan of delivery and tested once more for relevance to the Customer and capability of the organization.

ABOUT THE AUTHOR & THIS UNIQUE FORM OF STORYBOARDING

Art Frohwerk developed and led the first Storyboard methodology known that linked complex engineering systems and cultural design to the Storyteller's intension. The storyboard at Disney was originally an imaginative pictorial sequence of artist drawings representing the flow of scenes that would make up any new attraction – a ride, a show or movie, whole areas of the park, or special events. The storyteller would use these pictures as a backdrop for describing what the Guest would experience through every one of their senses. Sponsors would get enlisted, management would become supportive if it made sense, and model builders would go off and get started. Engineers and planners would take lots of notes then go back and see if they could make any sense of them a few hours or days later.

Art realized that all the best stories in the world would not create a wonderful park unless the technical parts and right people behaviors were intentionally brought together in a plan to systematically achieve the desired result. This caused the storyboards to suddenly begin connecting to orderly sets of lists, drawings and descriptions of their own – an engineering 'system plan portfolio'. These sets of technical pictures helped others to see how to design, build, test, train, and implement the story. As the story might change – which commonly happened – the notes would change systematically with it. In this process important issues were often discovered, new opportunities were created, and complexity became manageable.

Mr. Frohwerk was one of the first Chief Engineers at Disney Imagineering. Art and his teams designed and started-up Epcot Center at Walt Disney World, Tokyo Disneyland in Japan, and all major new projects invented in the 1980's.

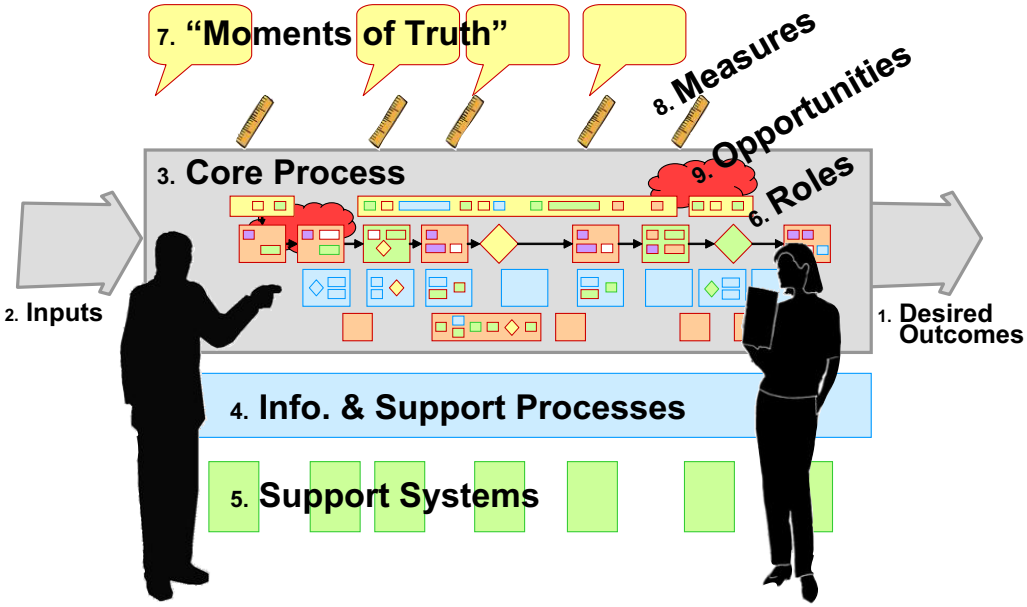
Since then this perspective and set of tools has been applied in over 100 projects, in almost every industry; healthcare has been of particular interest due to the chance of improved healing, reduced error, improved connections, and lower costs. These methods are continually being improved through the energy and insights of great clients and their diverse challenges around the U.S. and parts of the world.

> *For Disney, the team was focused on creating the Happiest Place on Earth. Sounds easy enough, right? Well, just think of all of the big things and little things it takes to make a theme park not just a wonderful place to visit, but the Happiest Place on Earth. To create this condition, the experience had to be wonderful-by-design. From the moment of anticipation when you first heard of "Disney," to the way it felt when you stepped into the park, to memories afterward of riding a ride, or taking that picture with Mouse ears on your head, the theme and flow had to consistently offer positive memories. Negative cues were designed-out and maintained-out, on-stage and off-stage, Cast Member to Cast Member – day and night, every day.*

Master Process

The Master Process describes how every activity, system, resource, and person is connected to the strategic goals and initiatives of the hospital. It is valuable for orienting every team member on how they, and their more detailed processes, fit into the big picture. It provides a framework for adapting and improving efficiency and effectiveness in every dimension of the Patient experience.

We will design and create the conditions for our efforts to be more clear, relevant, and systematic. The more we are aware of everything we must do, the more we can be *proactive*, enabling insight and innovation in serving our Patients and working as a team.



The value of the Master Process is as much in the experience of creating one as in the final deliverable. The activities surrounding the creation of the Master Process involve not only the key owners in the process, but often the "suppliers-to" and "customers-of" the process. In the conversations that are generated, roles are clarified, uncertainty and conflicts are resolved, and areas for improvement and innovation are identified.



Photo: Seton Family of Hospitals

The Elements of Business:

The Master Process identifies all of the elements that contribute to an organization's success – the business processes, internal support activities, roles, external relationships, "moments of truth," measures, and the areas for innovation and improvement.

This unique graphic is a representation of an enterprise at an altitude that enables broad, "big picture" operational issues to be connected and resolved. It begins with a clearly defined set of inputs and ends with an equally well-defined set of desired outcomes. The resulting deliverable reflects a "willing stretch" of current practices, both explicit and implicit, and provides the framework for ongoing process, systems, and operational innovation.

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MASTER PROCESS OVERVIEW

1. Desired Outcomes:
The whole purpose of the Master Process is to assure delivery of unique value by transforming given inputs into a set of valued results, consistent with strategic imperatives. The more clearly the desired outcomes are described, the more efficient, focused, and meaningful the process design.

2. Inputs:
The inputs trigger our actions. As we see patterns of inputs in variation and intent, we can learn to interact and be more robust in how we work. With tools in place and good questions ready, we can better anticipate, understand, and meet the real expectations.

3. Core Process:
The central portion of the Master Process is the systematic flow of activities that are necessary to deliver predictable value. The core process answers the questions of what needs to be done and how it gets done. Waste, disconnects, and lack of clarity become apparent and get corrected. Variations and alternative paths can be recognized and included. Critical decision points are explicitly defined.

4. Information & Support Processes:
A core process exists in the context of other processes and information needed, some outside of our control. Effectiveness will be achieved by optimizing our relationships, building meaningful connections, and creating routine and seamless integration of sub and support processes with the core process.

5. Support Systems:
These are the tools, templates, technologies, policies, structures, and resources needed to enable the efficiency of the Master Process. A relevant set of support systems will leverage the organizational capability. While our Master Process is dependent on support systems to achieve its full potential, a great support system without a sound Master Process lacks focus and direction and can speed-up a mess and sub-optimize the parts.

6. Roles:
In the course of creating the Master Process, skill sets and accountabilities become apparent. We often notice unreasonable expectations, gaps or mismatches of existing roles. We have the chance to better see what is required to smoothly deliver desired outcomes. The Master Process facilitates the understanding and definition of the optimal organization roles, relationships, skills, and attributes.

7. Moments of Truth:
There are logical Patient issues and expectations along the course of any service. Quality is defined and trust is ultimately built with the Patient in these moments. These are key leverage points in the process where we can be both proactive with the Patient ("wow, you read my mind! You care."), significantly reduce our operating costs (unplanned, reactive, disorganized efforts), and improve our own satisfaction in achieving the desired outcomes.

8. Measures:
There are specific points along the course of our work that should be measured, allowing for better prediction and control (lead indicators) or achievement of desired outcomes (lag indicators). The trends of these measurement points are critical indicators of process performance and enable corrective action for on-going improvement and strategic insights for innovation.

9. Opportunities:
A Master Process will reflect conditions as far as they can willingly be stretched (implicit and explicit processes). The creation of this picture facilitates the identification of areas where additional benefit can be achieved. These will be high leverage opportunities for maximizing performance – some 'early wins' and some 'when we're ready'. Implementation will be based on organizational priorities and its readiness for assimilation.

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