PROTOTYPING SERVICE PROCESSES AND EXPERIENCES

INVESTIGATIVE REHEARSAL

Investigative rehearsal is a theatrical method to deeply understand and explore behaviors and processes through iterative rehearsal sessions.

Duration	Varies with the depth and complexity of the scene – from 20 minutes to a few hours per scene
Physical requirements	A flexible, private space, furniture, whatever objects are at hand, a flipchart, a starting point
Energy level	High
Researchers/Facilitators	1 or more
Participants	12–30
Research techniques	Use-it-yourself (autoethnography), participant observation, co-creative workshops
Expected output	Research data (specifically a list of bugs, insights, and new ideas), raw video footage and photos, more questions and hypotheses

Rehearsal is a key theatrical technique in service design. Unfortunately, most people misunderstand the word, and think it means doing something over and over again until it is perfect and unvarying. In theater, we call that "practice," and save the term "rehearsal" for the far more interesting explorative process of developing and trying many options, experimenting with different ways of working together, investigating different types of timing and rhythm. To emphasize this explorative aspect, we use the phrase *investigative rehearsal*.[01] Similar techniques include bodystorming, service walkthrough, service simulation, and role-play.

Investigative rehearsal is a structured, constructive, full-body way to examine interactions and develop new strategies. It is a powerful technique based on Forum Theater,[02] and can be used to examine, understand, and try out behavior or processes. It clarifies the emotional side of an experience and can reveal many practicalities of the use of physical space, language, and tone of voice.

01 Lawrence, A., & Hormess, M. (2012). "Beyond Roleplay: Better Techniques to Steal from Theater." *Touchpoint* 3(3).

02 Forum Theater is a well-known technique from the "Theater of the Oppressed" by influential Brazilian theater director Augusto Boal; see, for example, Boal, A. (2000). *Theater of the Oppressed*. Pluto Press. Investigative rehearsal uses participants' own experiences, ideas, or prototypes as a starting point, and goes beyond Forum's focus on behavioral strategies to also examine and challenge the basic process, the architectural setting, support tools, and more.

It can be used at many stages of the design process – to design the research questions or even as an approximation of real research (using frontline staff, for example). It can also be used for ideation, prototyping, and testing, and even for training the staff for rollout of a new service system, helping the staff find their own interpretation of the process.

Step-by-step guide
PREPARATION

1 **Decide or reflect on purpose and prototyping or research questions:** Before you start, decide or reflect on the purpose and the prototyping or research questions. What do you want to learn? Do you want to test the whole or just a part of the experience? Which part are you most interested in? How detailed do you need or want to get?

2 **Create safe space:** An investigative rehearsal is an unusual tool, so it needs to take place in a situation of *safe space*.[03] For a newer team, you will need some time to create that mental and physical setting. Consider doing some warm-up

[03] See #TiSDD chapter 10, *Facilitating workshops*, for more on safe space and an example workshop plan using investigative rehearsal.

activity (see #TiSDD chapter 10, *Facilitating workshops*, for examples) and establish the Rules of Rehearsal (see textbox) to agree on how to work.

RULES OF REHEARSAL

Setting the stage for a successful rehearsal session.

1. ....Doing, not talking.

2. .... Play seriously.

3. ....Use what you have.

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3 **Find a starting point:** The rehearsal will also need a starting point – and finding that starting point can be part of creating the safe space. For a project based on existing services or experiences, the starting point might be a set of stories generated from research or assumptions by the workshop participants (e.g., created through storytelling games). Extreme stories of emotional customers or difficult situations are most productive. You can quickly turn these into storyboards to help people get them straight and to act as a reference during the rehearsal. For a very new service, you can start

with some future-state customer journey maps instead.

4 **Set up teams, room, and initial story:** Depending on the group size, divide the room into several teams of about 4–7 people each. Each team starts with one story or one version of the prototype journey. They will need a little time to prepare a (key) scene of the story, but don't give them too long – the longer they have, the more nervous they will be. Tell them you only expect a rough draft as a starting point and give them no more than a few minutes. If anyone in the team was part of the original story being played, they should not play themselves in this re-creation.

Step-by-step guide
USE/RESEARCH

1 **Rehearse to investigate:** The investigative rehearsal process itself has three phases. With inexperienced groups, it is wise to stick to this quite rigid structure, or else the creativity can get out of hand and the work will become unfocused and trivial.

— **Watch:** First, ask each team to play through their scene in just a couple of minutes, to give everyone an overview of what happens. Ask them to use the whole set, entering and leaving the room as a real person would (they should use a real door as the entrance if possible). Do not comment on the scene, but applaud when it is done. You might look at all the teams' scenes quickly, then decide which one to explore first.

— **Understand:** Now ask a team to start again, and ask people outside the scene to call "stop" when they notice anything interesting. This might be a physical challenge, an odd process step, a particular choice of words, or revealing body language. There might be a "stop" every few seconds – as a facilitator, try stopping after just three seconds of the scene and asking, "What do we know already? How do we know that?"

The goal of this phase is a deep understanding of what is happening on a physical and motivational level. Ask questions like "How is he feeling?" or "What's happening right now?" You might want to help participants by encouraging them to be specific. If they say, "I see the clerk being open and honest," ask them, "How exactly is the clerk being open and honest? What is she doing which makes her seem open and honest?" Note the insights and move on – do not change the scene. If the scene is a long one, you might not need to run through all of it in detail – just keep going as long as is meaningful. End with applause.

— **Change and iterate:** Now ask the team to play the scene again, but this time the audience should call "stop" when they have an idea of what could be different on the service side. Ask for alternatives, not improvements. When a "stop" comes, tell them not to describe the idea, but to show it by taking over a role in the scene (Rule 1: "Doing, not talking"). If possible, change only one thing at a time and let the changed scene run for a while, so the group have a chance to see the effect of each change before stopping again.

When you have had enough time to see the effects (if any) of a change, stop the scene again and ask the audience – not the volunteer who suggested the change – what the volunteer's tactics were ("What did he change?") and what they noticed ("What happened then? How did it feel?"). You might then ask the other people inside the scene how they experienced the change. Sometimes – quite rarely – it can be helpful to ask the volunteer to explain their intention. In your discussion of the changes, try to avoid judgment – a change is neither good nor bad, it simply has a certain effect which you might be able to use. Try to pinpoint what the effect was, and record the idea (and perhaps its effect in this scene) on the flipchart. Then decide if you want to follow it up by continuing the scene from there, look at alternatives, or return to the original version. Iterate, iterate, iterate.

2 **At all times, keep a concise list of bugs, insights, ideas, and questions:** It is key to keep track of everything you learn during any part of the rehearsal session. After each step, ask the team to take a few moments to reflect on what worked, what didn't work, what they would like to change or try next.

Document the results on a flipchart with separate sections for insights, bugs, ideas, and new questions.

3 **Decide on a next scene and repeat:** After the current scene has been finished, switch to the next team or revisit your original starting points and decide on which part to try next. Then go again. Stop when either the set time for your workshop is up or the group have hit a roadblock that requires them to switch to other core activities next – for example, doing some more research, more intensive ideation, or switching to other prototyping methods.

4 **Document:** Document and finalize your work. Use customer journey maps, photo storyboards, or a video to document the latest version of the service experience from your rehearsal. Briefly reflect on your documentation flipcharts and identify key insights, ideas, bugs, and questions. Try to agree on potential next steps to advance the project based on your new learnings.

A A team "stress testing" the returns procedure of a retail service using investigative rehearsal. Two team members simulate the encounter, while others are ready to step in with alternatives to process, setting, systems, or behavior. The designer behind the laptop represents a human being in the original scene – but she could easily represent (or become) a digital system.

B After each step the team reflect on what worked, what didn't work, what they would like to change or try next. Keep it brief. Then move on, sticking to "Please don't tell me, show me!"

Method notes

→ **Keep them focused and moving:** The facilitator will need to keep the team focused, moving, and honest. At the same time, she needs to keep the team realistic, making sure they are not creating a perfect world where everyone really needs their service and is enthused about it. Experience shows it's better to demonstrate a problem or advantage within the scene than to talk about it, so she will often have to say, "Please don't tell me, show me!"

→ **Explorative or evaluative – studio or contextual:** The investigative rehearsal as described here is a great explorative prototyping activity. In its most basic form it only requires people, an empty room, and an inspiring prototyping question. However, if you decide to run the session in context – perhaps at the actual workplace of your users with real staff taking over the roles, or in a very good simulated environment – investigative rehearsal can produce real and valid learnings to support your decision making.[01]

→ **Keeping track:** As you go through the scene, you will quickly build up a long list of tested ideas, generated by the participants themselves from their own real stories or their prototype. You can reflect on these later, and decide which ones to incorporate in your next prototype, future-state customer journey map, or implementation.

Don't call it "role-play"! The term is unpopular because it is misused in many training courses. Technically, investigative rehearsal is not role-play, but it looks very similar. So, call it rehearsal, simulation, bodystorming, a service walkthrough, or don't call it anything – just say "show me."

Variants: Partial service rehearsals or walkthroughs

Based on the investigative rehearsal, there are several more types of often accelerated partial rehearsals or walkthroughs. They are intended to help people who are designing or delivering a service become familiar with the sequence, connections, and intentions of an interaction without (for the moment) considering their presence or own effect on others – their body language, tone of voice, facial expressions, etc. In the following rehearsal variants, the

01 Oulasvirta, A., Kurvinen, E., & Kankainen, T. (2003). "Understanding Contexts by Being There: Case Studies in Bodystorming." Personal and Ubiquitous Computing, 7(2), 125–134.

communication is usually directed inward at the team, not outward toward a customer or audience.

→ **Sitzprobe or seated investigative rehearsal or talk-through:** The Sitzprobe usually is a spoken rehearsal[02] – the team speak through a service scene, e.g. seated in a circle. They do not worry about timing, movement, or technicalities. They simply go through the verbal element of the service, perhaps with quick description of the actions which cannot now be seen, such as "then I give him the envelope …" Variants include speaking through the service very fast, taking on each other's roles, or even running the service scene backwards. Seated rehearsals can involve customers as well as frontstage and backstage staff and are great to get a first impression of the bigger context, allowing us to explore the generic flow of conversations across the holistic service experience.

→ **Blocking rehearsal:** During a blocking rehearsal, the team move through the actions of a service scene, if possible in the real context or a simulated environment. There are no verbal elements, or verbal elements are reduced to the beginning and end of each statement, such as, "So let me explain how you open … blah blah blah … and now you can see the reading."

→ **Technical rehearsal:** The team move through all technical aspects of a service scene, making sure that every single technical action is performed – flipping the switch, starting the software, packing the envelope. Everything non-technical (movements in the room, spoken elements) is abbreviated or skipped. The technical rehearsal is sometimes combined with the blocking rehearsal.

Partial rehearsals are flexible tools that can be used all across the design process. During research, they can help to elicit and document existing service processes. Try getting all stakeholders of a business process in one room and doing a seated rehearsal. Have them simulate a typical case, talking through each individual step, and record the results. Later, during prototyping, these techniques can help you to choose the best lens to efficiently move your prototypes forward. Moving toward implementation, these types of rehearsal are often employed when the structure of a service scene is already quite well developed, but the participants need to become more familiar with it and understand the structure, content, and connections better – until they become internalized and automatic.

Variant: Rehearsal for rollout

An employee's demeanor and behavior are a crucial part of the service experience for customers. Just like an actor playing a role, a staff member needs to appear professional, show appropriate emotions, and master a complex "script" (the service process) while still being his authentic self, not an automaton. Like actors, too, they need to be able to use stage, costume, and technology to support their performance, and must be able to read their audience and adjust their actions appropriately. When will they have the chance to explore their options, share their discoveries, and find their own voice within the service? Rehearsal during rollout, and indeed during the regular running of a service, can be this opportunity. ◄

02 Or singing rehearsal, as the Sitzprobe originates from musical theater, where singers would sit next to the orchestra to rehearse. In service design, singing is very much niche and rarely used, unfortunately.