DESKTOP WALKTHROUGH

Desktop walkthroughs can be seen as interactive mini-theater plays that simulate end-to-end customer experiences.

Duration	**Preparation:** Anywhere from a few minutes to a couple of hours **Use/research:** 1–2 hours (set clear timeboxes for iterations) up to a day
Physical requirements	Pens, scissors, glue, paper, cardboard, plasticine, toy figurines, flipchart paper, sticky notes, digital camera
Energy level	Medium
Researchers/Facilitators	Minimum 1
Participants	3–6
Research techniques	Participant observation, interviews, co-creative workshops
Expected output	Documentation of processes and stakeholder journeys, shared understanding about criticality of elements

A desktop walkthrough helps the design team to quickly simulate a service experience using simple props like toy figurines on a small-scale stage (often built from LEGO bricks or cardboard), and test and explore common scenarios and alternatives.[01] The critical deliverable is not the model of the map/stage but the experience of playing through the service experience step by step.

The desktop walkthrough is one of the signature methods of service design. It helps to make the experiential process nature of a service – a story unfolding over time – tangible. Compared to paper tools like customer journey maps, desktop walkthroughs allow service concepts to be iterated at a much faster pace. New ideas can be instantly identified, tried, and tested. The service concepts get refined quickly. On the other hand, walkthroughs are very engaging as well as easier to do for a lot of participants.[02] They especially help:

01 See Blomkvist, J., Fjuk, A., & Sayapina, V. (2016). "Low Threshold Service Design: Desktop Walkthrough." In *Proceedings of the Service Design and Innovation Conference* (pp. 154-166). Linköping University Electronic Press.

02 While we experience a lot of reservations in participants toward sketching or drawing, there are less objections to building and playing through. The focus on visualization that is present in many publications in the design field might be a bias that stems from the fact that designers are traditionally trained in these fields. To be able to use the skills and talents of all participants in a co-creative setting, there should be a balance across any media that are useful and available (written/spoken word, acting, building, sketching, etc.).

— To get a shared understanding within your team about the end-to-end customer experience

— To identify the critical steps in the journey

— To identify any other key elements or problem areas that need to be addressed

This makes it a great method to do before you invest too much time and effort on creating a beautiful visualization of a customer journey.

Step-by-step guide

PREPARATION

1 **Review scope and clarify prototyping questions:** Briefly reflect. What is your scope? What do you want to learn from this prototyping activity? Do you want to test the whole experience or just a part? What are the aspects and details you want to test for later? Also think about who you want or need to involve in this walkthrough. Is it just for within the project team, or are you planning to involve potential users or other stakeholders?

2 **Prepare workspace and materials:** Pick up your desktop walkthrough materials and a couple of big sheets of flipchart paper. Set up the paper on a table. Make sure the table is not too big so everybody can stand around it and contribute at the same time.

3 **Brainstorm an initial journey draft:** Select a customer/persona and do a brief brainstorm: looking at your new service concept, what are possible steps in the customer journey? Then, quickly sort your sticky notes in chronological order. There is no need to create a full-fledged customer journey yet. Do just enough to get a sh!tty first draft of what the journey could look like.

4 **Create maps and stages:** Based on your initial journey, what locations are important? Start by creating a big overview map that contains all the relevant locations of the service experience. Then, decide if and where you need to zoom in on certain locations for some part of the service (e.g., zooming in on the interactions that happen in one store inside a shopping mall). If necessary, create a detailed stage plan for each of these locations.

5 **Create roles, set, and props:** Which roles need to be cast? What needs to be built? Pick a figurine for each of the roles/key stakeholders in your service and quickly build the essential set and props, using paper, cardboard, plasticine, or LEGO bricks to set the stage.

6 **Set up roles:** Find your actors. Who is going to play which role? Also, it can be helpful to assign someone to keep track of the bugs, insights, and ideas queue during the walkthrough.

Step-by-step guide
USE/RESEARCH

1 **Do a first walkthrough:** Who or what has to move at each step in the journey? Does everything fit together? Put all the actors and props onto their starting positions and, loosely following the events from your journey draft, play through the service from beginning to end. Move your figures around on the map/stages. Act out all necessary dialogue and do all the interactions with other actors, devices, and so on.

2 **Keep a list of bugs, insights, and ideas:** After each run-through, take a few moments to reflect on what worked, what didn't work, what you would like to change or try next. Document the results on a flipchart with insights, bugs, new ideas and questions.

3 **Decide on the next variation and iterate:** Check off the idea that has just been simulated and, in your team, quickly decide (show of hands, simple majority) which of the still open changes and ideas you want to try next. Then go again. If you think that last walkthrough was a real cracker, create a quick, less than 60-second video pitch of the walkthrough to capture it for later. Stop iterating either when the set time for your workshop is up or when the group have hit a roadblock that requires them to switch to other core activities next – for example, doing some more research or more intensive ideation.

4 **Document:** Document and finalize your work. Use customer journey maps, photo storyboards, or videos to document the latest version(s) of the service experience from your walkthroughs. Briefly reflect on your documentation flipchart and identify the critical steps in this journey, other key elements, as well as problem areas or questions that need to be addressed in the next steps in the design process.

5 **Present (optional):** Using a storytelling approach, present your last iteration and key learnings to other stakeholders and gather feedback. It is often useful to also capture the presentation and the final feedback rounds on video and add them to your documentation.

Method notes

→ **Introduce an observer:** Try having at least one observer for each walkthrough to balance judgment and counter the bias of the active players. The observer takes an independent view of the resulting experience and gives feedback to the team.

→ **See it through:** Always force yourself to play a walkthrough all the way to the end. Especially in early iterations, ideas come in abundance and can disrupt the flow. To address that, ask everybody to write their ideas and reflections down and wait to discuss them at the next step. Otherwise, you will never see one idea through.

→ **Keep the flow:** Watch out for talking in the groups, as the method can quickly trigger deep discussions. Encourage the group to simulate their talking points instead by doing different versions.

→ **Avoid teleporting:** Watch out for teleporting. How did that person get here? How did that object get here? Where did they go afterwards?

→ **Handling too many bugs:** If the group are stuck with too many bugs, ask them to step back and do a brief brainstorming session to generate potential solutions. Then go back to simulating these solutions using the desktop walkthrough.

→ **Introduce a director:** If you have trouble in your group making decisions or juggling too many wildly different ideas, introduce the role of a director. Only the director can stop the walkthrough to discuss questions or make changes to the other actors. The changes or ideas are then played through. The learnings are documented. After a set number of iterations (e.g., 3–5), another member of the group gets to be director. ◂

A Simply moving figures around on the map and acting out the dialogue allows the design team to quickly simulate a service experience, test, and explore alternatives.

B The base of a walkthrough is an overview map that contains all the relevant locations of the service experience. If necessary, create a detailed stage plan for each of these locations.

C Overview plans help to keep track of interconnected locations across a wider geography.