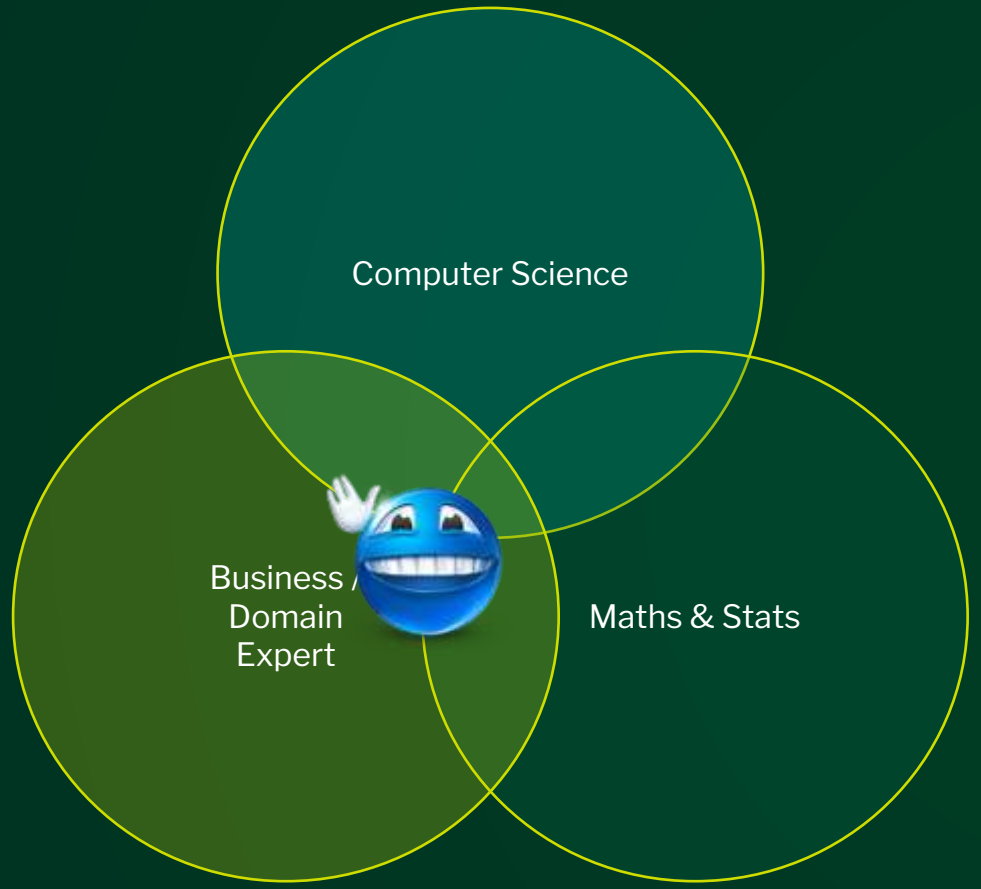
the secrets behind successful self-service

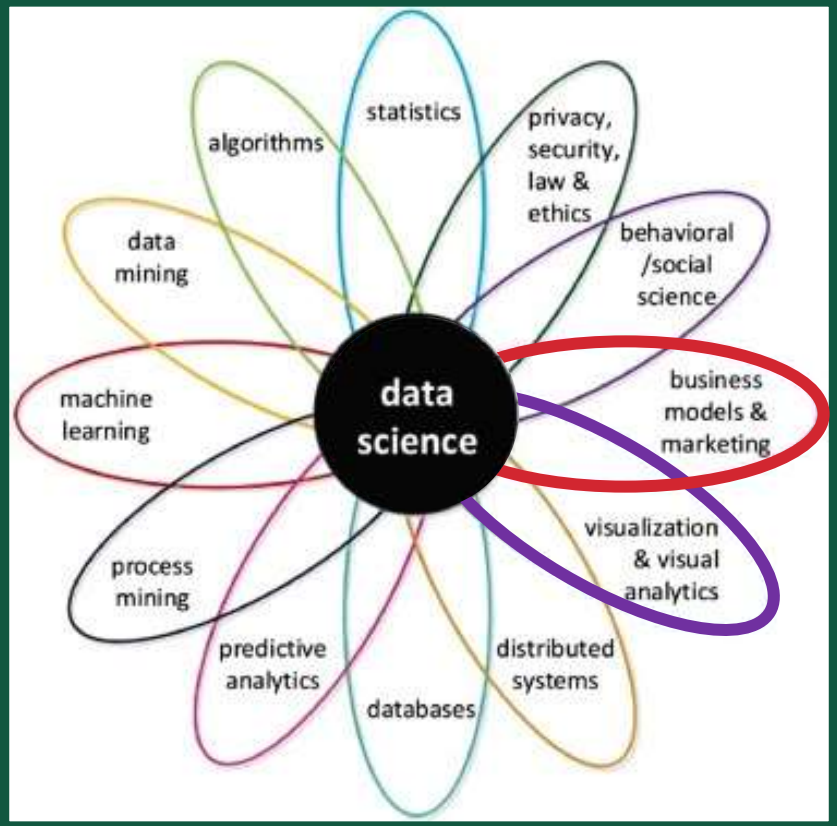
Nedbank
Head: Consumer Innovations

about me

The original venn diagram



a more accurate one?

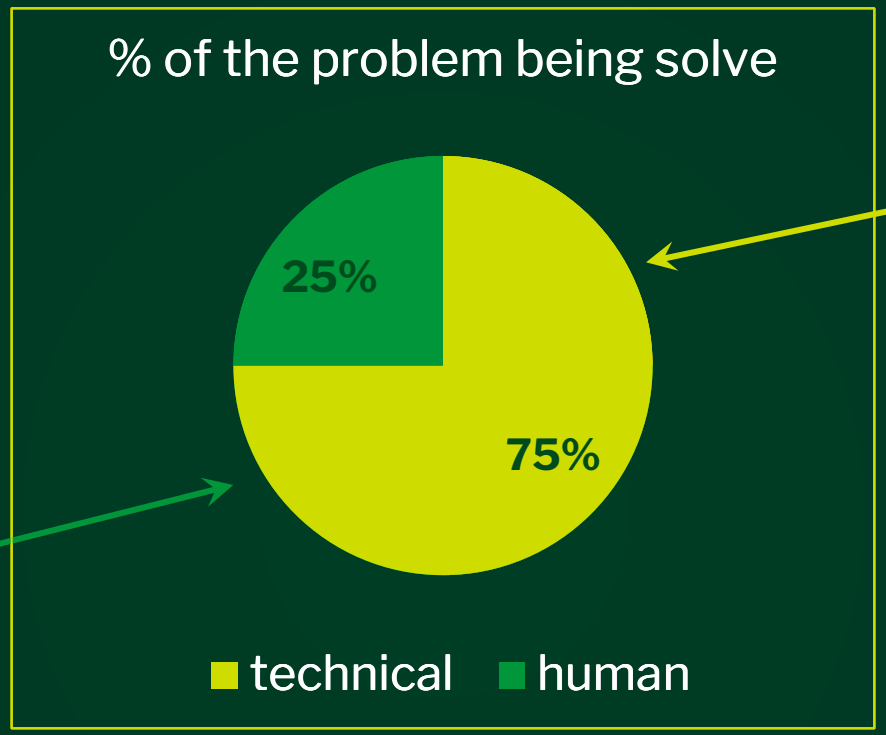


(Hassani et al., 2021)

Hassani, H., Beneki, C., Silva, E. S., Vandeput, N., & Madsen, D. Ø. (2021). The science of statistics versus data science: What is the future? In Technological Forecasting and Social Change (Vol. 173). Elsevier Inc. https://doi.org/10.1016/j.techfore.2021.121111

what is self service

definition of self-service from the Cambridge Business English Dictionary © Cambridge University Press



a **complicated** problem

a **complex** problem

a system in which customers are not served by an employee, but collect goods or food themselves

but extract data themselves

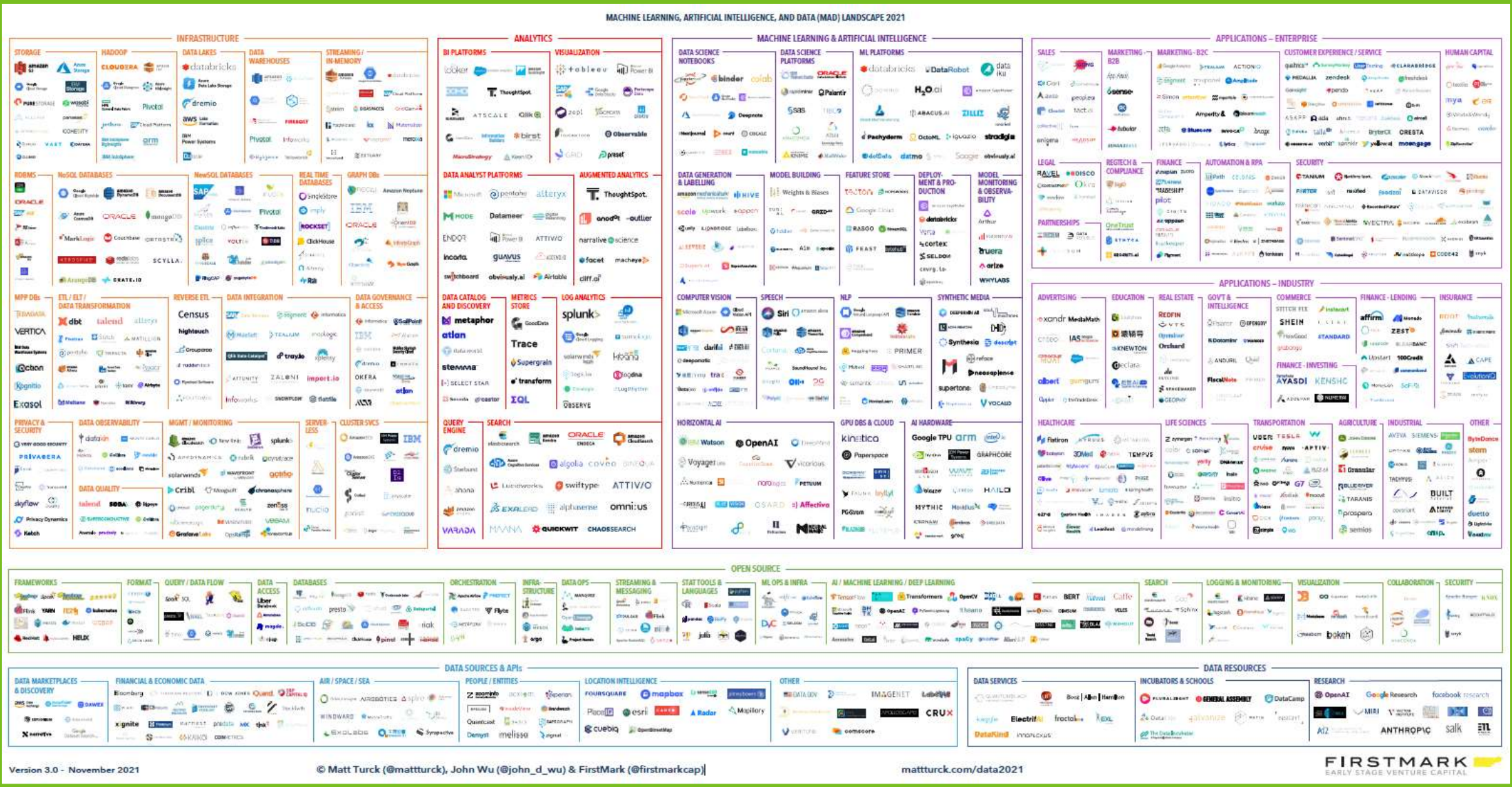
but derive insights themselves

but build models themselves

but do predictions themselves

Very important – this stays:
customer
it does not become ***employee*** because it is internal

why this is **not a** technical presentation



mattturck.com/data2021 Matt Turck (@mattturck), John Wu (@john_d_wu) & FirstMark (@firstmarkcap)

what drives self service?

$$f(\text{human}) < \left(\text{perceived value} \right)$$

my case study

Quants / Analytics Team

Support

MI / BI team

Support

Operational Team

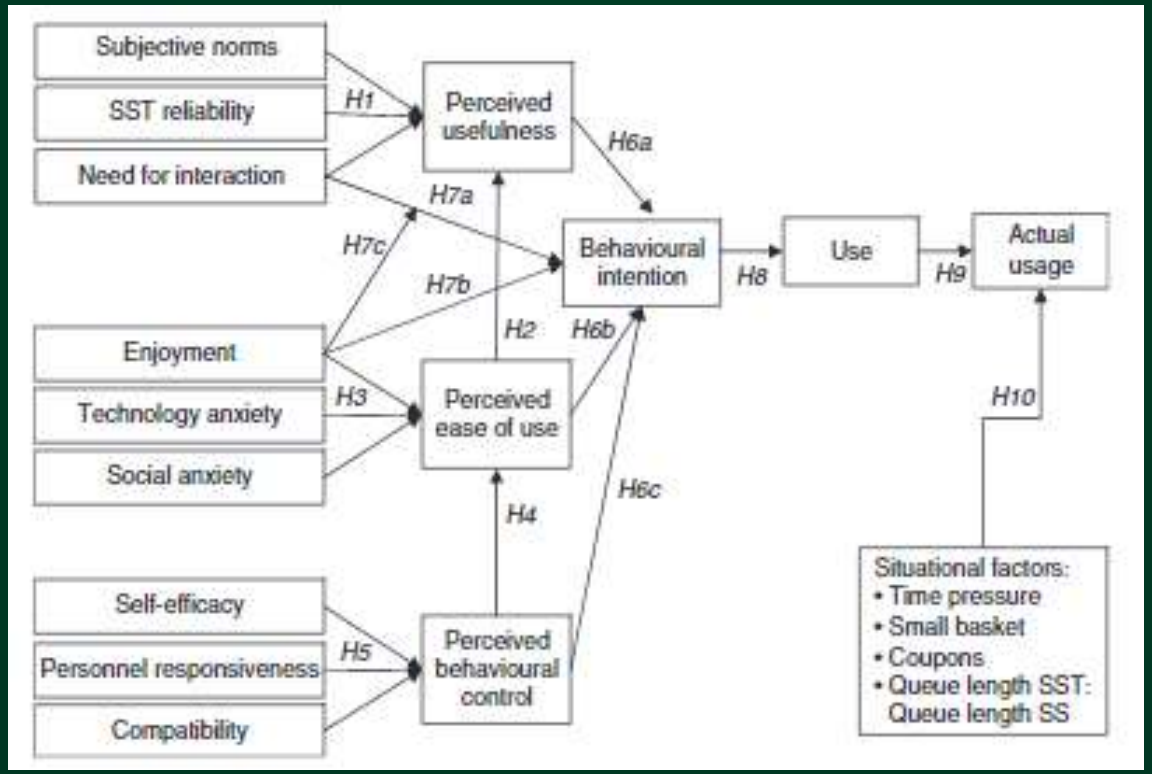
Collections, Recoveries and Client Management

what is this f(human) and (perceived value)?

Demoulin, N. T. M., & Djelassi, S. (2016).

An integrated model of self-service technology (SST) usage in a retail context. International Journal of Retail and Distribution Management, 44(5), 540–559. https://doi.org/10.1108/IJRDM-08-2015-0122

conducted a survey at the exit of one of the major retail chain stores in France conducted among 143 users and 150 non-users of SSTs at the exit of a grocery store



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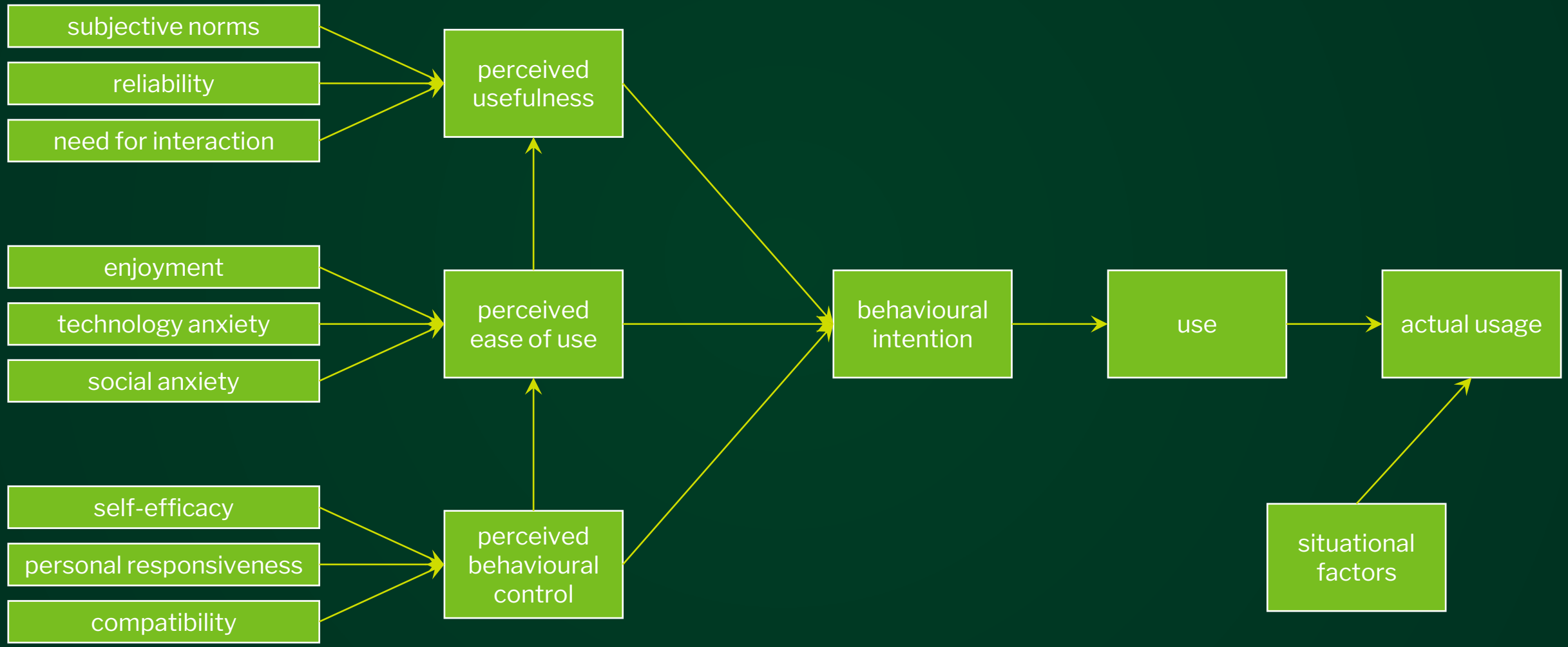

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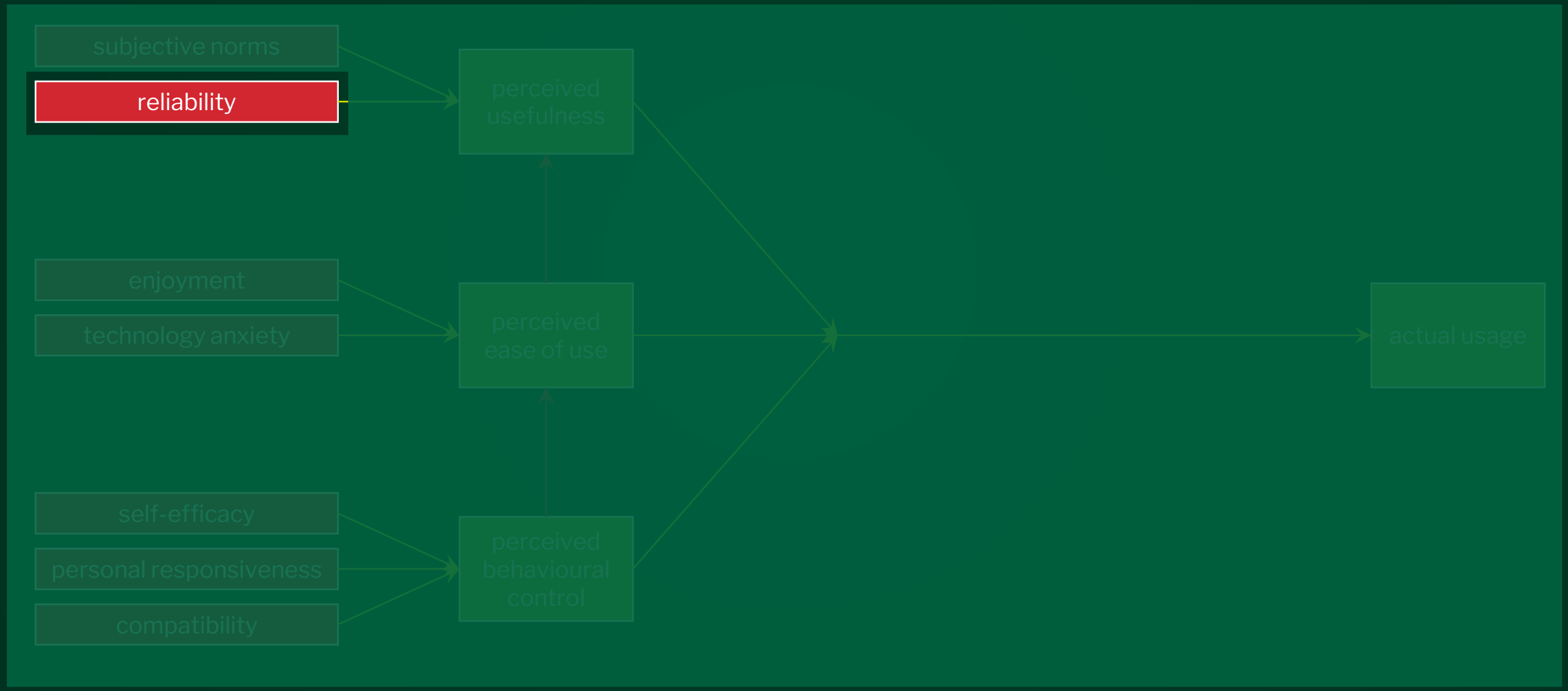

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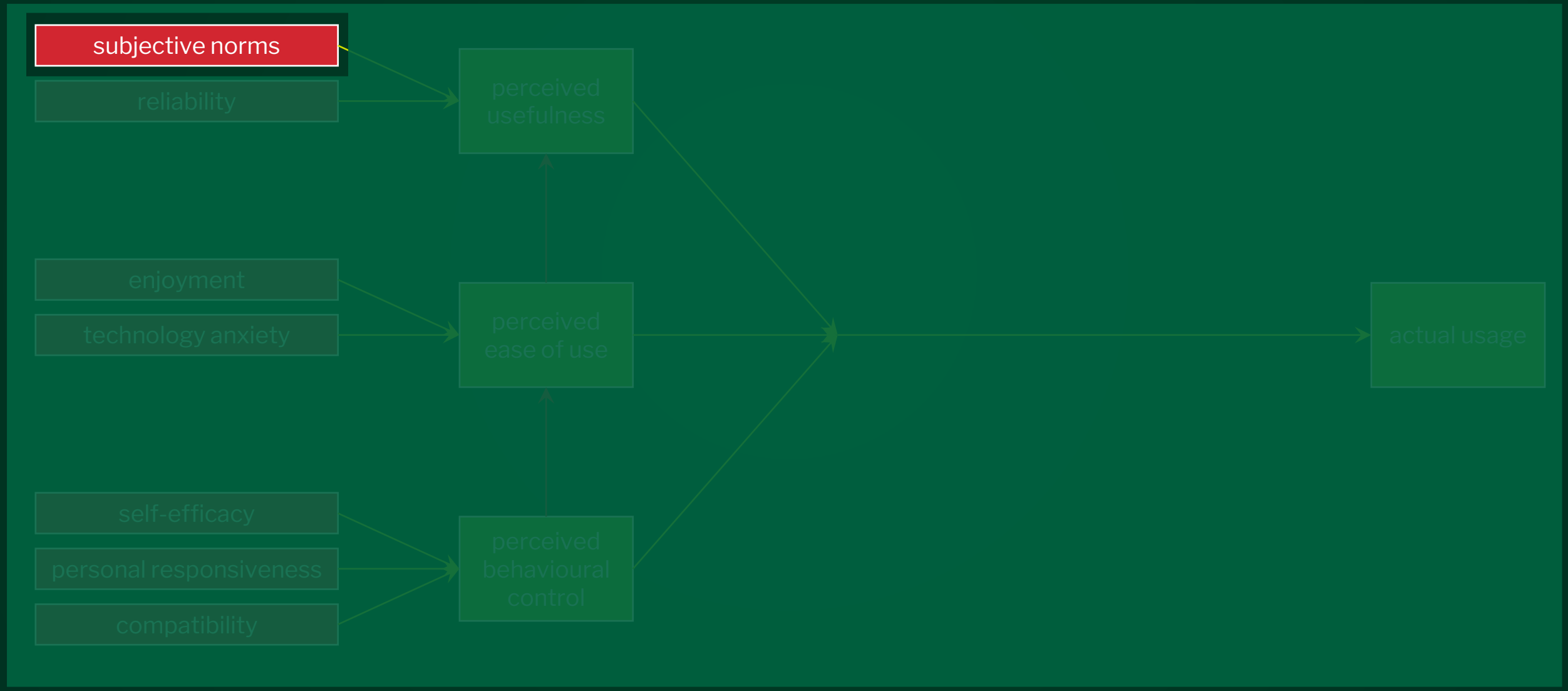

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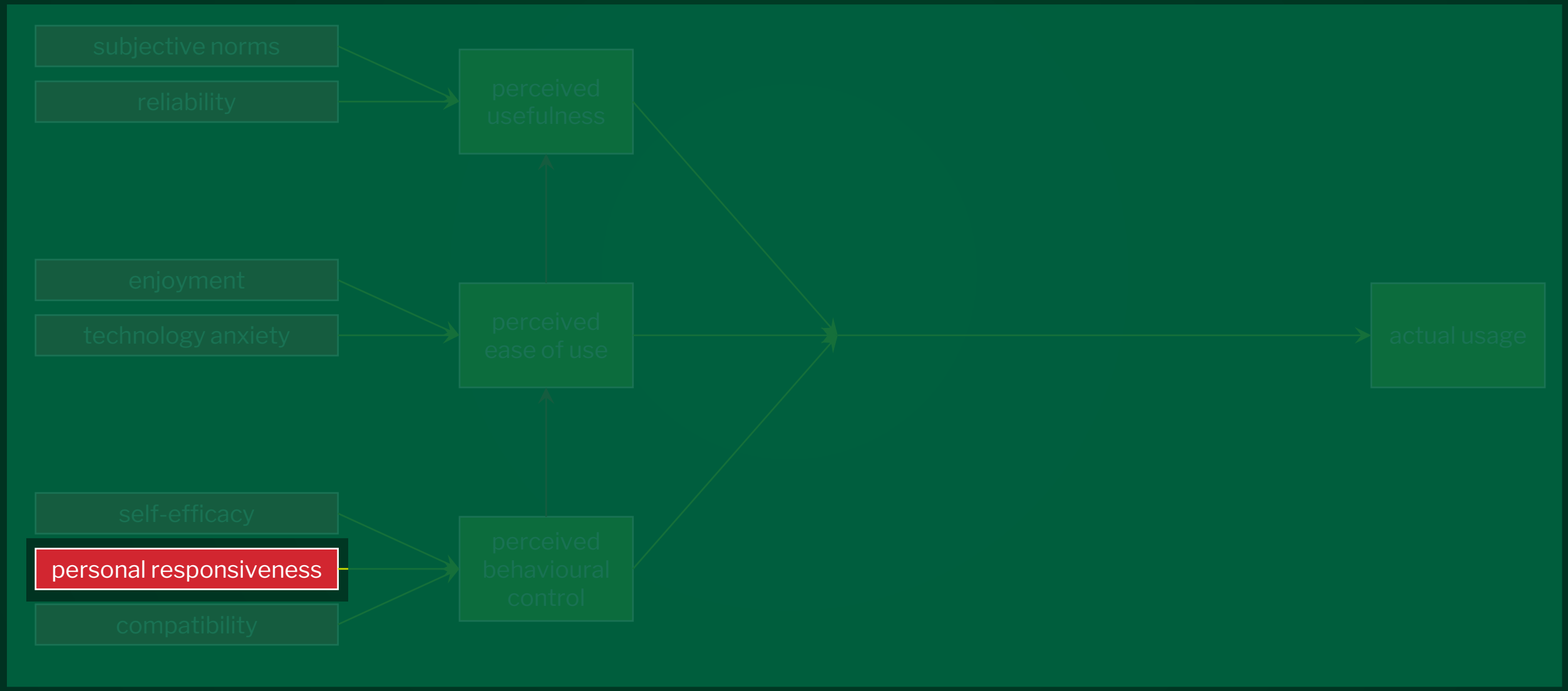

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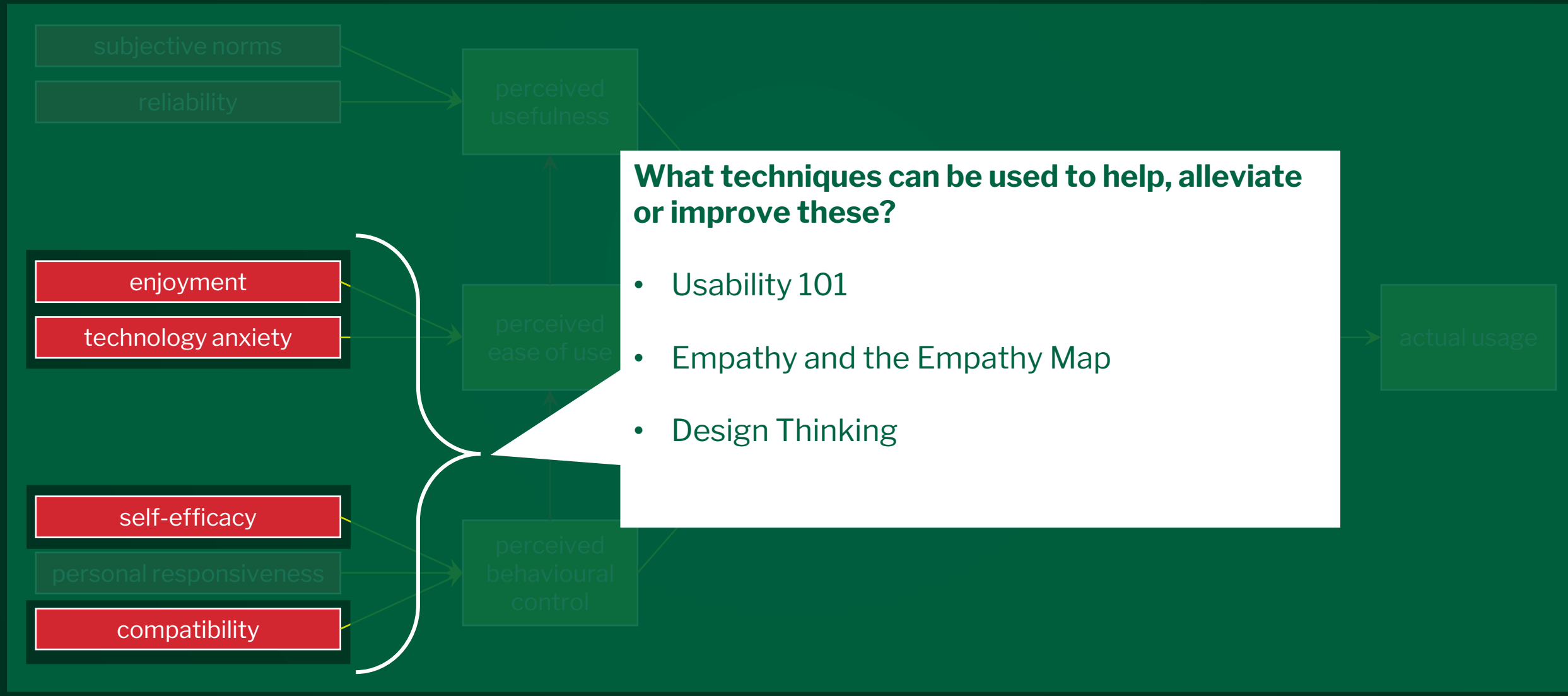


What techniques can be used to help, alleviate or improve these?

- Usability 101
- Empathy and the Empathy Map
- Design Thinking

lets start with usefulness

Usefulness, Utility, Usability: 3 Goals of UX Design (**Jakob Nielsen**)

https://youtu.be/VwgZtqTQzg8

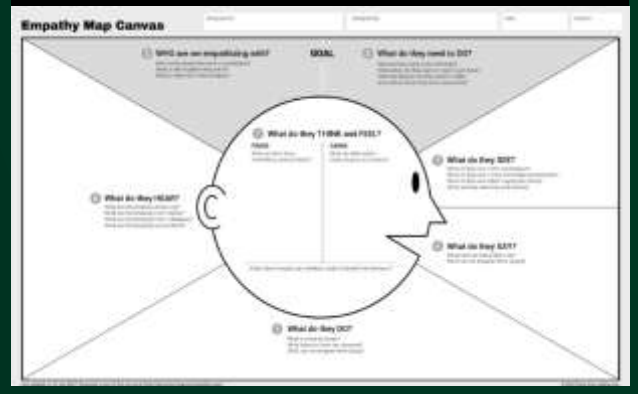
Usefulness
=
Utility
+
Usability

- **Learnability**: How easy is it for users to accomplish basic tasks the first time they encounter the design?
- **Memorability**: When users return to the design after a period of not using it, how easily can they re-establish proficiency?
- **Efficiency**: Once users have learned the design, how quickly can they perform tasks?
- **Errors**: How many errors do users make, how severe are these errors, and how easily can they recover from the errors?
- **Satisfaction**: How pleasant is it to use the design?

empathy map

How will you connect with the audiences hearts and minds?

Adapted from CX:



What do they **care about**, **think** and **feel**?

What are their **pain points**?

What are their **goals?**

What **information** do they need?

What **questions** do they need to answer?

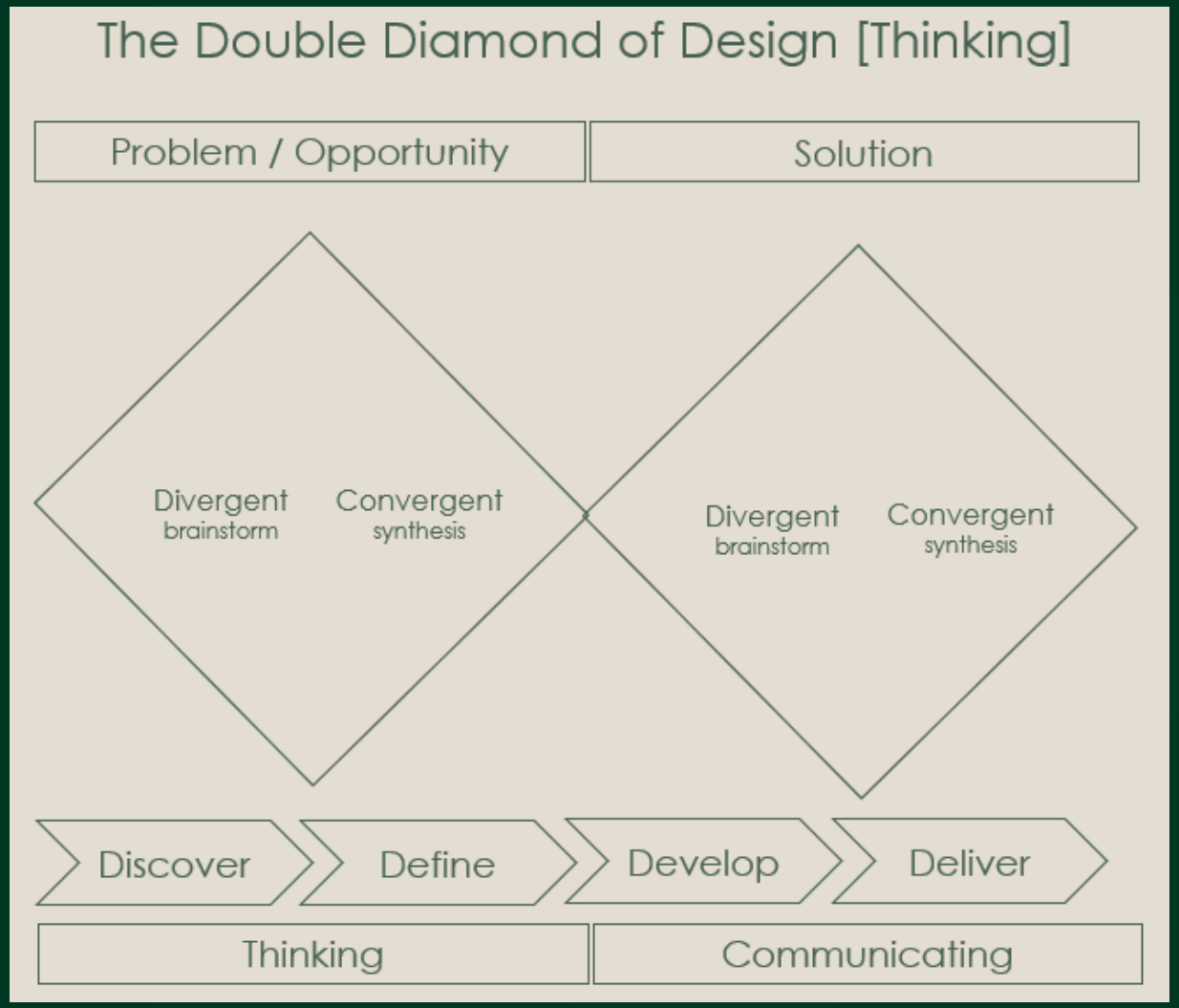
What **tasks** do they need to complete?

What **decisions** do they need to make?

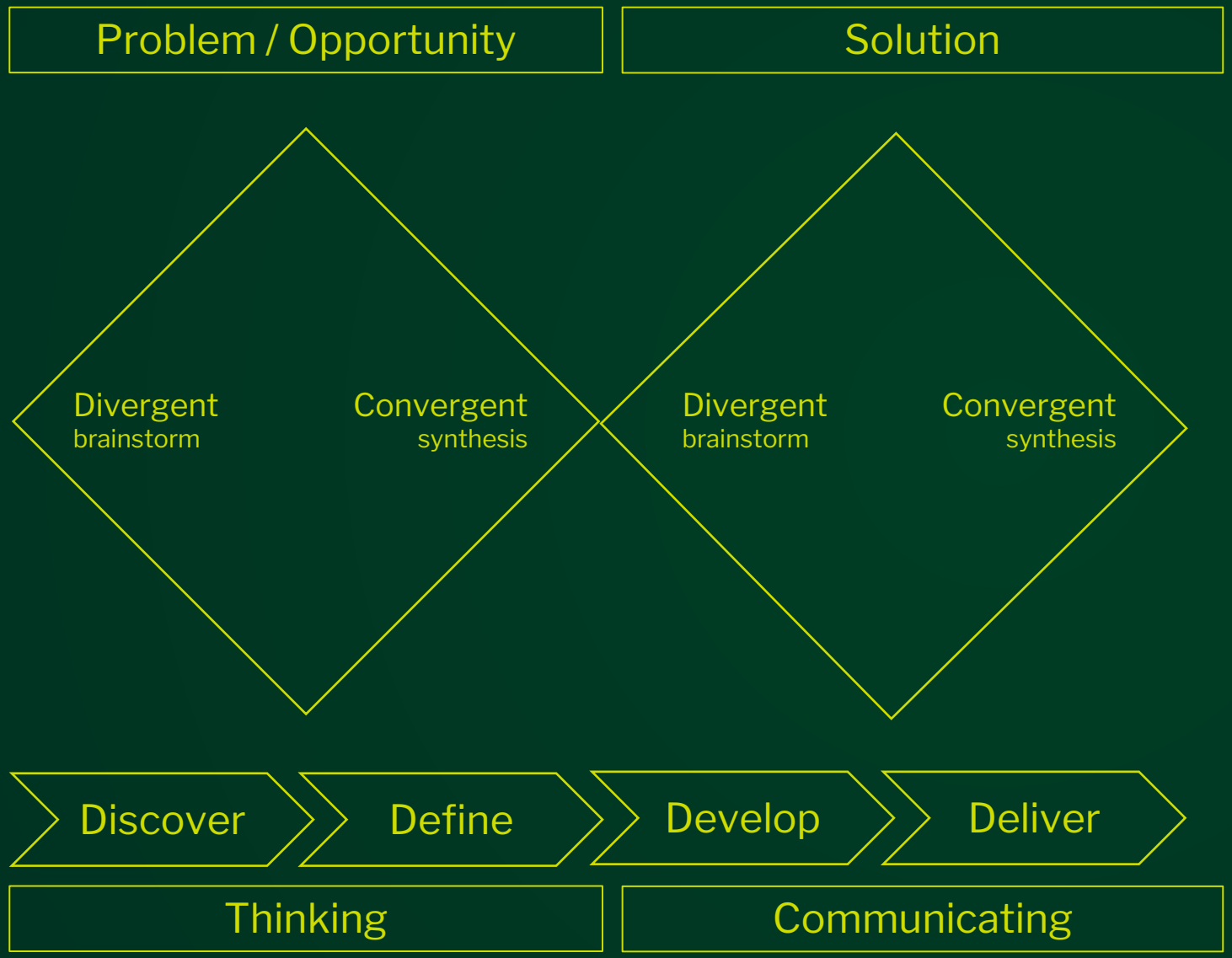
What **actions** do they need to take?

Audrey Pentz - Nedbank

Design (Thinking) - Process for Data Analysis and Data Visualisation



the double diamond of design (thinking)



the double diamond of design (thinking)

Problem / Opportunity

Solution

Divergent
brainstorm

Convergent
synthesis

Divergent
brainstorm

Convergent
synthesis

Discover

Define

Develop

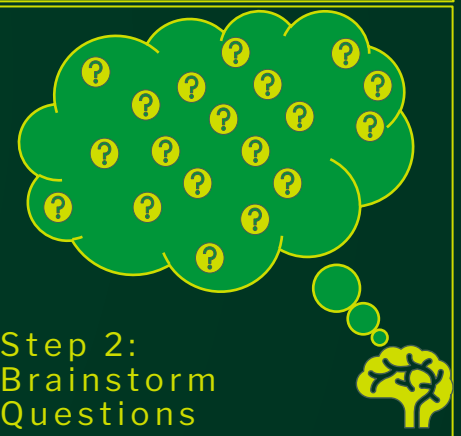
Deliver

Thinking

Communicating

All possible drivers of the problem

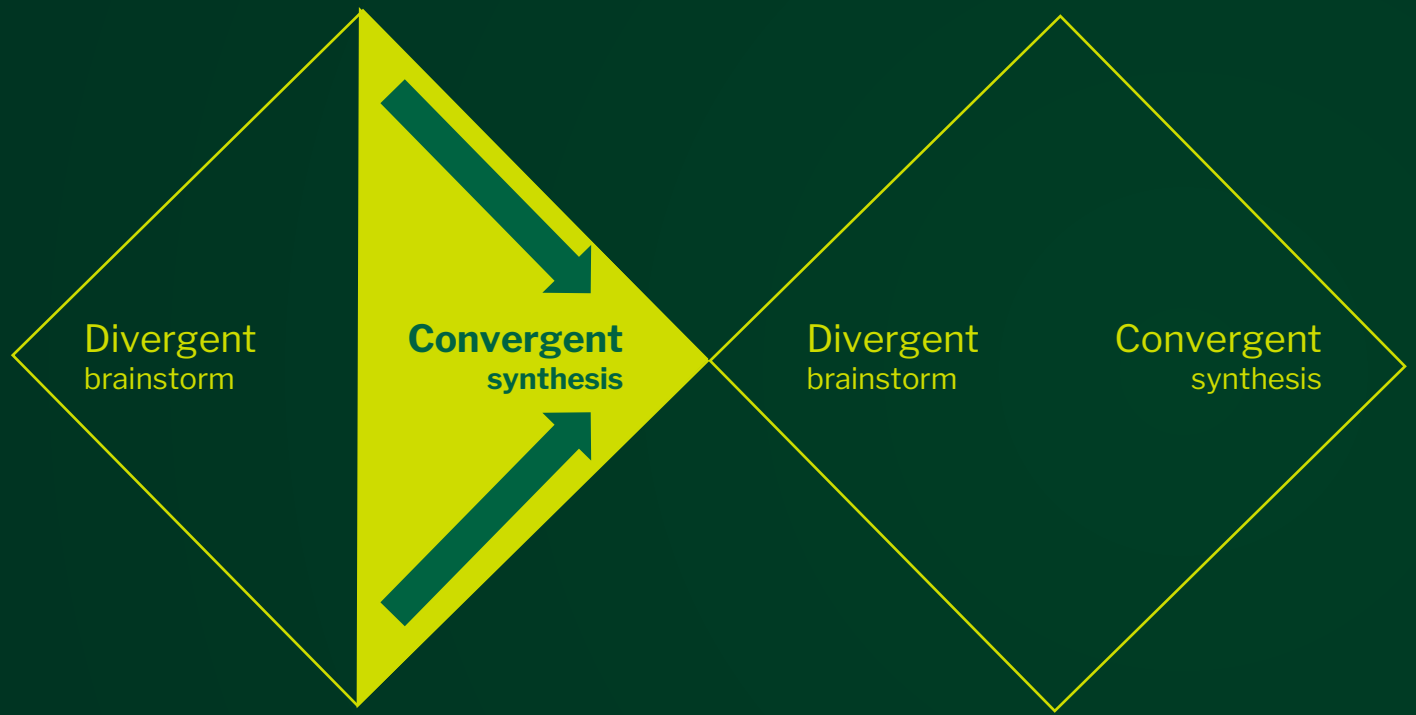
Step 1:
Empathy Map with
Audience in mind



Step 2:
Brainstorm
Questions

the double diamond of design (thinking)

Problem / Opportunity | Solution



Discover | **Define** | Develop | Deliver

Thinking | Communicating

The one big idea (driver) to solve for

Step 4:
Surface the Insights

Step 5:
Find the One Big Idea
to focus on

the double diamond of design (thinking)

Problem / Opportunity

Solution

Divergent
brainstorm

Convergent
synthesis

Divergent
brainstorm

Convergent
synthesis

Discover

Define

Develop

Deliver

Thinking

Communicating

A few potential solutions (prototypes)

Step 6:
Brainstorm
Answers

Step 7:
Prototype possible
answers

the double diamond of design (thinking)

Problem / Opportunity

Solution

Divergent
brainstorm

Convergent
synthesis

Divergent
brainstorm

Convergent
synthesis

Discover

Define

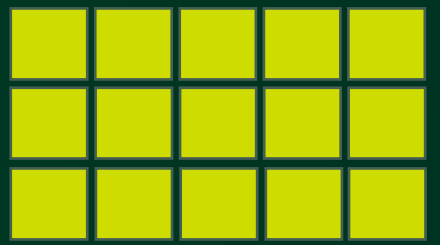
Develop

Deliver

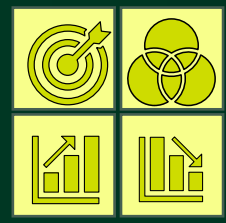
Thinking

Communicating

One solution that works



Step 8:
Storyboarding the
One Big Idea



Step 9:
Refine Prototypes
and Build the Slides

in summary

self service – how much is technical vs. human

solve the formula f(human) < perceived value

don't forget you have a team that goes through the same anxieties as your customers

you don't have colleagues that you are building stuff for – you have customers!

customers want

usefulness = utility + usability

usability ~ f(learnability, memorability, and a few others)

empathy

design thinking

thank you