

# REHEARSING DIGITAL SERVICES

Rehearsing digital services is a variant of investigative rehearsal that helps to prototype digital interfaces as if they were human conversations or interactions.

<b>Duration</b>	Varies with the depth and complexity of the service – from 20 minutes to a few hours
<b>Physical requirements</b>	A flexible, private space, furniture, whatever objects are at hand, a flipchart, a starting point
<b>Energy level</b>	High
<b>Researchers/Facilitators</b>	1 or more
<b>Participants</b>	3–7 per team
<b>Research techniques</b>	Use-it-yourself (autoethnography), participant observation, co-creative workshops
<b>Expected output</b>	Insights, ideas, often also more questions and hypotheses, raw video footage and photos

Theatrical methods like investigative rehearsal can be surprisingly useful for prototyping digital offerings. These techniques allow tech and UI experts to see beyond interface questions and discover other opportunities and alternatives for their projects. As a first prototype, even before sketching any wireframes, a rehearsal session is set up and a human plays the app or web page. Instead of thinking digitally, the scene is played as a conversation with a human friend or knowledgeable (invisible?) butler to see where the encounter goes. Only afterwards, the team considers how to digitize the experience. For example, a dating app can be rehearsed by one person playing a human matchmaker (or “genie in a bottle”) who interviews people, introduces them according to their interests, suggests a location for a date which suits both and responds to their reactions, or whispers in their ears on the date to suggest conversation topics. Similarly, a landing page can be simulated by a concierge asking, “What are you looking for?” and then evolving the conversation naturally. How might that affect your digital design?



Investigative rehearsal for digital services is a theatrical method to enable deep understanding and exploration of interaction patterns, behaviors, processes, and user motivations through iterative rehearsal sessions. Based on Forum Theater, it is a structured, full-body way to clarify the use context and emotional side of an experience and reveal practicalities around physical space, language, and tone of voice – insights which are then turned into exciting user interfaces within the digital arena.

This technique has also proven to be useful when prototyping with very technical teams. Some of those teams tend to think in flow charts or old interface patterns rather than considering the human side. Rehearsing digital services challenges them to step away from wireframes and technical aspects and play the app as a human conversation. It allows them to discover that their solution space is far wider than they might have initially thought, and they can often add much more value to the app in a second iteration based on the rehearsal.

## 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*.<sup>01</sup> For a newer team, you will need some time to create that mental and physical setting. Consider doing some warm-up activity and establish the Rules of Rehearsal to agree on how to work.
- 3 Find a starting point:** Choose a starting point – e.g., a raw idea, or some context based on user stories from research – and prepare props and a space. Then, quickly familiarize yourselves with the chosen story.

<sup>01</sup> See #TISDD chapter 10, *Facilitating workshops*, for more on safe space, and a detailed example of building safe space for an investigative rehearsal session.

### RULES OF REHEARSAL

Setting the stage for a successful rehearsal session.

- 1..... **Doing, not talking.**
- 2..... **Play seriously.**
- 3..... **Use what you have.**

## Step-by-step guide

### USE/RESEARCH

- 1 Watch:** Run through the story and have a human play the app or web page. Don't think digital – be a full human being, but one with superhuman access to knowledge and media, like a knowledgeable butler or “genie in a bottle.” Remember: Don't play a robot – be a full human being.
- 2 Understand:** Now ask the 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. The goal is a deeper understanding of what would happen on a physical, emotional,



and motivational level, if it was an inherently human interaction. Encourage participants to be specific. If they say, “I see the concierge being open and honest,” ask them, “How exactly is the concierge being open and honest? What is he doing which makes him seem open and honest?” Note the insights and move on – do not change the scene just yet. 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.

- 3 **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. 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.

- 4 **Digitize the experience:** After a few iterations, consider how you would digitize the experience. Ask the team to pick out key ideas from your documentation flipchart and start to sketch out the interfaces. For example, how can an app appear to be “open and honest”? Do a quick sharing round and capture your feedback.
- 5 **At all times, keep a concise list of bugs, insights, and ideas:** 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 insights, bugs, and new ideas/questions.
- 6 **Decide on a next scene and repeat:** After the current scene has been finished, revisit your original starting points and decide on which part to try next. Then go again. Stop 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, more intensive ideation, or switching to other prototyping methods.
- 7 **Document:** Document and finalize your work. Use paper prototyping, wireframes, interactive click-models, 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

- **Don't play a robot – be a full human being:** Especially at the start of a session, it is important to remind actors they're not trying to be a technical system. It can be helpful to remind them that between 20 and 50 years ago, any of the jobs you might discuss right now as part of an app would have been done by a human being. What would that human have done? How would she have behaved?
  - **Keep them focused and moving:** The facilitator will need to keep the team focused, moving, and honest. At the same time, he 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 he will often have to say, **"Please don't tell me, show me!"**
  - **Explorative or evaluative – studio or contextual:** The 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 for digital services can produce real and valid learnings to support your decision making.<sup>01</sup> ◀
- 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."

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