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The emergent roles of a designer in the development of an e-learning service

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Summary

This paper presents reflections from a service design case study and uses it to investigate the emerging roles of a designer. Skills, methodologies and values are drawn through the case study and used to communicate how this contributes to the continuing expansion of the profession today. Seven roles are discussed in this paper: designer as a facilitator, communicator, capability builder, strategist, researcher, entrepreneur and co-creator. The analysis of the activities of the designer in this particular case study has indicated a presence of all of these roles in various degrees. This brings up three key questions for discussion:

1. How can the design profession communicate the value of this role shift to external audiences?
2. How will design education address the requirements of these emerging roles?
and more relevant to this workshop,
3. How will businesses utilise these additional skills of a designer?

The changing role of the designer: recent literature, research and initiatives

There has been surprisingly little by way of literature solely dedicated to the changing role of the designer. Anna Valtonen (2005) is one of the few authors who recounts a concise history of the changing role of the industrial designer from a Finnish point of view. Valtonen maps the role of the industrial designer from the 1950's- moving from being the sole creator of mostly products, to working within multi-disciplinary teams to tackle technological complexities, to becoming end-user experts, to roles in design management, to creating experiences and brands, and finally to that of "pushing innovation" in a national context

(Valtonen, 2005). Certainly in Britain, designers have encountered all of Valtonen's roles, but more recently this has been aligning with that of "pushing innovation" (Valtonen, 2005). In 2005, the Cox Review sought to embed design in national policy, outlining that design and creativity should play a bigger role in developing UK national competitiveness through connecting design to business (Cox, 2005). This was closely followed by the establishment of the Design Council's Dott 07 (Designs of the Time) programme in 2006, which looked at how designers could drive innovation in the public sector (Design Council, 2006). In 2007, the InterSections 07 Conference debated design know-how for a new era. It highlighted the widening repertoire of design practice today. Conference Chair Jeremy Myerson identified four new roles of design practice in the UK, that being the designer as strategist, co-creator, storyteller and rationalist (Myerson, 2007). Since then, other initiatives, such as Victoria & Albert Museum's think tank, The Future Designer, have also debated the role of the designer as celebrity, collaborator, accelerator and synthesizer (V&A, 2008). In 2009, a consolidation of interdisciplinary design projects for the Designing for the 21st Century Research Initiative identified more roles of designers, extracting these as major themes across all the initiative's projects. These roles were that of the designer as negotiator, facilitator, visualiser, navigator, mediator and coordinator (Inns, 2009: 24-6).

As seen, the role of the designer has been explored, but with the tendency to do so on a very broad scale. On more focused perspectives, especially that in service design where designing is less about artifacts of design and more about designers linking social, technological and cultural dimensions (Manzini, 1993), different roles of designers have not previously been looked at with a dedicated focus. Such perspectives provide a deeper understanding of the kind of skills, methodologies and values designers working in such a context contribute to business and society. Many of these roles in service design practice overlap with the roles previously identified in literature, research and initiatives, and many of them implicit in design activity since the earliest days where people began designing, "to shape and make our environment in ways without precedent in nature, to serve our needs and give meaning to our lives." (Heksett, 2002: 5). More recently, service design researcher, Lauren Tan's PhD work (to be completed in 2010) is based on understanding the emerging roles of designers in Dott 07¹ public design commission projects. Her preliminary finding strengthens the notion that new emerging roles are required in the development of a systemic solution. Seven roles have emerged from her analysis on the service design projects which indicate that designers act as: facilitator, researcher, co-creator, communicator, strategist, capability builder and entrepreneur.

Many roles of the designer in service design have yet to be formalised and recognized, and it is our intent to investigate design through such a lens to not just draw out existing and new kinds of skills, methodologies and values, but also communicate how this contributes to the continuing expansion of the profession today.

¹ Design of the Times 2007 (DOTT07) was a programme of public design commissions situated in the North-East of England, co-sponsored by UK's Design Council and the regional development agency OneNorth East. Its aims were to demonstrate how design and designers could tackle social issues in five broad areas of: health, education, transport, energy and food.

A knowledge transfer case study

This case study is derived from a Knowledge Transfer Programme (KTP) project, a UK funded scheme that involves the forming of a strategic partnership between an academic institution and a local company, through the appointment of a recent graduate (the 'associate'). This project involves collaboration between Northumbria University and a training company who specialises in delivering a wide range of performance enhancing services for individuals and organisations. The company recognised an opportunity to use networked technologies to create integrated learning services which will not only bring distinctiveness and added-value to its service offering but cost savings to the business as well. The associate (Phillip Meredith) is jointly supervised and supported by a team comprising of academic and company supervisors.

Generally, a KTP project has two distinctive aims: operational and strategic. In this particular project, the operational goal is the development of an e-business model through the creation of an e-learning platform. This e-learning platform will form the focus of the service delivery for the company in terms of helping them manage and deliver resources to their learners. In comparison, the strategic aim of this project is the embedding of design processes and methods as a means of service innovation within the company. This cultural change should include the creation of a design function within the company that will extend beyond the associate. The operational aim (in this case the e-learning platform) is the vehicle to achieving the strategic changes.

The nature of a KTP project offers the designer a different design project environment compared with the consultancy-based models, and presents a unique opportunity for him to drive transformation within it. It changes the relationship between the designer and the client, as the designer is an employee and not an external contractor. The political aspects of this relationship provide an added challenge to a designer operating in this environment. The length of the project is also rare, giving the designer 24 months to devote to a single project. At the time of writing, the project has been running for 13 months and is due to end in May 2010.

Although there have been other types of design-related KTP projects in the past, this is understood to be the first KTP that uses a service design approach due to its focus on enhancing the company's e-learning service delivery. Service design is distinct from graphic or product design because it links the social, technological and cultural dimensions rather than relying on a technological understanding of industrial artefact (Manzini, 1993). This shift we believe, has led to a change of roles for designers. We will present our reflections on roles that have emerged during the project and offer evidence towards the recognition of these roles.

The emerging roles in a service design project

Seven roles of a service designer

This paper uses Tan's seven roles (Tan, 2009) as a starting point to frame the range of activities that have emerged in the project and highlight instances when a particular role was adopted and the challenges associated with it. Table 1 presents a summary of these seven roles and their associated characteristics derived from Tan's analysis of the Dott 07 service design projects and supported by references from various literature.

Table 1: Seven roles of a service designer

Roles	Characteristics	Examples of activities
Designer as Facilitator	<ul style="list-style-type: none"> » Joining up different thinking, philosophy and approach from different parts of the stakeholder groups. » Enabling better collaboration, synergy and participation of people. » Mobilising and energising thinking of others (Inns, 2007: 25) 	<ul style="list-style-type: none"> » Facilitating reflective practice among the stakeholders through formal (for example in workshops) and informal means (for example in conversations). » Translating conversations into visuals (for example graphic facilitation).
Designer as Communicator	<ul style="list-style-type: none"> » Using visuals to initiate conversations around issues, gain feedback for iterations and ideas. » Using communication devices to bring together disparate stakeholder groups. » Closely linked to the facilitation role. 	<ul style="list-style-type: none"> » Examples of tools used include storytelling, diagrams and prototypes. » Illustrating relationships, emotions, networks, abstract, systems, prototypes and strategy through visual means.
Designer as Capability builder	<ul style="list-style-type: none"> » Transferring design processes and methods to businesses to enhance their own processes. » Acting as a 'conduit' in the knowledge transfer process. 	<ul style="list-style-type: none"> » An adoption of design processes and methods into business processes.
Designer as Strategist	<ul style="list-style-type: none"> » Involved in designing and planning action and policy to achieve a major or overall aim. 	<ul style="list-style-type: none"> » Acting as the project champion and lobbying support for the project. » Helping create and visualise strategy.
Designer as Researcher	<ul style="list-style-type: none"> » Doing research with stakeholders and potential stakeholders of the product or service. » Project outcome are usually recommendations, 	<ul style="list-style-type: none"> » Using a range of methods such as questionnaires, surveys, vox pops, observations, interviews, personas, context mapping, journey mapping, cultural

	<p>improvements, ideas and opportunities translated from design-led research, rather than a design artefacts.</p> <p>» Drawing research methods from architecture, development studies, anthropology, social sciences, marketing, business etc.</p>	<p>probes, stakeholder mapping and workshops.</p>
<p>Designer as and Entrepreneur</p>	<p>» Designer involved in end-to-end process of developing and rolling out an idea that can function profitably or sustainably.</p>	<p>» Looking toward commercialising the idea.</p> <p>» Looking for ways to develop ideas into a sustainable enterprise model.</p>
<p>Designer as Co-creator</p>	<p>» Relationship with users is to both ‘design with’ and ‘design for.’</p> <p>» Co-design’s approach is about:</p> <ul style="list-style-type: none"> ○ The participation of people; ○ A development process; ○ The creation of ownership; and ○ Being outcomes-based (Bradwell and Marr, 2008). 	<p>» Involving user groups throughout the project to co-create solutions.</p> <p>» Using a range of participatory tools such as cultural probes.</p>

Designer as Facilitator

A designer acting as a facilitator attempts to join up various thinking, philosophy and approach from different stakeholder groups. The purpose is to enable better collaboration, synergy and participation of people in the group. It was essential for Phil (the associate) to gather disparate views from a number of different teams, as the system that he was building will have an impact on a majority of the departments. Phil recognised that the success of the e-learning service platform was not only dependent on building a technically sound product but also ensuring ‘buy-in’ from all the stakeholders. It is crucial to engage the stakeholders at key stages of the process to ensure that their requirements are set out and different agendas understood.

During the project, Phil and the technology team trialed and tested various methods of systems and techniques designed to enable and encourage communication, and contribution within the team more efficiently. An internal blog and later, a feedback wall were created for these purposes. A feedback wall was set up within a social environment enabling the team to communicate ideas and progress to the rest of the company and to facilitate a sharing of ideas, news and views from other staff. At the same time they also launched a company wide blog system so that the same information could be relayed to the members of the team who were not based at head office. Additionally, Phil and his team used it to keep a more structured audit trail of conversations and feedback.

The blog was a huge success, with around 230 posts over the past year, contributions of posts from 22 authors and over 118 comments made on the posts. The blog was used mainly for internal communication and sharing of information. However, the feedback wall was less

successful and did not generate the intended interactions. The success of the blog over the feedback wall could be due to the accessible nature of the blog for non-office based staff, making it easier to access offsite and encourage participation in the company culture. We speculated that while the wall was useful for information dissemination, staff might have felt uncomfortable 'interacting' with the wall within the company's social space.

Designer as Communicator

Bridging the gap between different members of the team is a key role of a KTP associate, requiring the individual to be able to communicate on all levels, with people from very different backgrounds. Being able to communicate design and system information effectively while not losing crucial details in the translation was an important part of the role. The initial problem that Phil encountered at the start of the project was the unanticipated growth of the company, resulting in new team members joining the company on a daily basis. He recounts his initial surprise at the differences:

'One of the biggest culture shocks was my expectations surrounding communication. When working in a smaller team, communication was not an issue, as meetings and workshops were very easy to coordinate. However, working in a team of 160+ was entirely different. Very strategic decisions have to be made early on, to ensure that the right people are involved in the decision making.'

Being the only designer in an organization presented some additional communication challenges for Phil. Stages of the creative process such as workshops and idea presentation had to be planned in much more detail. When working with people of a similar skill set, a designer can overlook finer details of the design or reasoning behind the decisions of more trivial details. However – in Phil's case, decisions had to be justified more thoroughly and he felt that he had to manage expectations efficiently. One of the main challenges of the role is to balance design factors such as usability and aesthetics, over cost and value.

Designer as Capability Builder

One of the strategic aims of the project was to embed design processes and methods into the company's existing processes. This aim aligns strongly with the role of the designer as a capability builder, acting in the role of a 'conduit' of knowledge transfer between the university and the company.

'I realised quite early in the project that it would be important not only to make sure people considered new aspects when making decisions such as design and usability, but also more importantly to embed this type of thinking within the team. This is important because in future projects, they would have the knowledge and skills to ensure that the final service offering is consistent with other services.'

Even though the project has only just past its halfway point when this paper was written, we observed an increase awareness of design issues amongst the technology team members. The increase usage of design vocabulary and evaluation of services based on design issues such as usability and service experience seem to indicate that the project has had some success on the awareness level. Phil is also aware that part of his role as a capability builder is not only to transfer new methods of working to the company staff, but also to ensure that they take ownership of the processes.

Designer as Strategist

The nature of the KTP project requires that the project have a strategic aim rather than a purely operational one. This requires Phil to be involved in the designing and planning of action and policy in order to achieve a sustainable and profitable e-learning service delivery platform. The implementation of this strategy will enable learners to be flexible in their learning strategy and approach, increase learner numbers through the streamlining of business process within the company and reduces the cost of service delivery. Phil has found this shift from a designer to a strategist challenging yet exciting.

'In my previous job as a designer within a creative firm, I was often delegated work after key decisions had been made resulting in less opportunity to be involved in discussions surrounding strategic decisions. Where as in my current role, although I am the sole designer here, I am the main person driving the project forward and am very involved with all the strategic decisions.'

Part of the role of a strategist is to 'sell' the strategy to key members of the company in order to achieve buy-in. However, Phil was surprised that he had to put in a lot of effort to convince key stakeholders to agree to changes that was proposed.

'As the KTP project had the support of the company's directors, I felt that whatever proposals I put forward, will be accepted by the staff as long it was supported by appropriate research. I did not consider the possibility that I would have to sell changes as heavily as I did. Towards the mid point of the project I had to champion a new system that I felt was the most appropriate for the project by running workshops with staff, clients and company directors to get important buy-in early on and also to help transfer ownership to the teams that would be using the system.'

Designer as Researcher

Due to the technical requirements and financial investment required in the development of an e-learning portal, a large part of the project activity was research-related in order to gain a better understanding of these issues. The research centred around two main issues: understanding users (internal and external) and understanding existing e-learning systems. Both presented complex sets of issues. There are many different groups of users; internally there are trainers, evaluators, administrators, sales assistants and finance officers while external users can range from school leavers to mature students with little or no experience in using the Internet. Matching the range of training and assessments required with a suitable E-learning system was also difficult due to the range of courses being offered, the varied types of users and the different functionalities of existing E-learning systems. This meant that research became a key tool for Phil to develop an informed and objective approach in the evaluation of these systems. Selection of the appropriate system for the delivery of the learning was the crux of the project, and the consequences of selecting a wrong system could be catastrophic. For the purpose of the research, Phil used a range of design research methods, which included observation, work shadowing, persona creations, user journeys, interviews and questionnaires.

Designer as Entrepreneur

If we were to look at the characteristic of an Entrepreneur (defined in Table 1), Phil has been involved in the end-to-end process of developing and implementation of an idea. However, he has been less focus on the commercialisation aspect of the idea. He has had to

understand the business and financial implication of the E-learning system in order to be able to evaluate the sustainability of the project beyond its two-year span.

Designer as Co-Creator

The whole ethos of the project was to ensure that the system that was eventually developed will not only help streamline the current learning delivery system resulting in cost savings, but also to ensure the improvement of a learner's learning experience. This meant that developing a system that was usable, functional and experience enhancing required Phil to understand the users implicitly. To achieve this, he has had to work closely with users to ensure that he understands their needs and the barriers that they faced in the adoption of a new system. Part of the legacy of the project is the creation of project ownership, which is considered to be a key characteristic of co-creation. It's probably too early to evaluate the success of this factor, but early signs seem to be encouraging. Three workshops held with training advisors who will be the main internal users of the system have been positive.

Discussions

There is 11 months remaining in the project. So far, the challenges for Phil has been to understand the requirements of the business in terms of the company directors' vision of the E-learning service offering and the requirements of the various groups of users. From here onwards, Phil will be focusing on the implementation of the system, creation of learning resources and trialling the system. Our discussions surrounding the range of activities undertaken by Phil has highlighted the number of roles he has had to take on for this project. While this type of project is generally not the norm for a traditional design project, many parallels can be drawn with the roles derived from other service design projects such as the Dott 07 examples. Although a few case studies might not provide strong enough evidence to validate the existence of these roles, it does provide further support to the view that designers are acting beyond the accepted 'role' of a designer. This should be recognised formally not only by the design profession and but also by educators. Understanding the skills required to fulfil these roles and how to equip students with them should be a key educational agenda. In addition, what role would business play in the recognition of these roles? How would businesses make the most of a designer's non-traditional skill?

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