



Blueprinting Facilitator Guide

Your step-by-step guide to running practical service blueprinting

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Introduction

This guide is a companion to our Guide to Practical Service Blueprinting from our website www.practicalservicedesign.com, so be sure to check that out before you dive in.

This facilitator guide gives you a detailed set of steps you can use to facilitate blueprinting sessions, and will go over how to prepare for and run the session.

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Preparing for the session

In this section we'll cover how to prepare for a successful practical service blueprinting session. Here are some quick checklists to get you started.

What You Will Need:

1-2 facilitators

6-15 key stakeholders

1.5-2 hours **per** scenario

A room with a big projector (or big walls)

Omnigraffle template (or butcher paper + stickies, markers)

Example Session Agenda:

5 minutes: Introduction to goals of the workshop

5 minutes: Overview of the scenario

10 minutes: Review step definitions

60 minutes: Blueprinting

5 minutes: (break)

25 minutes: Review blueprint

10 minutes: Identify next scenario and repeat -or- Finished!

Copy our more detailed example session agenda

online at www.practicalservicedesign.com/resources

Facilitators

Each session needs one or two facilitators. The role of the facilitator does not require advanced knowledge or extensive experience with service design or the blueprinting process—you can simply follow the guide and agenda.

Blueprinting Facilitator

The blueprint facilitator keeps the process moving and keeps the group focused on the steps and providing the needed detail. The role is all about inquiring and listening.

Subject Matter Facilitator

The subject matter facilitator knows the scenario and keeps the group on target. They know enough about the “knowns and unknowns” to prompt the group for additional information critical to the blueprint. This is typically the project driver.

Someone to Build

Building the blueprint digitally requires someone do it on the computer as you go; doing it with paper can be more of a group project. This can be a facilitator, or a separate “scribe”.

One or Two Facilitators?

The blueprinting facilitator and the subject matter facilitator can be the same person. However, it is very difficult to keep the blueprint session moving forward without a subject matter facilitator keeping the group on relevant areas of exploration.

The Working Session Group

The blueprinting group members are there to represent the scenario itself. If the scenario involves marketing, product development, finance regulations, customer support, and engineering, then a knowledgeable representative from those groups would be strongly encouraged to be there.

Most blueprinting session should have between **6-15 people**. Fewer than that and you're probably omitting big important pieces; more than that and the conversation becomes unwieldy.

Preparing Your Scenarios

As outlined in the Practical Service Blueprinting guide, your scenario use cases should be prepared at the high level—at the least, outlined step-by-step in a document, and ideally mapped out as the top layer of your blueprint template before the session. It is possible to assemble the scenario step definitions during the working session, but takes a considerable amount of time to do so, and is best done ahead of time with your subject matter facilitator.

Time and Space

You'll want to reserve a room that can accommodate all members of your working session and also have a large projector (if you are running your session digitally, which we highly recommend), or enough wall space to allow for the blueprint (if you are running your session physically).

Blueprinting can take **1.5-2 hours** for **each** moderately complex scenario. Additional scenarios in the same opportunity space will often be shorter since there is overlap and redundancy with the previous blueprints. On average, plan on reserving **1 hour** of focused work per additional blueprint.

Templates

We recommend using digital software, such as Omnigraffle to build the blueprint in real-time. Use a projector to show changes you are making in real-time. Get templates, examples and tutorial videos on using our digital template online at www.practicalservicedesign.com/resources.

If instead you want to do a hands-on working session, you will need: A large surface (paper roll or foamcore board), printouts for each step, different colored sticky notes for each type of layer preferably, and a color key. Examples available at our resources page above.

Running the session

For each scenario you are blueprinting, follow the steps below. As the facilitator, you will be the one creating the blueprint in the template file, while the subject matter facilitator prompts and probes the group through discussion.

1. Get group on the same page

Review the scenario with the group, going over the high level description ensuring everyone understands the use case.

2. Run through scenario

Quickly go through each of the step definitions from start to finish so the group can hear the scenario in its entirety.

3. Start making your blueprint

Starting with the first step, the facilitator prompts the group to provide the information for each layer type. Example: "What actors are present in this step?" or "Are there any systems that support this step?" etc.

4. March across the columns

Move from step to step, filling in layers (see page 6), prompting the group along the way to add their information. Use the layer

types as a checklist of sorts. When there doesn't seem to be any pertinent information left to add, move on to the next step definition.

5. Run through scenario again to validate

Once the scenario has been fleshed out to a reasonable degree, go back and read through it with the details now added to look for overlooked pieces, ideas, and critical moments.

6. Move on to the next scenario

When the scenario feels like it has documented the end-to-end, surface-to-core picture, you can then move on to the next scenario use case until you have all the scenarios you wanted to blueprint completed for this session.

Top-to-Bottom or Left-to-Right?

You can fill in your blueprint a column at a time, working top-down through each step, or you can work left-right by filling in one layer style at a time, i.e. filling in all actors first, then filling in all systems, etc.

See the example video at <http://www.practicalservicedesign.com/omnigraffle-blueprinting-tutorial>

After the Session

Once you are finished with your scenario blueprinting, the next step is to pull out your insights. The Practical Service Blueprinting guide phases 4-6 are what come next, where you do the following:

1. Collect all critical moments and ideas

Take your critical moments and ideas out of your blueprint format, and get them all in one place. For this work, you can do physical card sorting, a spreadsheet, a ticketing system—whatever method works for you and your team.

2. Group into themes

We suggest physical sorting as the quickest way to engage a group of stakeholders in grouping insights. Once you create groups, name them. These will be your overarching themes.

3. Identify strategic and tactical fixes

Within each theme, you are looking for larger strategic directions that might shift the vision of the service, as well as tactical fixes—things you can just go do now.

Following through on the output is the purpose of blueprinting, and how you'll make an impact on your organization.

Join the Community

Join the growing virtual community of practice for service designers around the globe on Slack. We believe the best way to grow our craft is together, through practice. We hope this facilitator guide has been a helpful tool in running practical service blueprinting.

We'd love to hear how it went! Join the #blueprinting channel in the Slack and ask questions or make comments to the creators of this format.

Join the community today:

<http://www.practicalservicedesign.com/community>



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