Intro to Digital

For Municipal Leaders

Module C: Design and Deliver

Perry Group Consulting Ltd.

Thanks for coming back
and giving up your time to
be here

Logistics

- Lots to pack in – we are going to go fast (again)

- 3-hour session – presentation, a few brainstorms and group discussions throughout (jot down questions and we can come back to them)

- 2 x 10-minute breaks. 1 every hour 😀

- Slides shared in the chat – grab your own copy if you want to notate
  - https://www.perrygroupconsulting.ca/digital-academy

- We are recording the session for those that can't make it

Key Takeaways – Module A

- High digital adoption rates for digital services (92% online, 88% banking, 80% for City online services)
- Digital – not if, but when.
- The time is now – COVID as a tipping point
- Own your service and its delivery mode
- Focus on the customer / listen to their needs and expectations
- Design your service for your customer

Key Takeaways – Module B

- Understand your starting point – Establish a baseline for your services
- Scan the landscape – learn from other municipalities and the industry; listen to citizens and your staff to get feedback on these services
- Identify opportunities – identify and prioritize opportunities for change
- Strategy and Planning – set direction for your business transformation and develop a roadmap considering your resources and priorities
- Get organized – establish the service owner as the leader of the digital transformation, use PM best practice
- Bring the right people (partners, staff) with you – up the mountain

Reflecting

- Did you have any reflections on what we discussed last time?

- Anything that came to you after the session that is worth discussing?

- Any questions you wanted to raise?

Today's Topics

Module C – Session Goals

- Designing and delivering digital services
- Revisiting Good Services
- Using the Ontario Digital Service Standard
- Intro to Agile Project Management
- Overview of BPO
- Overview of Journey Mapping

Before We Get Started

Good Services are the foundation for good digital services

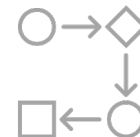# Designing Good Digital Services

The goal is to co-design with Product/Service Owners

A strong focus on user experience

An end-to-end service that meets the digital service standard

A lean back-office process

Use of repeatable service patterns

Pattern	Pattern Description
Apply for something	Enables the user to complete an application process. In most cases, this pattern is linked with a "Check" pattern to assess the eligibility (e.g., is the user being asked to submit a type of application to complete a task?).
Book something	Enables the user to book things such as a course, appointment, a room, an item, or a person's time. In most cases, a specific date and time need to be selected.
Check something	Enables a person who needs to understand if it applies to them or helps them find something (e.g., the status of something, the closest location, or their eligibility to a service).
Consent or Authorize	Enables the user to provide consent to something such as sharing data within the organization, with a 3rd party, or with the CRA. Provide approval, or acknowledgement on the use of personal information and acceptance of the process.
Get Information	Find information (read text on website, access a knowledgebase article, watch a video, listen to audio, download a document or a guide) about services or a service, when to use, how to use, requirements to use, communicate expectations of use.
Get Notified	Receive an alert / notification / reminder / prompt about something.
Internal Workflow	Enables staff (including municipality, contractor, partners) to handle requests, cases, manage processes and workflows, and secure approvals and signoffs.
Pay for something	Enables the user to complete a monetary transaction toward the Municipality.
Register for something	Enables the user to complete a process (like booking something). By registering, users will create an account with personal and sensitive data that they can return to.
Request something	Enables the user to ask for something specific in order to get to some tangible outcomes (e.g., a copy of a certificate, a pass or a record digitized). May be linked to Pay for something pattern.
Tell us something	Enables a person who needs/wants to give some information to the Municipality, like a referral or to report something.

What is Service Design?

"Service design identifies problems and opportunities for the people using the service and the people delivering it and works out the best solution."

Service Design Playbook

Ontario

Understanding the people who will use a service helps to create solutions that work for them.

Service design engages users throughout the design process so that decisions are made using observations and evidence, not assumptions.

Benefits of Service Design

Governments all over the world have learned that service design can:

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- **Reduce risk –** Early and ongoing feedback checks that a service works well for its users
- **Save money -** By making small adjustments throughout a project instead of big changes later
- **Solve the right problems -** Investigating user issues before development focuses efforts on designing a service that meets people's needs, as well as policy goals.

Principles of Good Service Design

A good service:

1. is easy to find
2. clearly explains its purpose
3. sets the expectations a user has of it
4. enables a user to complete the outcome they set out to do
5. works in a way that is familiar
6. requires no prior knowledge to use
7. is agnostic to organizational structures
8. requires as few steps as possible to complete
9. is consistent throughout
10. is useable by everyone equally
11. should have no dead ends
12. encourages the right behaviours from users and staff
13. should respond to change quickly
14. clearly explains why a decision has been made
15. makes it easy to get human assistance

Good Services

Lou Downe

The Good Services Assessment

Good.Services offers a free assessment tool online:

[The Good Services Scale](#)

Building Good Service Design Capabilities

- Read the book – Good Services
  - Buy the book for your team
  - Start a book club to connect with other service owners at the City

- Read the blog

- Watch a Making Tech Better podcast with the author Lou Downe

- Formal Training is available from The School of Good Services - https://good.services/
  - Public, private and organizational training is available

1. Build a Coalition

- Establish a coalition of key players to help you formulate the approach, and to guide, coordinate, and communicate the vision.

2. Identify the opportunities

- Learn from others (municipalities)
- Understand the art of the possible – scan the marketplace
- Identify services, define profile and current performance
- Talk to customers

3. Form a Vision, Identify Initiatives

- Collectively define and communicate how the future will be different from the past and how you will make that future a reality through initiatives linked directly to the vision.
- Identify key initiatives (backlog) + set out strategy

4. Build Buy In and Urgency

- Help others (in your team, across the organization) see the need for change
- Bring everyone up the mountain

5. Build the Team

- Dedicate the right resources
- Build a multi-disciplinary team – project lead, analyst, developer
- Co-locate if possible
- Identify key change agents that will help communicate/sell the change

6. Remove Barriers

- Protect the team
- Remove barriers, empower the team to work across silos, to challenge existing practices, and to generate real impact.
- Design the future

7. Short Term Wins

- Implement quick, initial wins that form part of the bigger story.
- Launch, learn and improve
- Recognize, communicate and celebrate successes early and often – to energize the team to persist.

8. Sustain Acceleration

- Build momentum
- Press harder after the first successes.
- Be relentless with initiating change after change until the vision is a reality.

9. Embed Change and Iterate

- Articulate and reinforce new behaviors, making sure they continue until they become strong enough to replace old habits.
- Update Job Descriptions to reflect new mode of operating
- Iteratively improve the product / service

Short Term Win(s)

Service	Digitized	Digital	Service Complexity	# of Annual Transactions	% of total transactions	# of Calls / Complaints	# of Web Searches	# of Web Visits
Service 1	3	1	Low	10,000	87%	2,000	10,000	100,000
Service 2	2	1	High	50	0.5%	50	500	5,000
Service 3	2	2	Med	150	1.3%	25	500	2,000
Service 4	4	4	Med	1,200	10%	25	500	5,000

- Pick something simple, small, but impactful
- A known problem that you can test the approach on
- Outside of the glare of attention

Pick a "Quick Win" Service

- Think of one of your own services that might fit the bill

- What did you pick, why did you pick it?

Keep it in your mind as we
walk through the rest
of the session

Ontario Public Service's Approach to Building Digital Services

The Design Approach
Design and delivery stages used by Ontario Government

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Discovery → Alpha → Beta → Live

Design used to be the seasoning you'd sprinkle on for taste, now it's the flour you need at the start of the recipe.

John Maeda

Discovery

Discovery > Alpha > Beta > Live

- Discovery helps define a service's potential users and how their needs can be met.

- In discovery:
  - conduct user research
  - decide who the primary user groups will be
  - learn about the people who will use the service
  - ask users what they want in a service
  - check if there are existing or non-governmental services that meet user needs
  - identify policies and other barriers that will make meeting user needs difficult
  - document the findings

Alpha

Discovery > Alpha > Beta > Live

- The Alpha stage is all about testing hypotheses and experimentation.

- The purpose of alpha is to determine how to meet the user needs that were identified in discovery.

- It's an opportunity to quickly test many different approaches with users before building a service.

Alpha

Simple paper sketches

Wireframes that may illustrate functions

Simple ways of communicating ideas, building a common understanding for the team

Show to users, get feedback
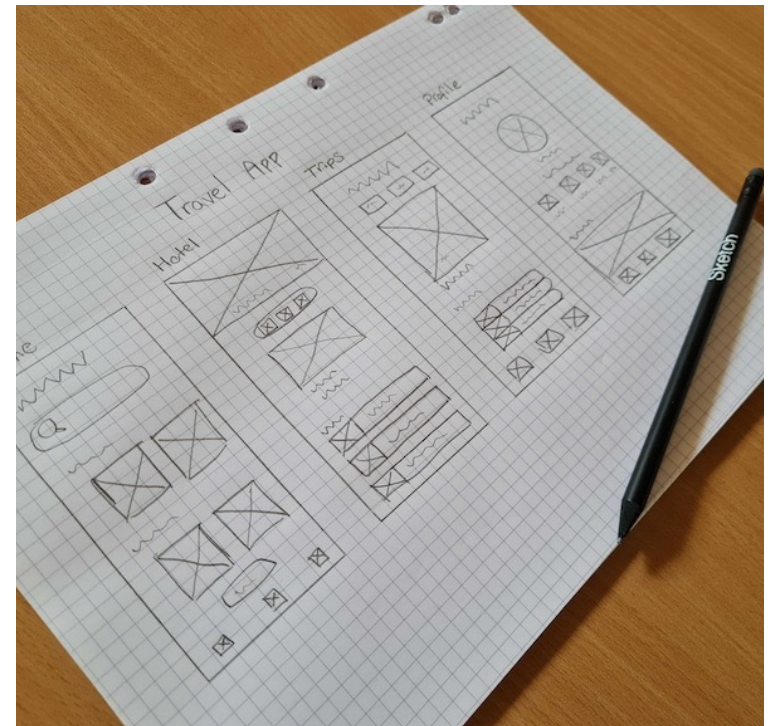
Prototype

Low-cost digital mockups / development that tests:

• Concepts

• User experience

• User interest or desirability

Helps stakeholders visualize ideas

Keep it simple

Reduce risk – fail fast & early

Beta

Discovery > Alpha > Beta > Live

- Beta is when the service starts coming to life.
- The goal of beta is to build a real service that works well for a larger group of people.
- The prototypes that were developed and tested during alpha are used to build a minimum viable product in a live, user-facing environment.

MVP

Minimum Viable Product

- Limited to the core functionality or idea of a product that is developed to a point that it can be tested by users to provide meaningful feedback

- Unlikely to deal with edge cases, complexities – 80:20 rule

- That's OK, because you will come to work on this more in future

Beta is not …

- … about perfection, it's about progress – don't delay, launch

"Perfect is the enemy of good"

Voltaire

Beta

- Build quickly and in small segments, taking the time to confirm that each segment of the service is on the right track.

- Launching a public service is the ultimate usability test, as it collects real data and user feedback.

- Feedback is used to refine the service, adding and adjusting features until the service is complete.

Live

Discovery › Alpha › Beta › Live

- Live begins when the service has reached a point of maturity and all of the main features in the backlog have been built. While most people understand the purpose of live, it's not always given the attention and resources it deserves.

- Without proper resources devoted to live, services become quickly outdated and fail to meet both the Digital Service Standard and user needs.

- Continuous improvement is one of the core principles of service design and that's what live is all about.

Digital Delivery: Going Live

Live is not "keeping the lights on" – it's about continuous improvement. Once Live, we:

- monitor and track the status of the service and key performance indicators
- conduct ongoing user research and usability testing
- communicate and celebrate the successes of the service
- ensure the service continues to meet the Digital Service Standard
- Iterate, iterate, iterate - continue building features from the backlog and releasing improvements to the service

Projects

- Think about the best project you've been involved in during your career.

- What was it and what were a few of the characteristics that made it "good"?

Characteristics

- Common goal / challenge
- Clear outcomes (defect reduction, new product, savings, better customer experience, move)
- Cross functional groups – diversity of perspectives
- Collaboration across organizations – partners, government, etc.
- Dedicated personnel
- Involving customers
- Product mindset
- Breaking new ground – exciting!

Digital Service Standard

Best Practices / Conventions for Designing and Implementing Good Digital Services

vs. personal preferences and opinions

1. Understand users and their needs

2. Establish the right team

3. Be consistent

4. Design the service from start to finish

5. Ensure users succeed the first time

6. Test the end-to-end service

7. Make it accessible and inclusive

8. Be agile and user-centred

9. Use open standards and common platforms

10. Embed privacy and security by design

11. Support those who need it

12. Measure performance

13. Be a good data steward

Ontario

Start

with user needs

www.gov.uk/design-principles

Government Design Principles

1 Start with user needs
2 Do less
3 Design with data
4 Do the hard work to make it simple
5 Iterate. Then iterate again

6 This is for everyone
7 Understand context
8 Build digital services, not websites
9 Be consistent, not uniform
10 Make things open: it makes things better

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👑 **GOV.UK**

Digital Service Standard #1:

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Understand users and their needs

Start with users to define the problem. Do research to develop a deep understanding of who the users are, how they behave and what that means for the design of the service or product. Include people with diverse or unique needs.

At a minimum:

- list all your user groups and their needs and expectations, and give examples of user personas for the online service

- have a user research plan (frequency, objective, etc) spanning every stage of service design and delivery, and demonstrate how often you will use research, testing and analytics to improve the service or product regularly or continuously

- observe user behaviour in testing to improve your understanding of users and their needs, and identify areas users find difficult and any problems that need to be overcome

- use analytics data in user research and service improvements planning

You're almost always wrong about your users

Understanding the User

- Your experience of your service is not your users

- You come with lots of baggage that your customer doesn't
  - Language / terms
  - Service and process knowledge
  - Experience / education

YOU ≠ USER

Understanding Users

- The first step in service design is to learn about the people that will be using the service.

- The only reliable way to do this is through first-hand research.

- When doing user research, be prepared to confidently explain the research methods being used and respect the [privacy and anonymity of participants.](#)

Why use the term **User**

- Organizations struggle with terms to refer to users of their services:
  - Resident, citizen, constituent, customer, etc.

- Service Design has co-opted the term User as being representative of any user of a service

- The term can also be easily applied to staff as users of internal services, to partners, to other agencies, etc.

- Putting the user first (central to our design of a service) is critical

Discovery: User Research

User assessments

User research

User Co-design

USER ENGAGEMENT
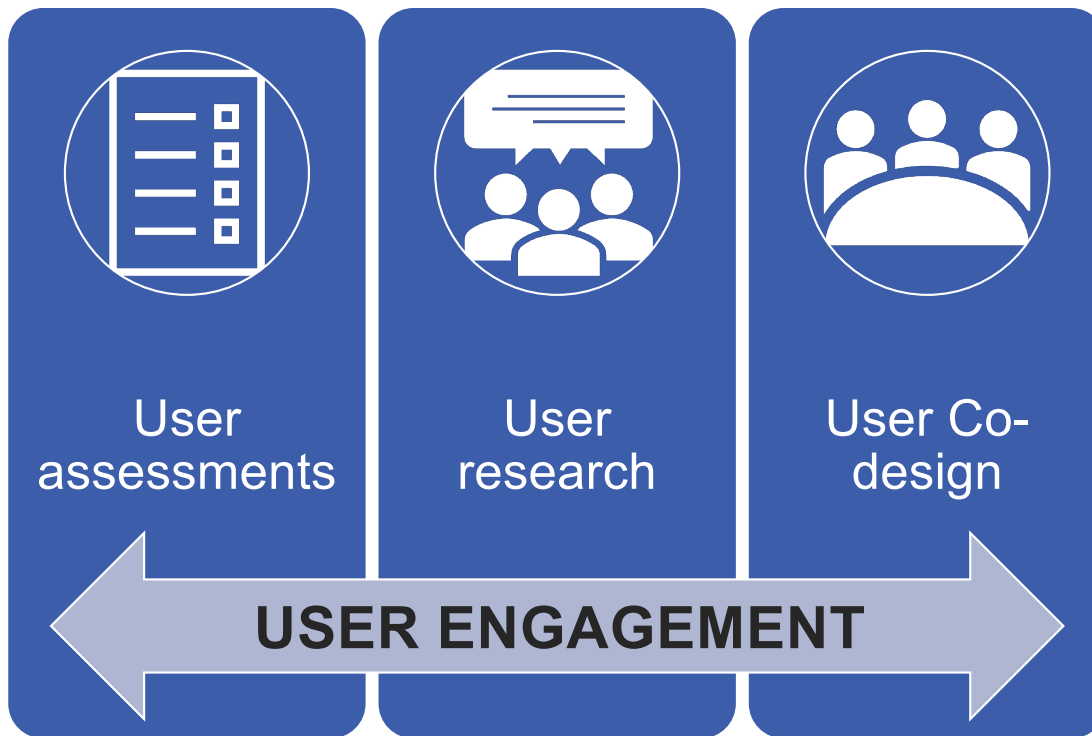
User research methods range from designing *for* users to designing *with* users.

Journey Mapping

Journey mapping can be done via customer interviews or workshops.

- The interviewer/facilitator works with the users to identify what they had to do, how they felt and where the experience could be improved.

- Unlike user testing, this is designed to explore the customer experience - so start where it started for them, and don't end until they have accomplished their goal.

- Using the journey map, you can connect the customer experience to the business processes in the to-be design phase.

A journey map describes the customer experience with your service. It outlines the steps they did/must take, and how. It identifies pain points, and opportunities for improvement.

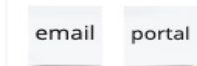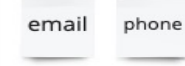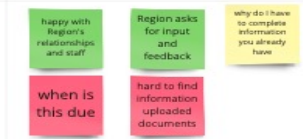| Phase of journey	Stage 1 - Apply for funding								Stage 2 - Application processing		Stage 3 - Funding receipt (1st line) and reporting (2nd line)					
Actions – What does the customer do?	receives email from Region (admin)	Logs in to portal	Goes to downloads	Downloads application template	Completes application	Logs in to portal	Goes to uploads	uploads application	Checks to make sure application is in uploads section	RoW will email if there are issues	Receives email from RoW	Logs in to portal	Checks downloads area for funding letter	receives funds		
											Receives email from RoW	Logs in to portal	downloads report template	completes report	logs in to portal	uploads report
Channel – What channel does the customer interact with?	email	portal				phone			email	phone	email	portal				
Customer Thought – What is the customer thinking?	there is $$ available	Zoom meetings are very helpful	The application is so difficult	application is hard when there are multiple centres	application is hard when there are multiple centres	Why do I need to give you info you already have?	application contains lots of duplicate fields		what is happening	Region staff is great at helping with issues	happy with Region's relationships and staff	Region asks for input and feedback	why do I have to complete information you already have			
	When is this due?	I/staff missed the email	uploaded new user list, but mailing lists not updated	portal navigation is confusing	timelines are sometimes tight	why is the site so slow?				region staff contacts are easy to find	when is this due	hard to find information uploaded documents				
Customer Feeling – What is the customer feeling?	🤔 🙂								😐		🤔 🙂					
Process ownership – Who is in the lead on this?	Childrens Services				update each department when there are staff changes				Childrens Services		Childrens Services					
Issues/Concerns	user list/access is hard to manage	email lists aren't always accurate - have to make sure right staff got it	application information cannot be cut and pasted	have to keep local and shared files on computer	need file search capabilities (i.e. type, date)	have to rekey information every time			No updates	sometimes upload new document, sometimes region updates their side (but then that application doesn't match)	reports templates generalized	Have to find info from application, letter to complete	cannot organize files or search			
Opportunities	Calendar/Planner with funding dates, milestones, reporting	online application with preloaded info, ability to save, share with staff, manage approval workflow, and submit	Preload information Region already has	manage users, tasks, workflow from portal	manage notifications from portal (email/ mailing list)	notification when submitted	personalized notifications when eligible for funding	Show all open applications by category	Ability to download copy of submitted applications	Status updates (received, processing, etc)	make updates/ corrections into portal directly	Show all pending applications by category's status	Calendar with payment and reporting dates	preload report with info Region already has (application, previous data)	Ability to run a report on set of activities (i.e. all funding by year, etc)	

Personas vs User Interviews

YOU ≠ USER

- While direct user research is preferred, exploring the needs of specific user types is not always possible. In this case, user personas are used to create empathy, and can help the team look at the service from a different perspective.

- User personas are fictional representations of user types that may use your service. Ideally, they are created using data (i.e. demographics) or observational research.

User Persona example: Working Parent

About:

Greg is an 32 year old accountant who runs his small business from his home. He often has to juggle child care duties and work duties throughout his day. He and his partner own their home, and one car for the family.

Goals:

Greg prefers to do all his interactions online 24/7, working around his busy parenting and working schedule.

Frustrations:

He doesn't often have the car as his partner commutes to work, so is frustrated when he has to go into a physical location to complete tasks.

He has to be available to his clients, so finds it difficult to call a call centre when he needs service or service statuses.

Social/Online Behaviour:

Greg uses Twitter and LinkedIn. He is an Amazon Prime member and does most of his grocery shopping online with delivery. He researches extensively before buying.

Reminder: Applies to Internal Services

All these ideas apply equally to internal services / software solutions

- Timesheet / Leave Request
- Expense Claim
- Parking Pass Request
- Facilities Request

- Make sure you know who the real users of every service are
- Talk to them, understand their needs

Digital Service Standard #2:

Ontario

Establish the right team

Put in place a sustainable multidisciplinary team who can design, build and continuously improve the digital service or product led by a skilled product manager who is empowered to make decisions.

At a minimum:

- work collaboratively, and embed expertise from other business areas

- build a team with expertise in digital service delivery, technical, user experience and policy skills, identify gaps in the team and fill them, transfer knowledge and skills to others, and dedicate one user researcher to the service

- have a product manager with the ability to make day-to-day decisions, & make sure the team has senior sponsorship to support their decisions, goals and vision

- involve the maintenance team for the service or product in the early design phases, & continue to improve the service or product after it's gone live

Multi-Disciplinary Teams

- Build the right project team with the right players and contributors

- Digital work stresses criticality of multi-disciplinary teams

- Important to get other perspectives / input
  - Finance (e.g. fee calculation, payment handling, finance system integration)
  - HR (e.g. people, role impacts)
  - Customer Service (e.g. service focus, customer expectation management)
  - Communications (e.g. web copy, service promotion)
  - DEI (e.g. inclusion, accessibility)
  - IT (e.g. architecture, integration, data, security)
  - Other business units (e.g. process intersection, downstream impacts)

Roles on Successful Co-Design Teams

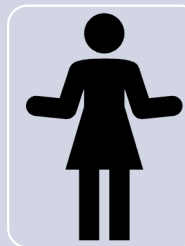| Business Service Lead | Product / Project Manager | Technology / Solution Lead | Analyst |

Core project team members may play multiple roles

Extended Team

These skills may be held by existing team members, vendors, or brought in at the task level from other parts of the organization or externally.

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Subject Matter Experts

Developer Resources

User Experience / Designer

Data Lead/ Analysts / User Researcher

Change & Training

Do you have the right skills?

- If not, where do you get them?

- Work with internal partners
- Contract in experienced project managers, systems experts
- Second existing staff to work on initiatives
- Look around the org – are there others with the experience / knowledge that you need?
- Is this a development opportunity for a staff member to step up – with some support (internal or external)

The Importance of Leadership

Defining the leadership role:

- Project Sponsor

- Service Owner

- Directly Responsible Individual

The Role of Leadership

- Team Support
  - Empower
  - Create a safe space
  - Coach
  - Protection
  - Negotiation
  - Strategic/tough decision making

Project Governance

- Establish a Project Steering Committee to support the core team

- Figure out who is affected
- Who controls resources that will be impacted by the initiative
- Who controls processes that will be impacted or that the initiative is dependent upon (e.g. payments, contracts, etc.)
- Who needs input into the project / oversight?
- Who has the authority to make decisions?
- Identify these people and involve them in the steering committee

Successful Project Governance

- Make meetings positive, constructive, additive – not destructive
- Check in on progress frequently with a light touch – encourage honesty
  - What challenges, barriers is the project team dealing with
- Don't second guess project team or remake decisions – trust delivery teams – empower them to make decisions
- Don't focus on minutia – focus on big picture
- Help teams reflect on their progress
- Support / stimulate discussion, insights and learning

1. Build a Coalition

- Establish a coalition of key players to help you formulate the approach, and to guide, coordinate, and communicate the vision.

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- Learn from others (municipalities)
- Understand the art of the possible – scan the marketplace
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- Protect the team
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- Articulate and reinforce new behaviors, making sure they continue until they become strong enough to replace old habits.
- Update Job Descriptions to reflect new mode of operating
- Iteratively improve the product / service

Empower the Team

- In setting up the team be clear about their role to:
  - Lead the change
  - Challenge the status quo
  - Be disruptors
  - Design a better way

- Communicate this to your coalition, steering committee, teams and stakeholders

- Push decisions making down and out where possible

- Setup an escalation protocol for bringing issues to the DRI to resolve issues/problems

- DRI – solve with the team, not for them – ask "what do you suggest?"

Protect the Team

- Create a positive working environment – people do their best work in these situations – and their worst under pressure, fearful, scared

- Protect
  - Their time
  - Their attention
  - Their focus
  - Their space to experiment, learn, explore
  - Them from unjustified criticism

Help Project Team Remove Barriers

- What sort of barriers do we expect to encounter
  - Staff and management change readiness/willingness/acceptance
  - Union concerns – role change, staff monitoring
  - Process barriers in other departments (e.g. payment handling)
  - User worries/concerns
  - Procurement
  - Corporate policy (signatures, approvals)
  - Resource availability – contention / availability to participate
  - Funding availability

- Tackle them head-on

- Avoid getting too locked in, be flexible, willing to adjust

Digital Service Standard #3:

Ontario

Be consistent

When the public interacts with the Ontario government, their experience should feel cohesive, positive and consistent.

At a minimum:

- put web content on Ontario.ca rather than create new websites or mobile applications

- use Ontario.ca as the front door for all applications on other platforms, and use an Ontario.ca/**keyword**, rather than register new public-facing domain names

- maintain the consistent tone, voice and style of government content that's easy to find, understand and use, use the Ontario Design System to develop your digital service or product

- demonstrate that the service or product is responsive and has the same content and functionality on all devices, including mobile phones

Also applies to **thunderbay.ca**

Digital Service Standard #4:

Design the service from start to finish

Understand what users are trying to do and design the simplest, fastest way for them to complete their task and achieve their goal. Where possible, each step of the journey should be completed online.

At a minimum:

- ensure prototypes incorporate the end-to-end user experience

- examine all channels to understand the steps users take to complete their goal and where your service fits into their journey, and show in a journey map

- review to reduce the number of steps a user must take before you begin prototyping, and have a plan for error recovery at each step

- do user research from the start with people who have accessibility needs, use the inclusive design cards, and test with users who need help to access digital tools

- use analytics data in user research and service improvements

How we do BPO

As-Is

- Identify the players, bring them together
- 'Map the process' (using post-its or online whiteboarding – Miro/Mural)
- Large scale brainstorm
- Identify key bottlenecks, opportunities to improve
- Employ the 5 Whys
- Identify ideas for improvements
- Write it up – a bit neater – don't worry about swim lanes or BPM notation/rules
- Circulate and make sure everyone validates the documentation – did we get it right

How we do BPO

To-Be

- Bring the key players back together
- 'Map the process' – to-be, the Netflix to your previous Blockbuster
- Large scale brainstorm
- Use post-its or Miro / Mural
- Employ the "why can't we", "what if …"
- Identify the key improvement ideas
- Write it up – a bit neater – don't worry about swim lanes or BPM notation/rules
- Circulate and make sure everyone validates the documentation – does this sound viable, what challenges do you see to getting there?

Digital Service Standard #5:

Ontario

Ensure users succeed the 1ˢᵗ time

Using a government service should be an intuitive and stress-free experience. Good service should be so simple that users can succeed on their very first attempt without the need for assistance.

At a minimum:

- explain the service or product and include who it is for, why it exists and how to use it, and include contact information so users can get help if they need it

- make sure people can find the service or product, including by testing its **name** to know if it makes sense to users

- use analytics and user research to reduce the number of people who didn't complete the task they set out to do online, and make design and content decisions based on research, testing, analytics and user needs

- demonstrate that the end-to-end user experience on all channels work and test each of them, including for people who need support accessing digital tools

Digital Service Standard #6:

Ontario

Test the end-to-end service

Continuously test the end-to-end service to make sure that it remains available to users and free of errors.

At a minimum:

- design and test the service in a testing environment and context of users experience (browsers, devices, assistive devices)

- provide developers with tools and supports to test the service during the build and after its launch, including load testing

- follow the recommended best practices for coding in your chosen technology and tools, and separate content, design and functionality so updates can be made independently

- document how the service was built and how it will be maintained, including how this documentation will be kept up-to-date

- have a process for: testing updates, monitoring the service, handling failures, and notifying users

Digital Service Standard #7:

Ontario

Make it accessible and inclusive

Accessible and inclusive digital design is good for everyone. Make sure the service or product is accessible to all users regardless of their abilities, device, environment or quality of access.

At a minimum:

- meet the WCAG 2.0 success criteria, and make the service accessible, including for users with lower levels of digital skills, limited internet access or connectivity

- make sure the service or product is usable by people with disabilities and different abilities by testing it with them, and with testing tools (including automated tools)

- make it easy for people to get alternate formats or to contact someone, and demonstrate how your team will be equipped with a knowledge of barriers to accessibility and be trained to assist users with disabilities in completing tasks and accessing information

- use plain language so services are easier for people to use

Digital Service Standard #8:

Be agile and user-centred

Design and build the service or product using an agile and user-centred approach. Agile is an approach to building services that breaks the work into smaller chunks known as iterations. Build and test one feature of the service or product at a time and work towards continuous improvement.

At a minimum:

- work in an agile way, using agile tools and techniques and continue to do so when the service or product is live

- explore design options for your prototype and explain why some are discarded, identify problems found in research, and make sure the team reviews and iterates on the way problems are fixed

- demonstrate that the service is agile, based on clear and measurable goals, and be able to give an example of how the team has responded to user research findings over time

- have a quality assurance testing and rollback plan that supports frequent iterations

- use a phased approach to test changes to parts of the service or product when feature-based changes are not feasible

Project Delivery Models: Waterfall

- Stage-based, single deployment
- Designed for large, complex software applications with fixed budgets
- Significant upfront planning
- Project success based on delivery within time, scope, budget
- Delivered *for* customers

Initiation

Planning

Execution

Control

Closure
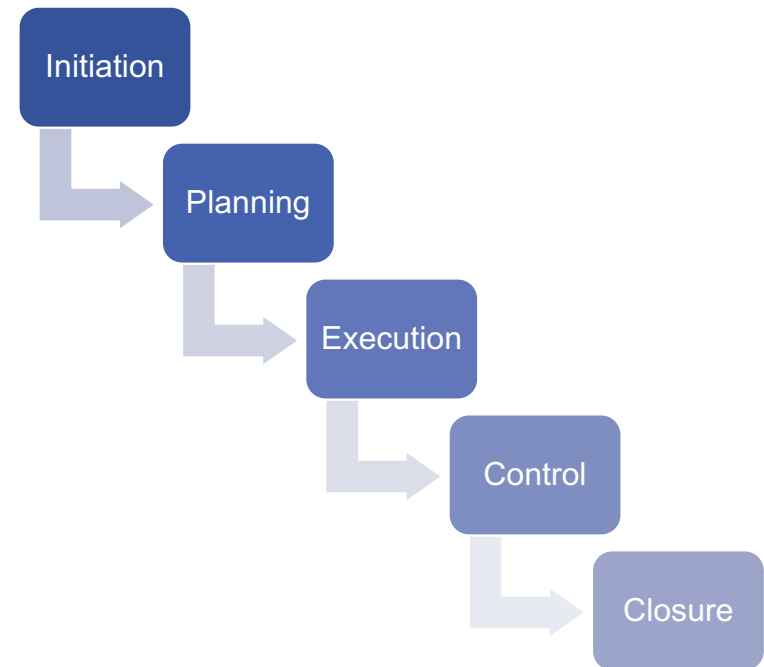
Project Delivery Models: Agile

- Incremental, iterative deployment
- Designed for outcome-based product or improvement program initiatives
- Project success based on customer satisfaction
- Delivered *with* customers

Requirements

Plan

Design

Develop

Release

Monitor
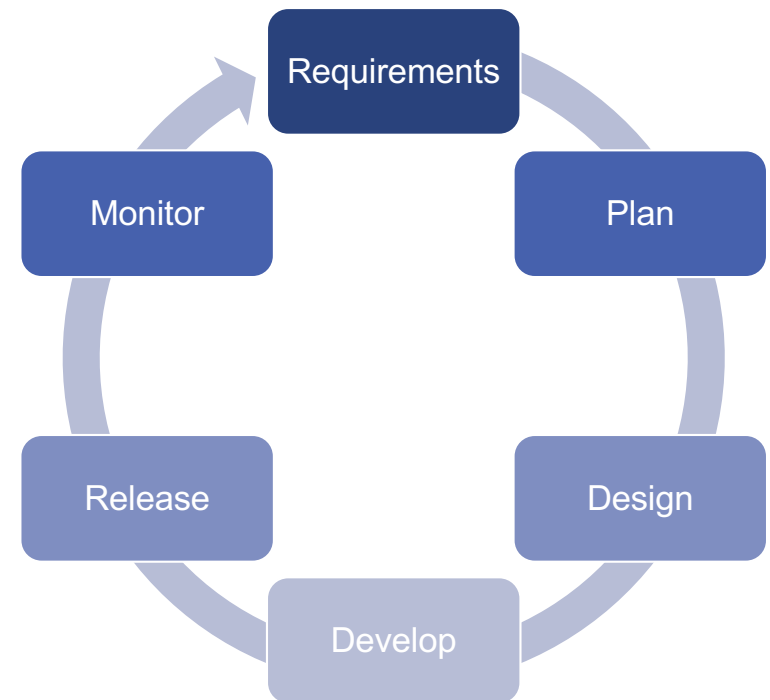
Agile Manifesto

We are uncovering better ways of developing
software by doing it and helping others do it.
Through this work we have come to value:

Individuals and interactions over processes and tools
Working software over comprehensive documentation
Customer collaboration over contract negotiation
Responding to change over following a plan

That is, while there is value in the items on
the right, we value the items on the left more.

Agile Roles
3 key roles

- **Product Owner** = Service Owner

- **Scrum Master** = Project Lead / Product Manager

- **Team Member** (multiple) = Analysts, SME's, Developer, etc.

Agile Methods

Scrum Methodology

- **Sprints** – short targeted efforts – often in 2-week blocks
- **Backlog** – identify work to be done (backlog), minimize work in progress, prioritize features/capabilities, actively manage backlog (to-do)
- **Daily standup** – 15-minute daily meeting core team, including DRI – each member of the team says briefly:
  - what they accomplished in the previous day
  - what they will focus on today
  - any barriers that are preventing them from accomplishing their tasks
- **Iterative solution development** – show and tell / testing at the end of every 2-week block
- **Retrospectives** - lessons learned

Agile Tools: Kanban
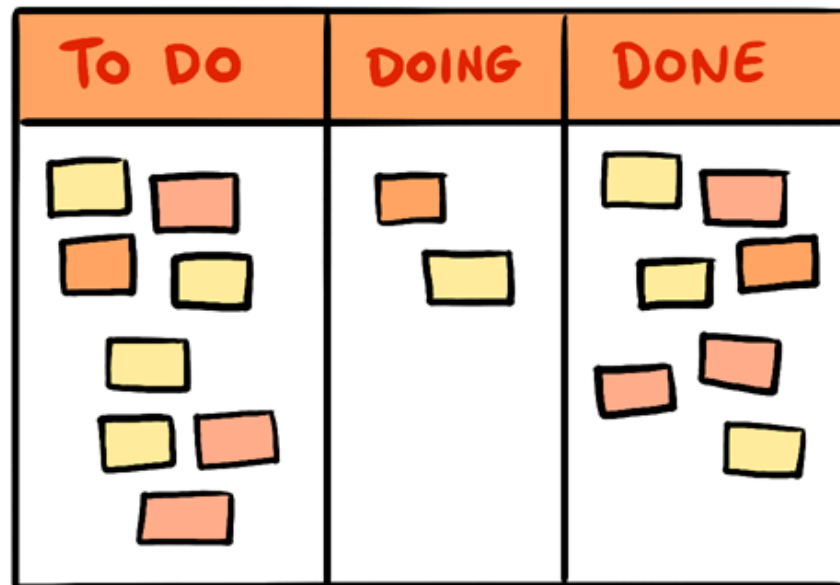
House Flipping with Agile

6-week house flip

- Tom + a team of subcontractors
- Conduct a walkthrough – build a backlog
- To do, Doing, Done
- 6 sprints – 1 week duration
  - 1 sprint – demolition
  - 2 sprints – electrical, plumbing, structural
  - 2 sprints – improvements
  - 1 sprint – final touches
- Team meets daily review backlog
- End of week – Tom leads the sprint review, home walkthrough and impacts on next weeks work
  - Identify improvements to the way the team is working / dependencies
- Tom pays contractors for increments of value (after each sprint review)
- Tom is the product owner – picks homes, the enhancements to do, moving items to done
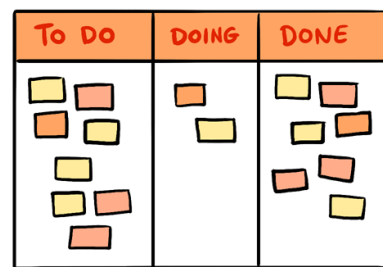
Agile Training

- We suggest you learn the basics of Scrum methodology
  - Used by Google, Facebook, Amazon, Apple

- Get a book, attend a course, watch some YouTube

- Apply the core ideas (without getting too swallowed up by the process)

- Agile coaching is available to assist project teams

Digital Service Standard #9:

Ontario ⬢

Use open standards and common platforms

Use open standards, open-source software and common government platforms where available. Open standards are created through collaboration and consensus by a community of experts. Free open-source software is developed and maintained using a collaborative approach between users, organizations and large companies.

At a minimum:

- identify and use open standards and ***common platforms***

- favour open tools that are accessible and have strong developer community support

- understand common user needs with other services and meet those needs consistently with the rest of government – ***reuse shared components where possible***

- demonstrate what the service or product provides to users and in what format or formats

- ***re-use*** common government platforms, for example Ontario.ca for web content

- use APIs and integrate them with any legacy systems where possible or necessary

Digital Service Standard #10:

Ontario

Embed privacy and security by design

Identify the data the service or product will use, store or create. Put appropriate legal, privacy and security measures in place so that users feel confident that their personal information will be kept secure and their privacy will be respected.

At a minimum:

- design for data privacy – document what is collected, stored, transmitted, and used (including why). Share data privacy controls and policies, including policy maintenance

- document security practices, including threat identification, monitoring management and reduction; fraud prevention; risk prevention; security updates; reviews (including frequency)

- describe your approach to privacy and security regulations

Digital Service Standard #11:

Support those who need it

Put tools in place across all channels to support people who cannot use digital services or products on their own.

Assisted digital support means providing support to those who can't use digital services or products on their own.

At a minimum:

- make it easy to get assistance either by phone or alternate technology

- make sure assisted digital support is sustainable, free to use, well understood and documented, supported by recruitment and research, designed for user needs/personas of those who need it

- conduct research and testing with users who already use or would use the service, and have the lowest level of digital skills, confidence and access, include those who currently seek assisted digital support from others

- respond to user research by continued testing and learning, improving assisted digital support, and committing to participate in ongoing user research to discover digital support needs

Digital Service Standard #12:

gray

Ontario

Measure performance

Understand the metrics you will need to capture. Monitor performance data continuously to inform ongoing service or product improvements.

At a minimum:

- Track channel performance in meeting different users' needs and cost per channel, i.e. use web analytics to capture info about user behaviour online, contact tracking for live channels, etc

- determine data needs, sources and collection, define performance metrics for the service or product early in the design process, benchmark across industry and similar government

- monitor and evaluate user feedback and complaints, including from other service touch-points such as in person or by phone, surveys or social media

- use qualitative and quantitative data, analyze performance and identify actionable data insights as early as possible

- share your review findings with leadership

Measuring Success

- What would be useful / important measures to track the performance of your new digital service?

Digital Service Standard #13:

Ontario

Be a good data steward

Follow the rules and best practices when you organize and manage data, including making data open by default. This is important because it allows data to be available to everyone equally, creating opportunities for the development of better government services, including across government.

At a minimum:

- collect data once and reuse it where possible, find ways to share data across government to reduce the burden for users

- make sure data is collected and used in ways that respect privacy, security and cultural awareness, and have a plan for data recovery in case of data loss

- use clear and plain language to tell users what data is being collected and used and let them know if or when it will be published

- engage users and make sure they understand how and why data is collected and shared

- strive to improve the quality of the data as a public asset in accordance with its value and user needs

Communicate Success

- Don't forget to celebrate and communicate successes, even the small ones.

- Recognizing good work is valuable for team morale and builds a sense of community across government.

- Newsletters, emails, blogs are a great way to share the positive work being done within the City and with the public at large.
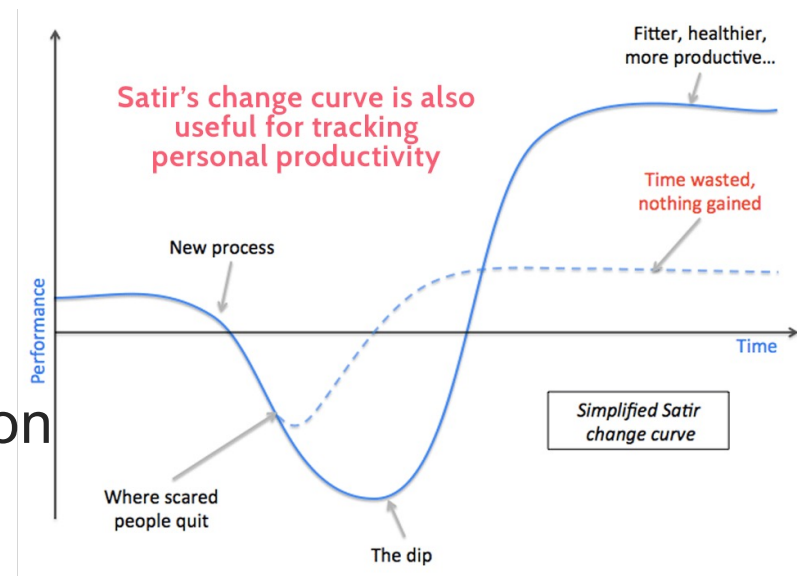
Perry Group Consulting Ltd.

Change Management

8-Step Digital Strategy Change Journey

8. Ownership
"We wouldn't do this any other way."

7. Adoption
"It went really well - we've got lots we can share about what we learned."

6. Participation
"I am working on a project to implement new digital ways of working."

5. Acceptance
"Let's get on with Digital, let's do it with new tools."

4. Personal Understanding
"I can see how digital could improve my services, and I am beginning to learn what it will take to be digital"

3. General Understanding
"I can see the value of digital, the drivers and benefits"

2. Awareness
"There is a digital strategy, it's been adopted by senior leadership & approved by Council"

1. Initiation
"We are developing a Digital Strategy"

Working collaboratively, developing roadmap, using BPO, learning how to work digitally, getting ready for projects

Implement the Strategy

Talked to other communities & vendors, learned about possibilities, bought into the potential opportunity.

Socialize the Strategy

Participated in development of the strategy – talked to internal and external users, learned of their expectations

Develop the Strategy

Digital Delivery: Change Management

Successful transformation or incremental change is *designed*

- Change perception matters
- Change support is important
- Sustaining change requires attention

Satir's change curve is also useful for tracking personal productivity

Fitter, healthier, more productive...

Time wasted, nothing gained

New process

Performance

Time

Simplified Satir change curve

Where scared people quit

The dip

Change is not a linear path – prepare for peaks & valleys

Components of Change
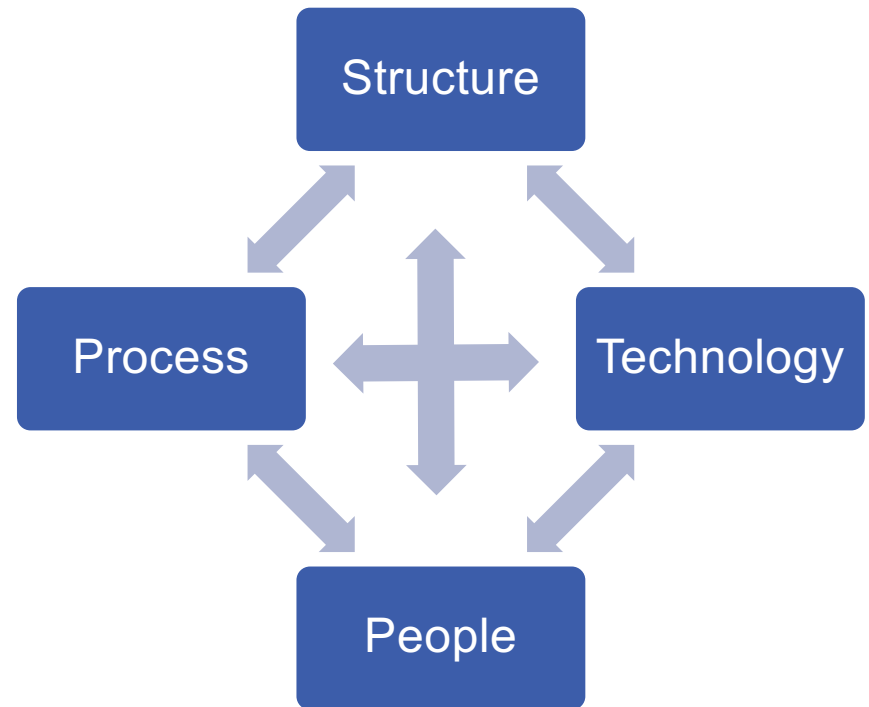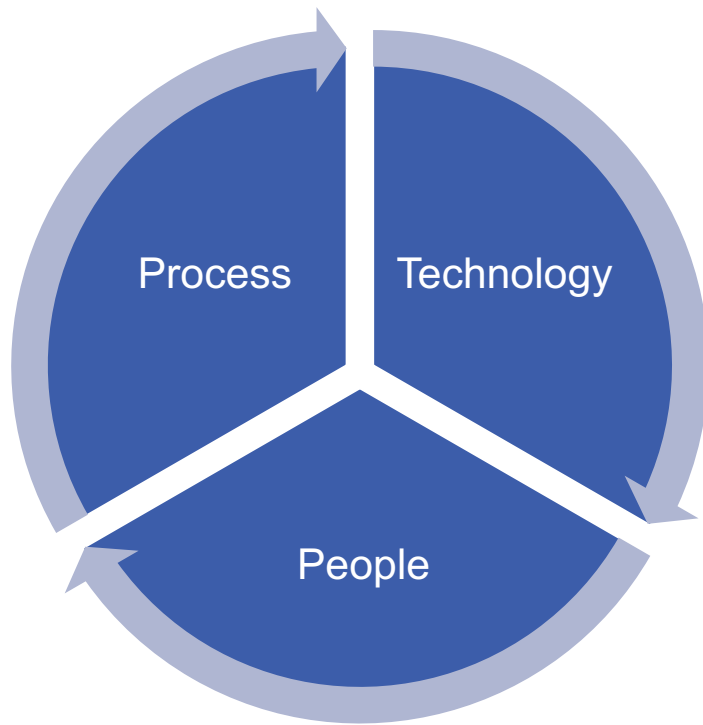
Kotter's 8 Steps for Leading Change
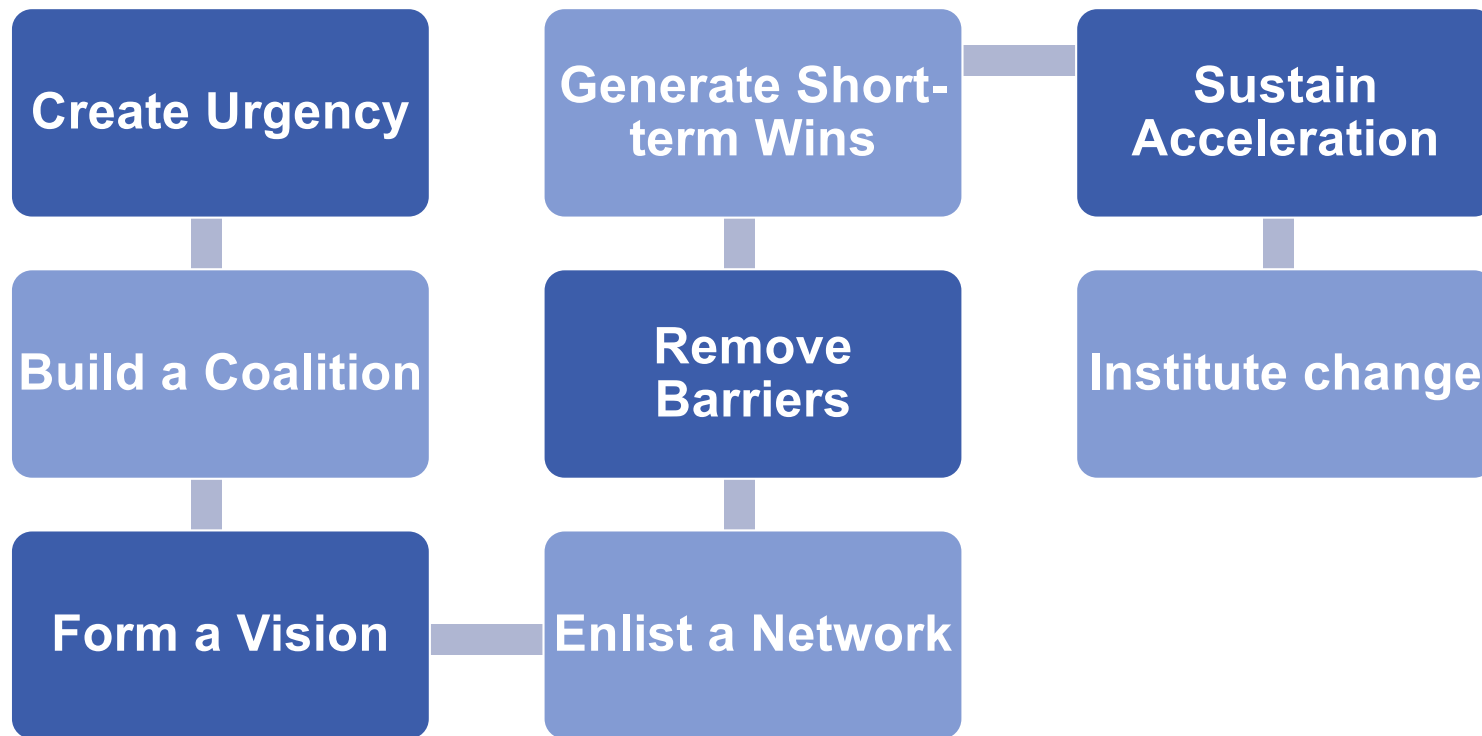
Prosci Change Management Model
ADKAR
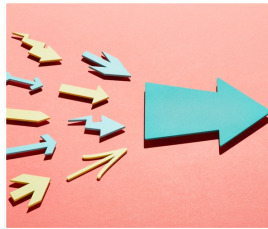
Understand Need	Participate & Support Change	How to change	Skills & Behaviours	Sustain the Change
AWARENESS	**DESIRE**	**KNOWLEDGE**	**ABILITY**	**REINFORCEMENT**
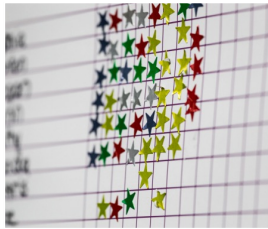
Principles of Change Management

Change impacts people

RECOGNIZE

Who and What

IDENTIFY

Collaborate on Why and How

ENGAGE

Support, Communicate & Train

PLAN

Track success

MEASURE

Meet the Resistance

- Be ready for resistance; many people don't like to change, period.

- They may be loud voices

- If they don't want to change – they are likely wrong

- Digital is the future – stick with your courage of convictions

- Help them change, people leadership and leading change/optimizing is your job

Counter the Resistance

- Anticipate and mitigate points of resistance

- Involve your team (and those impacted) in figuring out the future – better to have the naysayers inside the tent, not outside

- Have staff participate in as-is, to-be sessions, talk to other municipalities

- Involve union representation

- Work in the open – weekly email update, blog, week notes – no hidden agendas

- Hold regular open houses – updates, AMA

- Phase in change (agile, smaller bites helps with this)

- Dedicate attention / resources to building a change management plan

- Seek volunteers to be change champions

Change Agents / Champions

- Identify change agents / ambassadors (seek volunteers/applicants)
- People with passion and commitment to transform the business processes
- Promote the change and speak to its benefits
- Embed them in the process and articulate the value such that they become knowledgeable
- Use their feedback to manage change

Reinforce and Enforce

- Be firm and clear from the start – the new way is the only way

- Lead by example – "if it isn't in the system, it didn't happen" - don't allow your team other forms of reporting / updating

- Reinforce the use of the system at every opportunity
  - Daily, weekly check-ins and team reviews of data in systems
  - It may be awkward, but keep it going until becomes standard practice

- Use performance management – build into performance targets

- Use discipline process if necessary to proactively manage non-compliance

1. Build a Coalition

- Establish a coalition of key players to help you formulate the approach, and to guide, coordinate, and communicate the vision.

2. Identify the opportunities

- Learn from others (municipalities)
- Understand the art of the possible – scan the marketplace
- Identify services, define profile and current performance
- Talk to customers

3. Form a Vision, Identify Initiatives

- Collectively define and communicate how the future will be different from the past and how you will make that future a reality through initiatives linked directly to the vision.
- Identify key initiatives (backlog) + set out strategy

4. Build Buy In and Urgency

- Help others (in your team, across the organization) see the need for change
- Bring everyone up the mountain

5. Build the Team

- Dedicate the right resources
- Build a multi-disciplinary team – project lead, analyst, developer
- Co-locate if possible
- Identify key change agents that will help communicate/sell the change

6. Remove Barriers

- Protect the team
- Remove barriers, empower the team to work across silos, to challenge existing practices, and to generate real impact.
- Design the future

7. Short Term Wins

- Implement quick, initial wins that form part of the bigger story.
- Launch, learn and improve
- Recognize, communicate and celebrate successes early and often – to energize the team to persist.

8. Sustain Acceleration

- Build momentum
- Press harder after the first successes.
- Be relentless with initiating change after change until the vision is a reality.

9. Embed Change and Iterate

- Articulate and reinforce new behaviors, making sure they continue until they become strong enough to replace old habits.
- Update Job Descriptions to reflect new mode of operating
- Iteratively improve the product / service

Constant Cycle

- Continuous Improvement
- Digitization creates new opportunity

- Be curious, ask questions
  - What if … ?
  - How could we improve this?
  - How could we increase uptake?
  - How could we reduce the error rate?

What's Next? Module D Preview

- Ongoing Management – adopting a Product Mindset
- Continuous Improvement
- Measuring and tracking outcomes
- Promoting digital services uptake

- How this fits with Thunder Bay's governance model / process

- Your personal commitment

1 thing you learned

1 takeaway

1 thing you want to know / want to learn that we haven't talked about yet?

Final Takeaways

- Service Owner as product owner/leader
- Build the right multi-disciplinary team – don't skimp on resources
- Protect and empower the team
- Establish the right project governance
- Use a project methodology – Agile if possible
- Use the Digital Service Standard as a guideline
- Use Journey Mapping, BPO
- Have a plan to actively manage change