

Discovery research and design

G-Cloud 15

Contents

Discovery research and design	3
Case study	4
Service overview	5
Features and Benefits	5
Features	5
Benefits	5
Our Approach	6
Discovery research, insight and success strategy activities	6
Business continuity and disaster recovery plans	8
Onboarding and offboarding	8
Onboarding	8
Offboarding	8
Ways of working	9
Training	9
Service constraints	10
Ordering and invoicing	10
Pricing	10
Industry standards	10
Contact details	10

Discovery research and design

Our content and customer experience services reach from behavioural insight and inclusivity strategy, through human-centred service design, to digital experience platform strategy and out into digital, creative, content and UX design and delivery. CDS' comprehensive suite of customer experience services deliver compelling, intuitive and accessible user journeys, improving engagement and supporting the effortless delivery of digital services to our clients' customer bases.

CDS' multidisciplinary agile teams, user research specialists, design studio and accessibility teams provide digital experience platform strategy and implementation, behavioural insight, research and analysis, accessibility and inclusivity strategy definition and implementation, audience engagement/UX services, content strategy and content creation and communications planning and delivery.

We work with trusted open-source and low-code partners to define, architect and build engaging front ends with minimal cost and effortless maintenance, and our content strategists provide clear, concise copy with robust information architectures, keeping our customers' content fresh and accurate.

CDS' content and customer experience services include:

- Accessibility consultancy, training, workshops and support
- Accessibility training: creating PDFs and HTML from source files
- Accessibility training in PDF remediation using Adobe Acrobat
- Accessibility audit and accessibility testing
- Inclusivity consultancy, user testing and research services
- Content strategy, measurement and optimisation services
- Content strategy and design consultancy
- Content design, strategy and editorial services
- Content design for digital channels
- Content production cloud solutions
- Web editing and proofing and content services
- Discovery research and design
- Experience and service optimisation
- Service design and strategy
- User journey mapping and analysis
- Design system and DesignOps
- User experience design consultancy
- Digital experience platform (DXP) design and performance.

Our user-centred approach aligns with the GDS Standard and supports users with a range of digital literacy/skills and accessibility needs.

Case study

In response to Ofwat's AMP7 regulations, Yorkshire Water needed to rethink how it engaged with its 2.3m customers digitally to deliver more customer-focussed services and deliver its customer experience strategy.

Yorkshire Water's primary customer service channel was via telephone, which was inefficient and, despite the excellent work of its contact centre, did not always meet customer needs. The organisation needed a partner to improve the delivery of its online services and design a new customer-centric digital platform that would reduce the number of inbound calls and ensure customer communications were as inclusive and accessible as possible.

CDS' service design team delivered research and design thinking, aimed at understanding and developing the channel strategy. Our aim was to identify how customer engagement could change in a way that was preferable for customers and manageable for the business, to deliver a better experience for both.

We conducted research to understand where customers were engaging, where they wanted to engage and the challenges they experienced. We mapped user journeys and created 'as-is' maps showing how users interacted with the service, and the steps, actions and challenges they experienced. Using ideation sessions, we created 'to-be' service blueprints and tested them frequently with users, remaining focussed on customer needs and pain-points throughout the design process.

We also engaged with various teams within the business, and added the business perspective of people, processes and systems involved in those journeys.

We presented evidence-based recommendations around what digital channels needed to do to help customers engage with the business, and how channels could operate together to deliver a joined-up experience.

The research underpinned the content strategy and wireframes created by our user experience (UX) and user interface (UI) designers. We undertook a joint approach to development, testing, planning, and prioritising, which ensured the new website went live on time and with more functionality than originally planned.

Since its launch, the new platform has resulted in a 20% reduction in billing contacts, creating improved efficiency and customer experience and significant reduction in ongoing operational costs. The redesigned website won Gold 'Best Use of Digital from the Energy and Utilities Sector' at the Digital Impact Awards 2021.

Service overview

Our discovery research process is customised for the project type/complexity.

We understand that existing insight should not be duplicated. Our immersion process uses our own bespoke AI tool to get the team up to speed quickly and understand gaps in knowledge.

Audiences and services are increasingly complex. Our process synthesises insight from different disciplines (content audit, user research, business needs capture, service evaluation, and accessibility review) to prioritise requirements and support the next stages of design.

We support the build of digital touchpoints alongside service design requirements to deliver an experience which will support end users and internal stakeholders.

Features and Benefits

Features

- Immersion in existing insight to ensure no wasted/duplicated effort.
- Audience and journey mapping to ensure focus and direction.
- Stakeholder interviews to set business vision and objectives alignment.
- Journey mapping or service blueprinting to understand existing needs.
- Primary discovery research with appropriate methodology (in-person / remote).
- Technology agnostic approach at discovery - focus on needs.
- Inclusion of success strategy to support decision making.
- Synthesise and prioritisation of insight to gather/prioritise requirements.
- Experience design support (ideation or UX/UI/content design) – problem dependent.
- GDS assessment support and participation.

Benefits

- Understand user and business needs through evidence-based research.
- Ensure consideration and inclusion of different audiences' needs/goals.
- Research artefacts which can be re-used across service development.
- Demonstrate by default adherence to government service standards.
- Outputs from discovery drives activities within user-centred design process.
- Collaborative approach with blended teams and pods.
- Definition of KPIs and useful metrics.
- Progress confidently into next stages, with plan and roadmap.

Our Approach

Services are all around us, we interact with them every day. A well-designed service experience may not even be noticed by a customer or end user but will leave them with a great feeling meaning the experience has been usable, efficient and desirable. Service design is increasingly important as focus continues to move away from individual product-based models to the creation of services that surround and support a product.

CDS's approach to service design takes a wholistic view of the service experience rather than just the product interaction.

- Designing an experience from a service orientation, not from a commodity or goods and product perspective.
- Value exchange is the key differentiator, at CDS we design meaningful connections and interactions between all aspects of a service.

Omni-channel – taking a wider view

- Looking across digital, physical and social experiences
- Can also include real world environments
- Zooming out and taking a holistic view of the experience, stepping back from UX
- Zooming in to explore touchpoints which can include a digital product

Create alignment

- Build value for customers but also focus on the bottom line and objectives of the business.
- Reduce gaps between Customers, business stakeholders and service providers

Discovery research, insight and success strategy activities

Immersion

- Our immersion process uses our own bespoke AI tool to get the team up to speed quickly and understand gaps in knowledge.
- Familiarisation with existing insight and organisation / classification of documentation.
- Client involvement at this early stage adds context to the information.
- Tweak project activities based on findings.

Service scoping - audience and scenario mapping

- Scope the audience profiles to be included within the service, from a user and business perspective, to focus the project.
- We identify the attributes which drive various behaviours within the service, to ensure a range of needs and context is covered.
- Alongside identifying core audiences, we explore the scenarios and use cases to include.

Stakeholder interviews to understand business needs

- This early insight stage starts to understand pain points and opportunities and ensures the needs of the business is captured alongside user needs. We can validate any mapping conducted so far with these individuals, to define the audience groups and scenarios in scope.
- It can also inform any strategy work to create a proposition or vision for the service.

Service evaluation

- Evaluation of the service from the perspective of an industry expert, to evaluate touchpoints across channels.
- We assess, Effectiveness, efficiency and satisfaction plus consistency and coherence across the channels.
- We identify pain points and provide recommendations for improvements.

As-is user journey mapping or service blueprints

- Visualise the current journey. Gain a holistic view of the user journey from different perspectives and capture pain points and opportunities. Bring the team together to understand the problems to be solved in context and across channels.

Service strategy and business vision

- Create a place of reference and agreement regarding all the moving parts that it takes to deliver a service. A business model canvas states key partners, customer profiles, activities, resources alongside the core channels and relationships that will deliver the service.
- A value proposition canvas provides clarity regarding the pain points of the customer / end user and what we need to achieve from the service in relationship to the market.

KPIs and measurement

- Determine appropriate behaviours to measures; while challenging why you want to measure them. We clarify the business goals and achieve a balance regarding what data we need and the right number of KPIs.
- Data analysis explores how we will get the data (sources) and set up a measurement framework with appropriate metrics. We connect KPIs with available data and highlight any data requirements. This allows monitoring towards objectives by visualising and communicating metrics.
- We can then use data to understand behaviour and provide evidence to inform design improvements or new services.

Synthesise and prioritise insight

- Thematic analysis of existing insight to date defines the problem(s) to be solved clearly.

- We collate and consolidate insight and group / summarise similar findings as statements.
- Prioritisation and categorisation of these need statements together helps us more into design exploration and production.

Doing this activity as a team allows for alignment regarding the problems to be solved and a plan for the next design activities.

Business continuity and disaster recovery plans

CDS is committed to minimising and managing its exposure to disruption to the business and the services provided to our customers. This encompasses robust systems and processes necessary to maintain continuity of service and operations.

CDS maintains a comprehensive Business Continuity and Disaster Recovery (BCDR) plan, certified to **ISO 23001**, that defines clear roles, responsibilities, processes, and procedures for assessing and responding to disruptions to ensure continuity during disruptions. **Our plan is tested annually with lessons learned incorporated into plan improvements.**

Our Business Continuity Management System (BCMS) is underpinned by regular business impact assessments and threat and risk analyses, and annual tests to ensure all contingencies remain effective, current, and fit for purpose.

Onboarding and offboarding

Onboarding

CDS provides a tailored onboarding pathway, based on clients' individual requirements.

Onboarding is a collaborative process, through which we fully understand our clients' short-, medium- and long-term goals, and plan our service accordingly, to deliver best value and appropriate resourcing, governance, communication and planning.

Our multi-disciplinary agile teams will work with project stakeholders to understand the client and project needs and requirements.

We will define and capture ways of working, including definitions of 'ready' and 'done', and identify acceptance criteria for each sprint, underpinned by modern test practices and OKRs.

Offboarding

Upon starting the engagement, CDS will provide an exit plan for client approval. This will cover matters such as knowledge transfer and documentation, roll-off schedules, data and asset transfer, intellectual property and removal of access / permissions and return of devices / equipment.

Ownership of data contained in any solution belongs to and rests with the client; as the service is decommissioned, raw data will be transferred to the client. CDS is certified to ISO 27001 for data security and will always adhere to these standards – including data removal and destruction.

Ways of working

At CDS we apply agile principles across our projects, primarily using the SCRUM Agile methodology. We operate multi-disciplinary squads that combine domain expertise with technical excellence, delivering value early and iteratively through two-week sprints. Our approach is underpinned by the following core practices:

- **Daily standups:** A team call for 15 minutes each morning to track progress, surface blockers and ensure sprint goals are achieved.
- **Sprint planning:** Held at the start of each sprint to prioritise the work, align on objectives and ensure the team is fully prepared.
- **Sprint review:** At the end of the sprint, the team demonstrate to all stakeholders the deliverables achieved and present the sprint goal for the next sprint.
- **Sprint retrospective:** For each sprint the team will review what went well, identify areas of improvement and embed lessons learned to drive continuous improvement.

Additionally, we have an Agile mindset and culture at CDS, in which we apply:

- **User-centred design and customer-focus:** Through collaboration and partnership working we deliver outcomes that meet user needs.
- **Adaptability and flexibility:** Short feedback loops enable us to respond quickly to change, with teams empowered to pivot as required.
- **Continuous learning:** Retrospectives encourage open, honest feedback to continually improve ways of working and delivery effectiveness.
- **Partnership and teamwork:** We create a one-team culture with our clients and their supplier partners, working collectively towards shared project goals.

Training

As well as continual 'on the job' knowledge transfer to upskill client teams, CDS can provide formal, comprehensive training for administrators and users prior to handover and go live designed to support successful change management, ensure smooth implementation and embed solutions that are integral to business operations. Our training also builds internal technical capability, empowering teams to become self-sufficient and reduce the long-term cost of change.

In most cases, we adopt a 'train-the-trainer' model, delivered through a blend of on-site and remote sessions. This is supported by comprehensive training materials and easy-to-follow digital end-user guides, written for non-technical audiences and compliant with WCAG 2.2 accessibility guidelines.

Service constraints

Attainable service levels will be dependent upon the service performance of cloud suppliers within the service chain. Maintenance windows may apply, and clients should refer to the SLA for the specific service in use.

Ordering and invoicing

We recommend contacting CDS before placing an order via G Cloud 15, to confirm and agree scope, scale, SLAs, KPIs, outcomes, etc. We will be pleased to support clients to define statements of work that reflect their requirements.

Invoices are issued monthly in arrears, with payment terms of 30 days.

Pricing

Timescales and costs vary, depending on several factors; we recommend a preliminary review to provide a firm cost.

Please refer to our pricing document and rate card.

Industry standards

CDS delivers all its services to internationally recognised standards. CDS is accredited to the following standards:

- ISO 9001 Quality Management System.
- ISO 27001 Information Security Management.
- ISO 20000 IT Service Management and IASME certified.
- ISO 14001 Environmental Management.
- BSI 1008 Electronic Information.
- ISO 22301 Security and Resilience (Business Continuity).
- ISO 45001 Health and Safety Management.
- ISO 10008 Evidential Weight and Legal Admissibility of Electronic Information.
- ISO 50001 Energy Management Standard.
- Cyber Essentials Plus.
- IASME certified.
- ITIL compliant service desk.
- PlanetMark Sustainability.

We comply with the Data Protection Act 2018 and UK GDPR regulations.

Contact details

Matt Johnson,
Head of Public Sector
CDS, Yorkshire House, Greek Street, Leeds, LS1 5SH
Email: bidteam@cds.co.uk
Telephone: 07939 866831
Website: www.cds.co.uk
