



smapply

SERVICE DESIGN MANUAL
VERSION 1.2 — 2016

- **PERSONAS**
- **STAKEHOLDER MAPS**
- **CUSTOMER JOURNEY MAPS**

VISUALIZE CUSTOMER EXPERIENCE

→ quick start guide

HI THERE!

This is a short guide introducing Personas, Journey Maps and Stakeholder Maps and how to create them with our web-based software Smaply.

For workshops, we provide free paper templates on our website – or if you prefer you can order them ready to work in our little online shop: **mrthinkr.com**

Oh, by the way: we call what we're doing service design, but there are many other names for the same/similar thing: design thinking, user experience design, customer experience design, cross-channel design, touchpoint management, and so on. Let's agree not to build new silos – let's work on breaking down silos in organizations and change the world we're living into the better ...

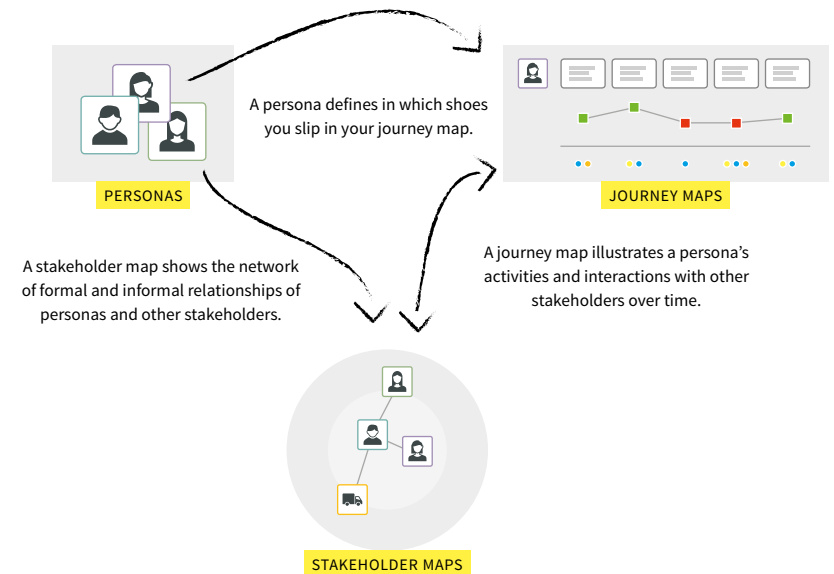
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- 03 Journey Maps
- 04 Stakeholder Maps
- 05 Project and User Management

Smaply does never replace real hands-on workshops and research, but it makes your work a lot faster and easier...

This is Smaply:

WORKING IN A SYSTEM OF PERSONAS, JOURNEY MAPS AND STAKEHOLDER MAPS



All these tools work hand in hand:

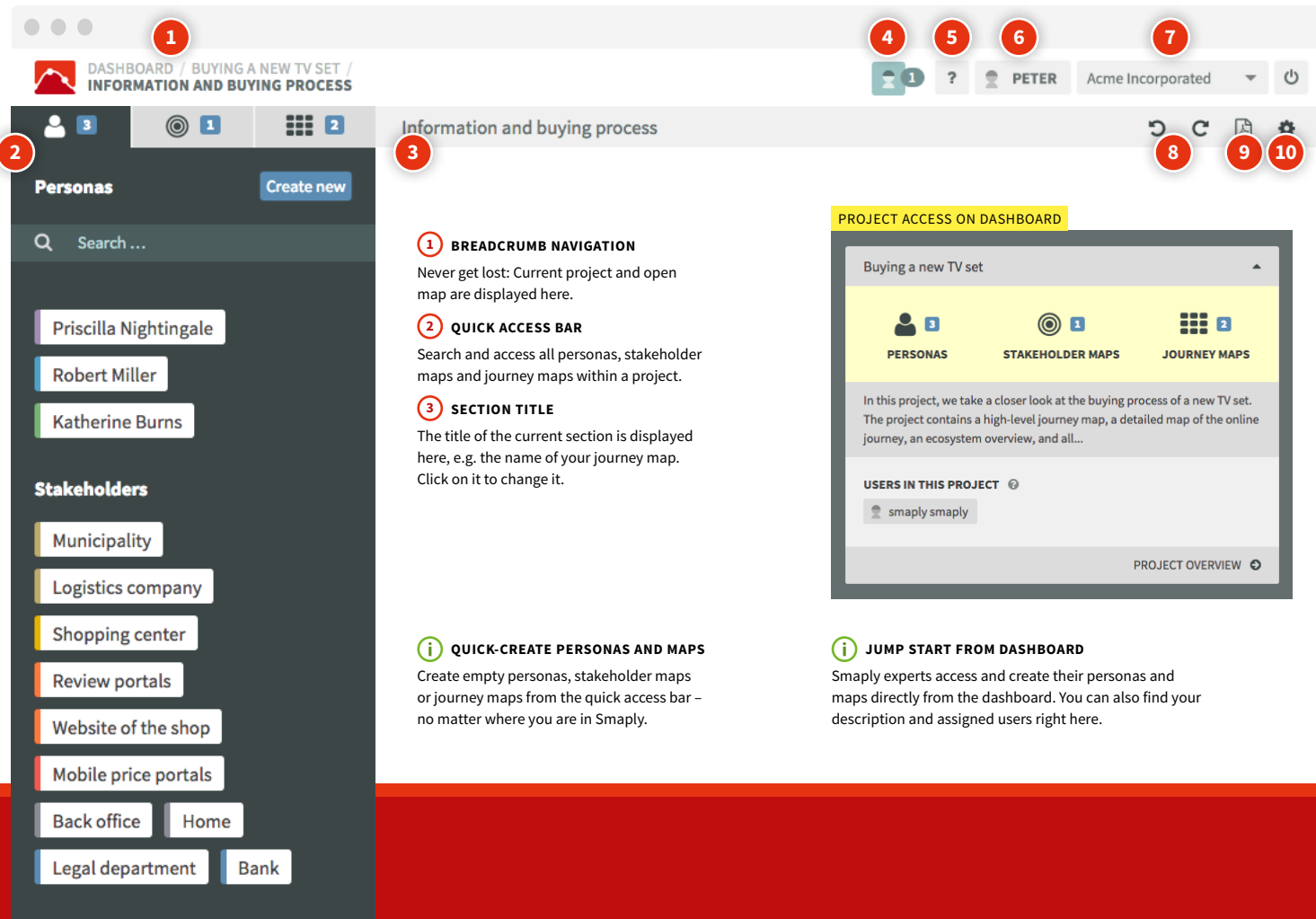
- ▶ **Personas** exemplify a group of people, such as a user groups, customer segments, employee types (*we only refer to customers in this guide, but it depends on the focus of a project*).
- ▶ **Journey maps** visualize the experience of a person or a group of people as a sequence of steps.
- ▶ **Stakeholder maps** reveal the ecosystem of people, organizations and things involved in a certain experience.

1 OVERVIEW

working in Smaply

Smaply is a web-based software to create professional personas, journey maps, and stakeholder maps in minutes. Make yourself familiar with the advanced tools at hand.

Smaply does never replace real hands-on workshops and research, but it does your work a lot faster and easier ...



1 BREADCRUMB NAVIGATION
Never get lost: Current project and open map are displayed here.

2 QUICK ACCESS BAR
Search and access all personas, stakeholder maps and journey maps within a project.

3 SECTION TITLE
The title of the current section is displayed here, e.g. the name of your journey map. Click on it to change it.

4 MULTI-USER INDICATION
See if your colleagues are looking at the currently opened section as well.

5 HELP CENTER
Click here to get some instant help. Never hesitate to contact us, we are here to help.

6 USER AND ACCOUNT SETTINGS
Click here access and change your account and billing data, to add/remove users, and to download your invoices.

7 ORGANIZATION SWITCH
If you are member of several organizations (e.g. client, agency, fellow agency), you can quickly switch between them without logging off and on.

8 UNDO AND REDO
Undo is possible in most cases. If you are performing an action that cannot be undone, such as your account settings, we ask you explicitly for confirmation.

9 PDF EXPORT
Click here to create a high resolution, vector based PDF export of the currently displayed persona or map.

10 SECTION ACTION
Perform actions for the complete section you are looking at, for example duplicate a complete or delete an entire journey map.

QUICK-CREATE PERSONAS AND MAPS
Create empty personas, stakeholder maps or journey maps from the quick access bar – no matter where you are in Smaply.

JUMP START FROM DASHBOARD
Smaply experts access and create their personas and maps directly from the dashboard. You can also find your description and assigned users right here.

2 PERSONAS

A persona is a rich description of one fictional person exemplifying a specific group of people. They help us achieve empathy, create better ideas and challenge them.

CREATE EMPATHY WITH YOUR USERS

Personas describe a group of people in a way that is easy to understand and empathize with. Describe both the person as a human being (background story, personality, interests, etc.) and as a stakeholder in context of a service ecosystem (needs, expectations, etc.).

DESIGN FOR PEOPLE – NOT SPREADSHEETS

Often personas are used to describe customer or user segments. Creating personas can lead to new insights who your customers really are and why they are using your products or services. Personas help to give a team a shared understanding of their customers and are a valuable basis for journey maps and stakeholder maps, as well as many other tools.

Every project in Smaply starts with a persona.

1 PORTRAIT IMAGE

Use an authentic photo that expresses your persona's character.
Hint: Celebrities are not helpful.

2 ICON AND COLOUR

For easy orientation on other tools, pick a matching icon and colour. The small stripes on the icon mark that this is a persona – other than a simple stakeholder with no further characteristics.

3 SHORT FACTS

Age and gender help to specify your persona further, initials are a short name for easy overview in complex maps.

4 NAME AND DEMOGRAPHICS

Choose a name that reflects your persona's heritage and social environment. Try to make it real – your team might have to live with this name for longer.

5 QUOTE

This could describe your persona's attitude in one sentence. Ask yourself: What would help team members to empathize with this fictional person?

6 DESCRIPTION

There is not one recipe to describe a persona. Use this field for further stories and characteristics. How does a typical day look like? What are favourite places to go? Add additional description fields as needed, such as past experiences, expectations, education, hobbies, etc.

7 MOOD IMAGES

Enrich your persona with contextual photos of their lives. How does their home or work place look like? What's in their purse? What are their hobbies?

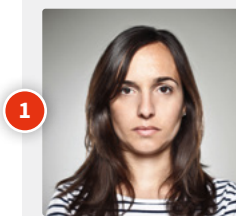


PERSONA (SMAPLY PDF EXPORT)

Buying a new TV set
PROJECT

Priscilla Nightingale
PERSONA

11 March 2016
DATE



INITIALS AGE
PRI 37

NAME
Priscilla Nightingale

OCCUPATION
Accountant at railway company

NATIONALITY
Spanish

MARITAL STATUS
Married, 1 son

QUOTE
"Relaxing on my couch ... watching TV all night sometimes just what I need."

DESCRIPTION
Priscilla is just that friendly mother next door. She has a **secure** job at the national railway company. Together with her husband, she has a monthly household income of **5,000 Euro net**. Priscilla loves to spend free time with her two boys. Marcus, her husband, loves **the outdoors**. Whenever possible, the couple take hiking tours with Josh, their 9-year-old son.
Priscilla is not very interested in technology. She wants things that just work.

PERSONAL INTERESTS AND HOBBIES
Pop music, cycling, outdoors, hiking, decorating her home, cooking, her husband, spending time with her son

THINGS SHE HATES
Complexity, rudeness, ruthlessness, spending too much time in the



PERSONAS

working in Smaply

Smaply enables you to keep a comprehensive database of your personas. Personas are the foundation for many other tools, like journey maps, and stakeholder maps.

E CONVERT EXISTING STAKEHOLDERS INTO PERSONAS

Click on stakeholders to see all stakeholders you've created in stakeholder maps and journey maps. You can convert them into personas here and add further details if you like.

Always base your personas on research data and not just assumptions.

No time for research? Create personas in a workshop with customers or employees that are in direct contact with customers every day.

PERSONA AND STAKEHOLDER EDITOR

ICON PICKER FOR PERSONAS AND STAKEHOLDERS



A CREATE A PERSONA

You can create new personas from ► persona side bar, ► quick access bar, ► project overview, or ► quick-create them in stakeholder and journey maps.

B FILL IN DETAILS

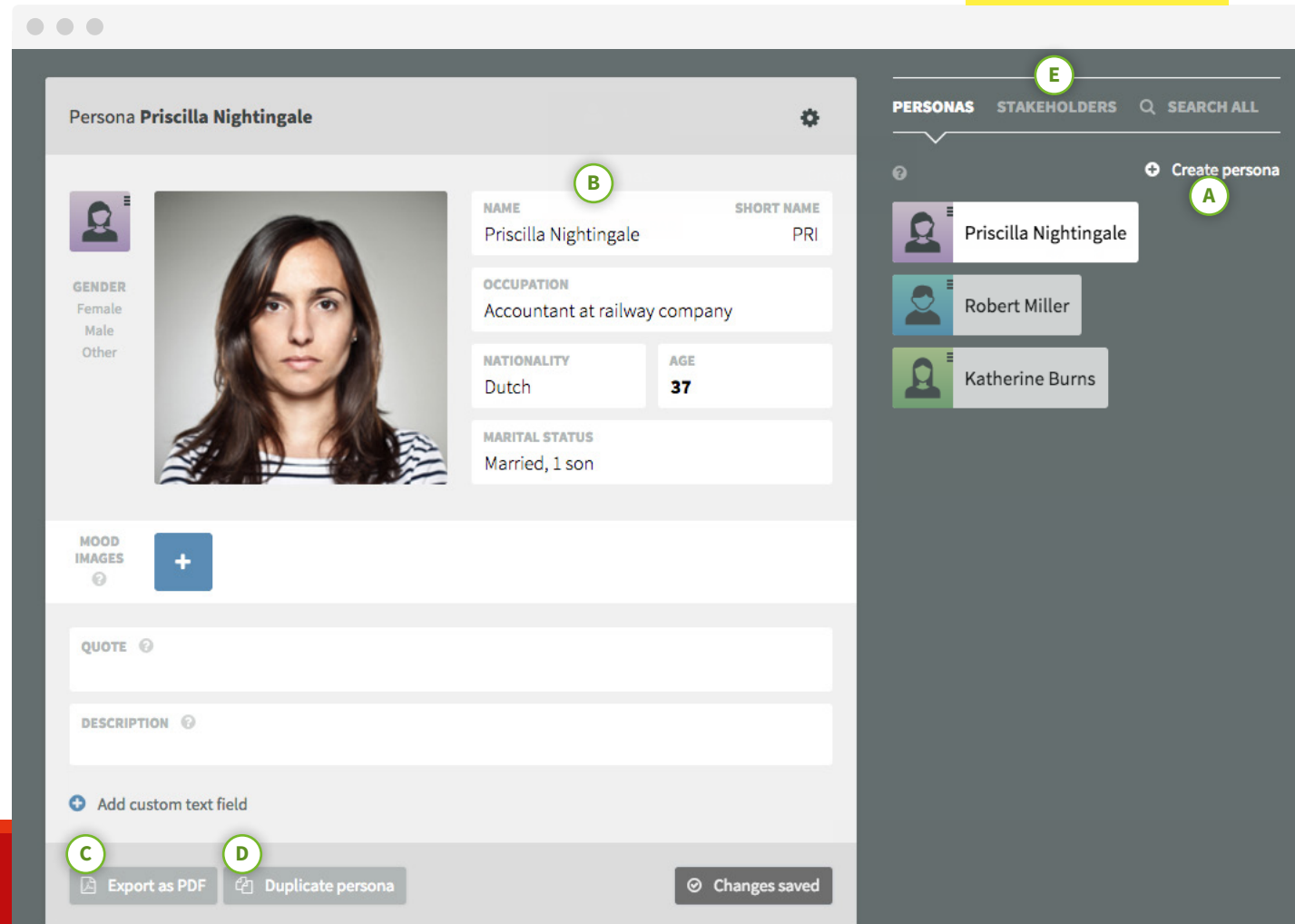
You decide how much information is needed for your project. Sometimes, a name and an icon is all you need to get started.

C CREATE YOUR FIRST EXPORT

Create a PDF of your persona with the export button at the bottom or in the menu bar. Print it out for workshops or share it by email with your team.

D DUPLICATE YOUR PERSONA

Use one persona as a template for others with a consistent structure for easy understanding.



The screenshot shows the 'Persona Priscilla Nightingale' editor. It includes a profile picture, a list of details (Name, Occupation, Nationality, Age, Marital Status), a quote field, a description field, and buttons for 'Export as PDF' and 'Duplicate persona'. A sidebar on the right shows a list of personas, including Priscilla Nightingale, Robert Miller, and Katherine Burns. A 'Create persona' button is also visible.

3 JOURNEY MAPS

Journey mapping is the visualization of experiences a user or customer has over time. Like a movie tells a story of an actor as a sequence of scenes, a journey map visualizes your persona's experiences as a sequence of steps.

MAKE CUSTOMER EXPERIENCE TANGIBLE

Mapping customer (or user, employee, etc.) experiences makes intangible interactions visible and facilitates a common and empathic understanding between all team members. As it also includes experiences beyond the reach of an organization, it connects the customer's perspective with the organization's view. Journey maps help to find and communicate customer experience gaps and explore potential solutions. They focus on concrete use cases (jobs-to-be-done) of certain customer groups (personas).

DESIGN EXPERIENCES – INSTEAD OF INTERNAL PROCESSES

Besides a journey maps's basic structure consisting of steps and stages, additional lanes such as storyboards or text lanes can be used to enrich the map and focus on specific topics. Furthermore, graphs like emotional journeys and dramatic arcs help to understand the customer's flow of satisfaction and engagement. Channel lanes help you to visualize which channel can be used in which step to visualize cross-channel experiences.

1 STAGES

Stages give a map structures, like: information, buying, set up, using, ...

2 STEPS AND TITLES

Each journey consists of a sequence of steps (activities, touchpoints, micro-interactions, etc). Give each step a short title summarizing your persona's experience and activity.

3 STORYBOARD

Real photos, screen shots, or other visuals are enormously helpful to tell your persona's story. Plus: others can navigate faster and empathize more with your persona.

4 EMOTIONAL JOURNEY

This simple graph illustrates your persona's satisfaction per step on a simple 5-point scale from -2 to +2.

5 CHANNEL LANE

Icons help to visualize the interaction channels your persona uses or could use for each step. Who is responsible for each channel? What can you influence?

6 TEXT LANE

Add additional information to describe your persona's experience even further. Think of different lanes for needs, KPIs, thinking and feeling, ideas, improvements, key learnings, opportunities, etc.

7 ADD MORE PERSONAS

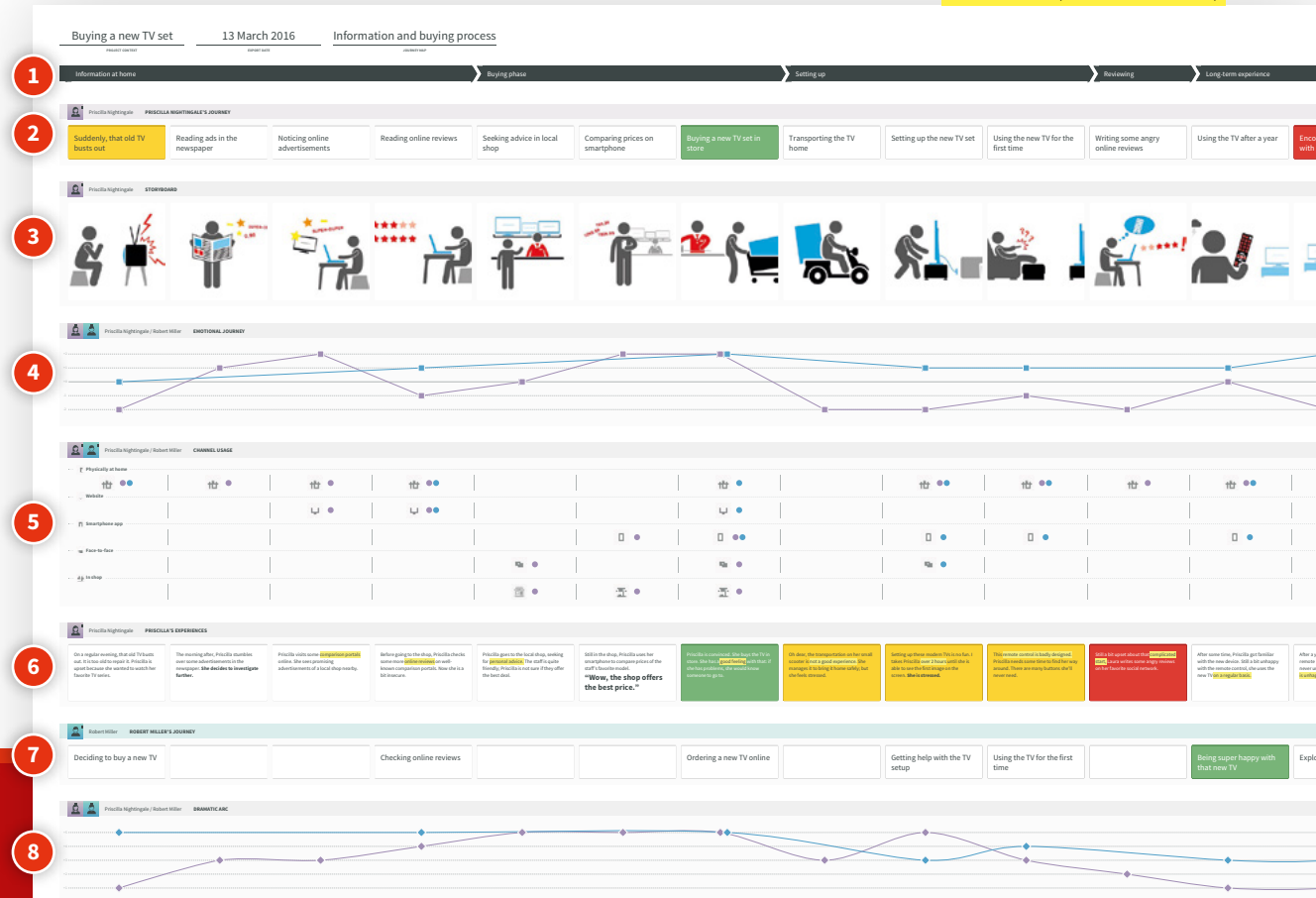
Add more personas to compare experiences, such as different customer groups or customer with employee experiences.

8 DRAMATIC ARC

Use a dramatic arc to show your persona's engagement (tension, drama, importance, etc.) per step on a 5-point scale from 1 (low) to 5 (high).

The value for each step does not represent a positive or negative experience, but rather illustrates the rhythm of an experience. When is a persona relaxed and when excited?

JOURNEY MAP (SMAPLY PDF EXPORT)



JOURNEY MAPS

working in Smaply

Smaply provides you with a powerful and flexible journey map editor for your customer journey maps, user journeys, employee journey maps, etc. You are able to create complex and rich CX visualizations in a very short time.

A ADD A PERSONA TO YOUR OUTLINE

Every empty journey map starts with a persona. For high-level journey maps without a dedicated persona, use quick-create to generate a dummy persona, such as "customer" or "user".

B ADD STAGES

Add and name stages to give your journey more structure. You can add/delete, divide/combine, and adjust their length by dragging their ends.

C DEFINE YOUR PERSONA'S STEPS

Describe your persona's story as a sequence of steps. Start with some short titles. Use the arrows to quickly move between steps.

D ENTER DATA DIRECTLY IN LANES

You can enter data directly in any lane. Just click where you would like to add or change something.

E ARRANGE YOUR JOURNEY MAP

Arrange the order of your lanes simply with drag'n'drop.

F HIDE/SHOW LANE

Hide lanes to exclude them on a PDF export. That data is still there and you can show them at any time again.

G RICH TEXT EDITOR

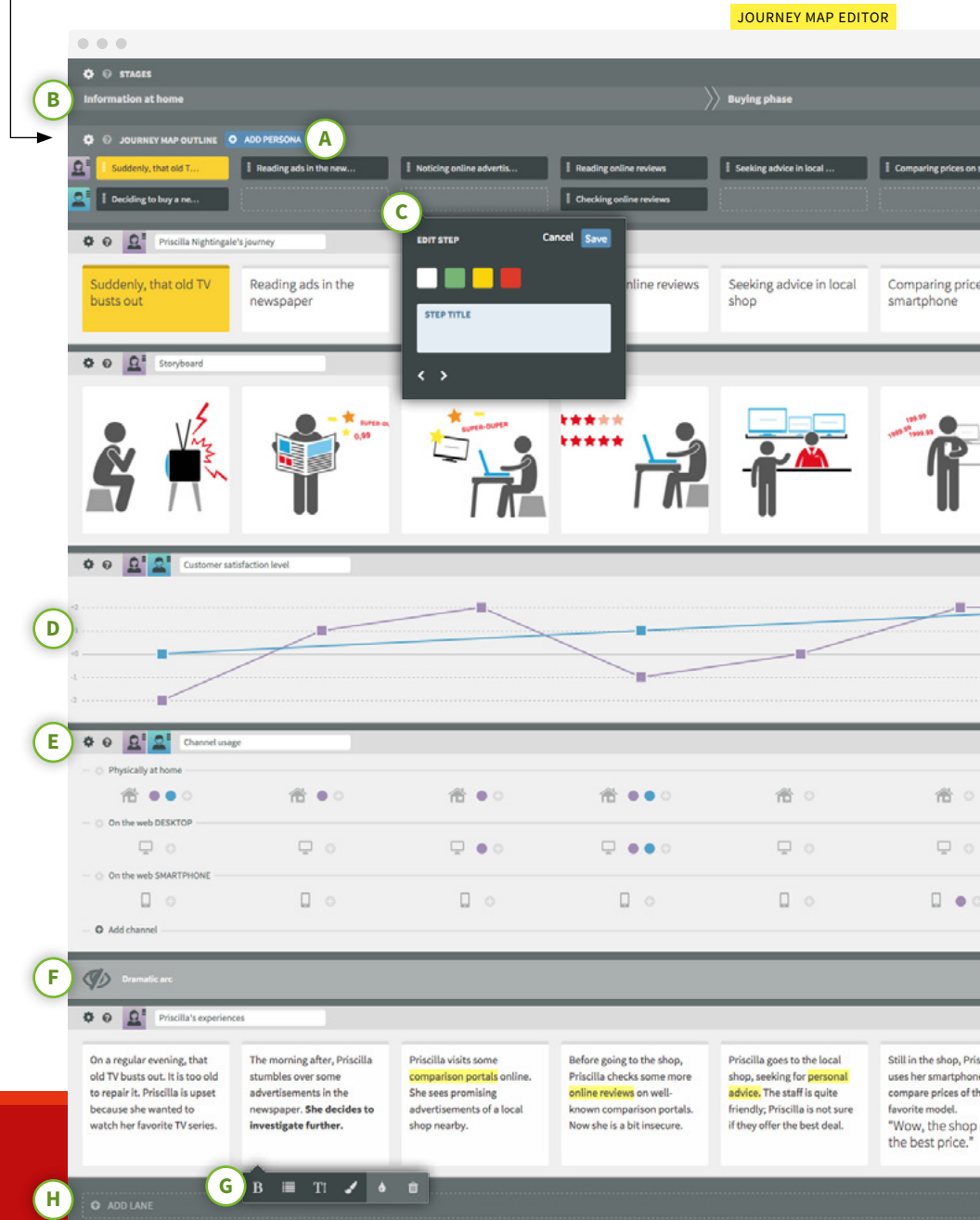
Use the rich text editor of text lanes to highlight important or unclear aspects.

H ADD LANES AS NEEDED

After filling out your journey outline, you want to add visualizations. What kind of lanes you want to add in what order is completely up to you. This way, you can tailor your journey map according to your project needs.

I USE THE JOURNEY MAP OUTLINE

The outline is your global overview and control device. Use it to structure your journey, to add/delete steps including all related data in every lane, or to add/delete gaps between steps. Click the cogwheel and the persona for even more functions.



The screenshot displays the Smaply Journey Map Editor interface. At the top right, a yellow tab reads "JOURNEY MAP EDITOR". The interface is divided into several sections. The top section, labeled "STAGES", shows a timeline with stages like "Information at home" and "Buying phase". Below this, the "JOURNEY MAP OUTLINE" section displays a sequence of steps for a persona named "Priscilla Nightingale's journey". An "EDIT STEP" dialog box is open, showing a color picker and a text input field. The "STORYBOARD" section below shows a sequence of icons representing different steps in the journey. The "CUSTOMER SATISFACTION LEVEL" section shows a line graph with data points. The "CHANNEL USAGE" section shows a timeline of channel usage across different devices (home, desktop, smartphone). The "Dramatic arc" section shows a line graph with data points. The "Priscilla's experiences" section shows a sequence of text boxes describing the customer's journey. Annotations A through H are placed on the interface to highlight specific features: A points to the "ADD PERSONA" button, B points to the "JOURNEY MAP OUTLINE" section, C points to the "EDIT STEP" dialog box, D points to the "CUSTOMER SATISFACTION LEVEL" section, E points to the "CHANNEL USAGE" section, F points to the "Dramatic arc" section, G points to the "ADD LANE" button, and H points to the "ADD LANE" button.

4 STAKEHOLDER MAPS

A stakeholder map visualizes the ecosystem in which a product or service operates from a specific perspective.

UNDERSTAND THE ECOSYSTEM OF YOUR PRODUCT OR SERVICE

Customers interact with many internal and external stakeholders during their journey: they use different products or services, various devices and platforms, communicate with diverse departments through different channels.

DESIGN SYSTEMS – INSTEAD OF DISCONNECTED PRODUCTS OR SERVICES

A stakeholder map is a visual representation of this ecosystem of stakeholders involved in a customer experience. It helps to understand who is involved, to reveal existing formal and informal relationships between stakeholders, to identify frictions between them, and to find new business opportunities by establishing new relationships, fostering existing ones, or creating alternatives.

1 STAKEHOLDERS (INCLUDING PERSONAS)

The main actors in your system can be freely arranged on this large circular map. Their position depends on what you want to visualize, but usually your customer should be in the centre – at least if you try to be a customer-centred organization.

2 RELATIONSHIPS

Stakeholders have certain relationships with each other. In many cases, a transaction or value exchange takes place between them. Use icons and text to illustrate this connection.

3 MAP LEGEND

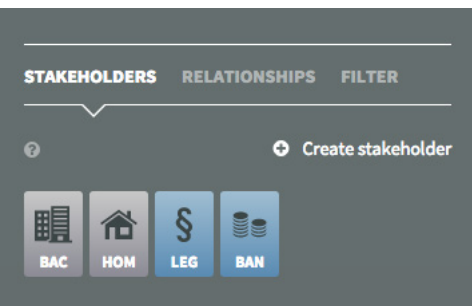
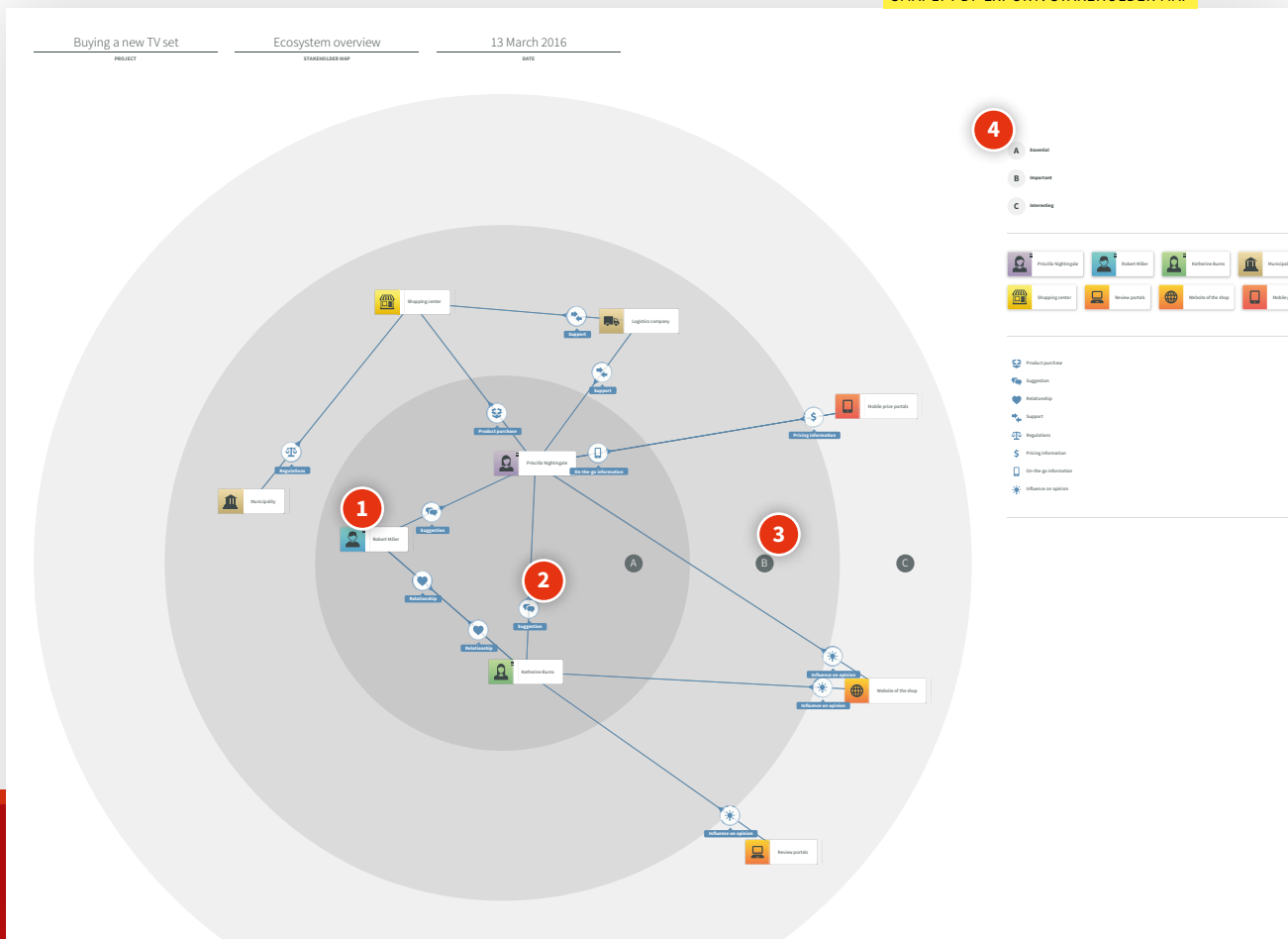
Define the meaning of the three circles. According to your project, this could be for example: essential/important/interesting or internal/external directly/external indirectly. Use whatever makes sense to structure your ecosystem.

4 SIDE BAR

These maps are intended for hanging on a wall for example in workshop settings. The side bar gives an overview of all stakeholders and relationships involved.

Personas are also stakeholders – they just have a more detailed description. You can always convert a stakeholder into a persona in Smaply and add more details if you like.

SMAPLY PDF EXPORT: STAKEHOLDER MAP



STAKEHOLDER MAPS

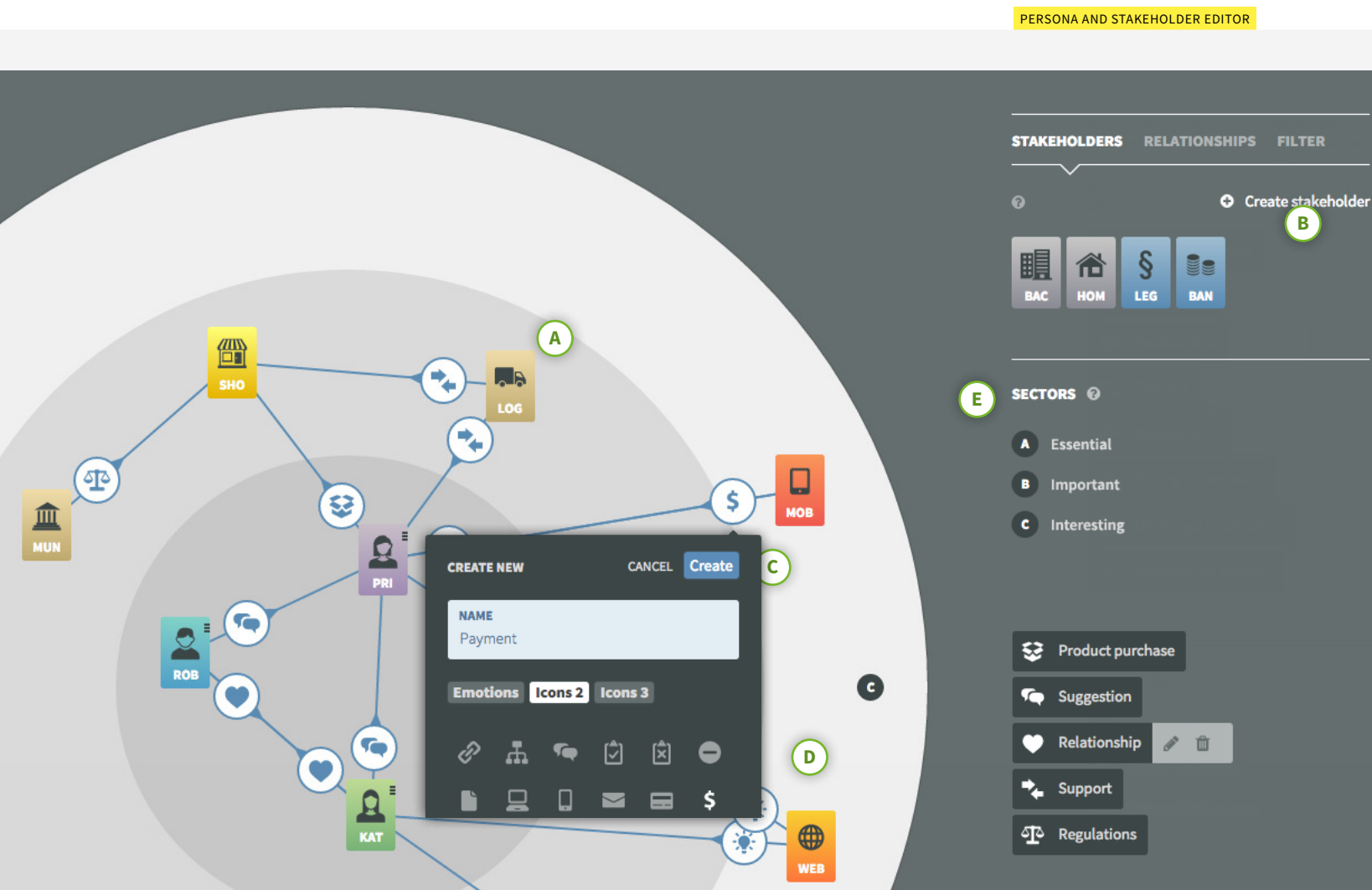
working in Smaply

Smaply enables you to quickly create comprehensive stakeholder maps. And it makes it even more easy to revise them over and over again as ecosystems change over time.

Do a workshop with many different stakeholders (including customers) to co-create a list of potentially relevant stakeholders.

In a second step, visualize them on a stakeholder map and dig deeper into the relationships between them.

Use a paper template for the workshop, then digitize the map afterwards with Smaply.



A ADD PERSONAS AND STAKEHOLDERS TO YOUR MAP

Simply drag and drop personas and stakeholders from the side bar onto your map. Arrange them freely on the map and drag them in the desired position. Just move them out of the map to remove them.

B CREATE ADDITIONAL STAKEHOLDERS

All personas of this project show up in this list of stakeholders. Use the button in the side bar to quickly create new stakeholders. You can convert them into personas at any time and enrich them with more details.

C DRAW RELATIONSHIPS

Click on one stakeholder on the map to draw a relationship to another. After creating a connection, the relationship editor pops up. Use it to create new types of relationships on the go, or assign existing ones.

D ARRANGE YOUR ITEMS AND EXPORT A PDF

After creating all elements you want to show, arrange your items in a reasonable way so they don't overlap too much. Use the PDF export button on the top right to check if it works on a large-scale export as well.

E NAME YOUR SECTORS

Define names for the three sectors, e.g. according to importance for customers from (A) essential, (B) important, to (C) interesting. Use whatever makes sense to structure the system you're visualizing.

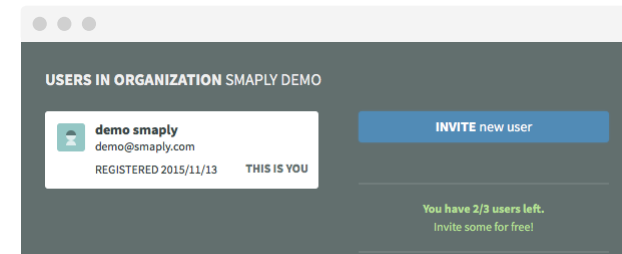
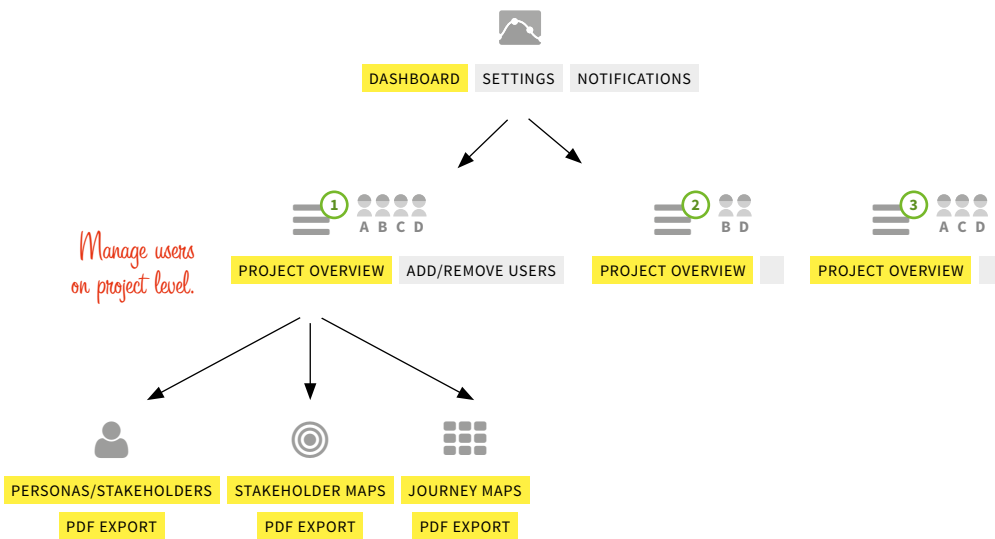
F DUPLICATE YOUR STAKEHOLDER MAP

Use the section action cogwheel in the upper right corner to duplicate (or delete) your stakeholder map. Use this to create different versions of a system to compare various options or to visualize different moments in time. It's also useful if you want to use one stakeholder map as a template for others using the same relationship types.

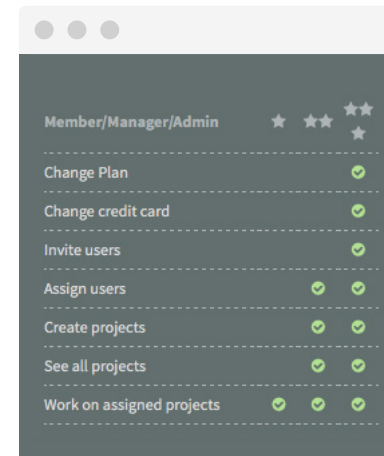
5 PROJECT AND USER MANAGEMENT

With Smaply you can handle multiple organizations, projects and users.

Each organization has individual settings, billing and multi-user management. An organization can have unlimited projects and you can assign different users to each project separately. Manage who has access to which project and even invite external stakeholders or your client to your project.



You can use the same user with the same log-in for different organizations. Use the organization handle at the top right to switch between the different organizations you are part of.



✓ INVITE USERS TO YOUR ORGANIZATION

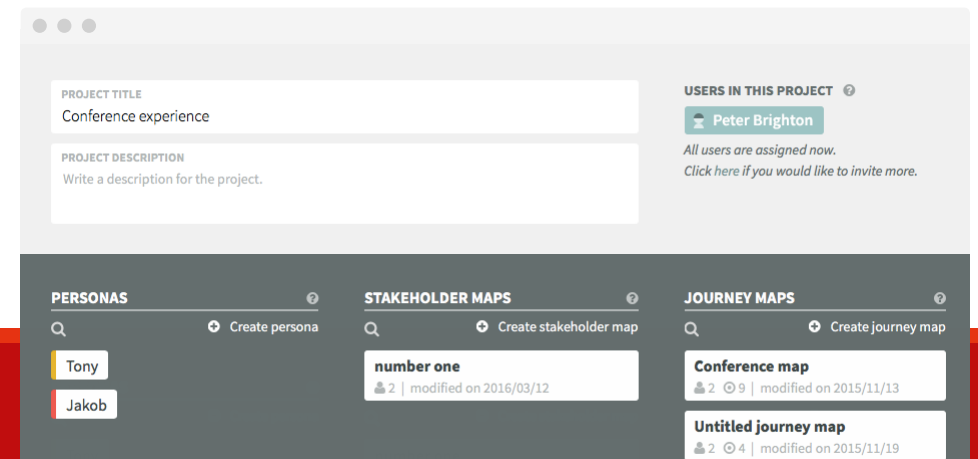
Go to user and account settings of your organization by clicking on your user name on the top right. There you can review your users in organization. Add additional users simply by inviting them with their email address. They immediately receive a confirmation link by email.

✓ DEFINE USER RIGHTS

Currently, you can choose between three user roles with different rights. Members can only work in projects they are assigned to. Managers can see all projects, create new ones and assign existing users to projects. The admin is the only one who can invite new users to an organization and handle everything related to the billing of an organization.

✓ ASSIGN USERS TO PROJECTS

In your project overview you can assign and unassign users to a project as soon as they have confirmed your invitation.





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**SMAPLY COMES FROM THE
PEOPLE BEHIND “THIS IS
SERVICE DESIGN THINKING” ...**



**... AND “THIS IS SERVICE
DESIGN DOING” (OUT 2016).**

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