

Foundation Certificate
in
Service Design Consultancy



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Contents

Introduction	3
Assessment Examination	3
Question weighting for each syllabus section	3
Syllabus	4
1. Introduction to Service Design Consultancy (15%).....	4
2. Service Design Principles and Ethics (10%).....	4
3. Initiating a Consulting Assignment (20%)	5
4. Investigating the Situation (15%).....	6
5. Appraising & Diagnosing the Situation (10%).....	6
6. Generating Options and Identifying a Solution (15%)	7
7. Generating Options and Identifying a Solution (15%)	7
Service Design Consultancy Concepts, Approaches and Techniques	9
Syllabus section 1: Introduction to Service Design Consultancy	9
Syllabus section 2: Service Design Principles and Ethics.....	11
Syllabus section 3: Initiating a Consulting Assignment.....	13
Syllabus section 4: Investigating the Situation	18
Syllabus section 5: Appraising and Diagnosing the Situation	20
Syllabus section 6: Generating Options and Identifying a Solution.....	22
Syllabus section 7: Implementing a solution	26

Introduction

This syllabus presents the learning objectives to be assessed for the A4Q Foundation Certificate in Service Design Consultancy. This Certificate assesses a candidate's ability to demonstrate an understanding of Service Design Consultancy principles, approaches and techniques.

Assessment Examination

The examination leading to the Foundation Certificate in Service Design Consultancy is based upon this syllabus and the A4Q Service Design Consultancy course materials. Candidates' knowledge and understanding of Service Design Consultancy is assessed in line with the learning objectives specified in this syllabus.

The examination leading to the Foundation Certificate in Service Design Consultancy:

- consists of 40 multiple choice questions, each of which has a value of one mark. Candidates must gain 26 marks out of the available 40 marks (65%) in order to pass the examination and be awarded the certification.
- has a duration of 60 minutes. If a candidate's first language is not the examination language, the candidate is allowed an additional 25% (15 minutes) of examination time.
- is a closed book examination and no reference materials may be used while sitting the examination.
- assesses competence at levels 1,2 and 3 of Bloom's Taxonomy of Cognitive Domains. These levels assess competence as follows:
 - K1: remember
 - K2: understand
 - K3: apply

Question weighting for each syllabus section

Syllabus area	Percentage weighting	Target number of questions
1. Introduction to Service Design Consultancy	15%	6
2. Service Design Principles and Ethics	10%	4
3. Initiating a Consulting Assignment	20%	8
4. Investigating the Situation	15%	6
5. Appraising & Diagnosing the Situation	10%	4
6. Generating Options and Identifying a Solution	15%	6
7. Implementing a Solution	15%	6
Total	100%	40

Syllabus

1. Introduction to Service Design Consultancy (15%)

Learning objectives for Introduction to Service Design Consultancy

- 1.1. Demonstrate an understanding of Service Design Consultancy
 - 1.1.1. Define the purpose of Service Design Consultancy
 - 1.1.2. Define the key goals and concepts of Service Design Consultancy
 - 1.1.3. Describe the business context for service design consultancy
 - 1.1.4. Identify the main drivers for business change
- 1.2. Demonstrate an understanding of the Service Design Consultant role
 - 1.2.1. Describe the Service Design Service Framework
 - 1.2.2. Describe the professional, personal and business skills required
 - 1.2.3. Define the aspects of the Design Mindset
 - 1.2.4. Define the Growth Mindset
- 1.3. Describe a Service Design Consultancy Service Portfolio
 - 1.3.1. Define the purpose of a Consultancy Service Portfolio
 - 1.3.2. Explain how a Consultancy Service Portfolio is created
 - 1.3.3. Identify the phases of the Service Design Consulting Lifecycle

2. Service Design Principles and Ethics (10%)

Learning objectives for Service Design Principles and Ethics

- 2.1. Identify the 3 principles of Ethical Design Solutions
- 2.2. Demonstrate an understanding of Inclusivity and Accessibility in Service Design
 - 2.2.1. Explain the terms Inclusivity and Accessibility
 - 2.2.2. Describe the Diversity Pyramid
 - 2.2.3. Identify the 3 Dimensions of Inclusive Design
- 2.3. Explain the importance of Security and Privacy in Service Design
- 2.4. Demonstrate an understanding of Sustainability in Service Design
 - 2.4.1. Explain the term Sustainability
 - 2.4.2. Define the components of a strategy for Sustainability
- 2.5. Identify the components of professional standards and codes of ethical conduct for a Service Design Consultant

3. Initiating a Consulting Assignment (20%)

Learning objectives for Initiating a Consulting Assignment

- 3.1. Explain the elements of the MANDACT model for qualifying consulting opportunities
- 3.2. Demonstrate an understanding of a Terms of Reference (ToR) document
 - 3.2.1. State the purpose of a ToR
 - 3.2.2. Define the components of the OSCAR framework
- 3.3. Demonstrate an understanding of gaining trust and establishing credibility with stakeholders
 - 3.3.1. Identify the 5 Waves of Trust
 - 3.3.2. Define the 4 Cores of Credibility
- 3.4. Demonstrate an understanding of approaches used to build rapport
 - 3.4.1. Identify techniques for making a positive first impression
 - 3.4.2. Describe the techniques for building rapport
 - 3.4.3. Explain Mehrabian's Rule
 - 3.4.4. Describe the components of an Empathy Map
- 3.5. Demonstrate an understanding of influencing
 - 3.5.1. Identify the 3 goals of influencing
 - 3.5.2. Identify the steps in the Influencing Process
 - 3.5.3. Explain the 6 Principles of Influencing and social preference
- 3.6. Demonstrate an understanding of techniques for and analysing and engaging stakeholders
 - 3.6.1. Define the quadrants of the Power/Interest Grid
 - 3.6.2. Identify the 4 Engagement Strategies
 - 3.6.3. Describe 3 techniques for managing Stakeholder expectations
- 3.7. Demonstrate an understanding of Emotional Intelligence
 - 3.7.1. Define Emotional Intelligence
 - 3.7.2. Define the 8 Primary Emotions and their purpose
 - 3.7.3. Explain the Amygdala Hijack
 - 3.7.4. Identify the 5 elements of Emotional Intelligence

4. Investigating the Situation (15%)

Learning objectives for Investigating the Situation

- 4.1. Describe the 5 components of the VMOST model
- 4.2. Explain the approaches to setting and measuring goals for organisational performance
 - 4.2.1. Define the Objectives and Key Results (OKR) performance measure
 - 4.2.2. Distinguish between Critical Success Factors (CSFs), Key Performance Indicators (KPIs) and Targets
 - 4.2.3. Describe the 4 dimensions of the Balanced Scorecard
- 4.3. Demonstrate an understanding of Service Value Propositions
 - 4.3.1. Describe the elements in a Service Value Proposition
 - 4.3.2. Describe the key steps for modelling a Service Value Stream
- 4.4. Demonstrate an understanding of Organisational Culture and Climate
 - 4.4.1. Define the 8 culture scales
 - 4.4.2. Define the term Organisational Climate and 4 example climate dimensions

5. Appraising & Diagnosing the Situation (10%)

Learning objectives for Appraising the Situation

- 5.1. Describe the types of data used to appraise a situation
- 5.2. Demonstrate an understanding of situation appraisal techniques
 - 5.2.1. Identify 7 appraisal techniques
 - 5.2.2. Describe the situational domains of the Cynefin technique
 - 5.2.3. Identify the components and purpose of a Rich Picture
 - 5.2.4. Explain the benefits of the Storytelling technique
- 5.3. Demonstrate an understanding of diagnosing techniques
 - 5.3.1. Describe the Design Council's Double Diamond
 - 5.3.2. Explain Causal Loop Diagrams
 - 5.3.3. Define the major areas for change within a business system (POPIT™)

6. Generating Options and Identifying a Solution (15%)

Learning objectives for Generating Options and Identifying a Solution

- 6.1. Demonstrate an understanding of how options are generated
 - 6.1.1. Define the purpose, benefits and structure of a Hypothesis Tree
 - 6.1.2. Define the purpose and structure of a Decision Tree
- 6.2. Demonstrate an understanding of the MECE framework for presenting options
 - 6.2.1. Define the principles of the MECE framework
 - 6.2.2. Describe the 5 rules of applying the MECE framework
- 6.3. Demonstrate an understanding of Gap Analysis
 - 6.3.1. Define gap analysis
 - 6.3.2. Distinguish between Hard and Soft Problems
 - 6.3.3. Define the difference between 'What' and 'How' relative to service design
- 6.4. Demonstrate an understanding of option appraisal
 - 6.4.1. Option appraisal fundamentals
 - 6.4.2. Describe the 3 perspectives on feasibility analysis
- 6.5. Explain the key steps in the identification, assessment and management of Risk
- 6.6. Describe the rationale for analysing the impact of a proposed solution
- 6.7. Define the key principles of the experimentation approach to testing a solution
- 6.8. Demonstrate an understanding of solution negotiation
 - 6.8.1. Explain the process of preparing for a negotiation
 - 6.8.2. Identify the 5 steps of Principled Negotiation
- 6.9. Demonstrate an understanding of conflict in service design consultancy assignments
 - 6.9.1. Define the term 'conflict'
 - 6.9.2. Identify the 5 conflict positions
 - 6.9.3. Describe the possible outcomes from a negotiation

7. Generating Options and Identifying a Solution (15%)

Learning objectives for Implementing a Solution

- 7.1. Define the roadmap for Implementing Change
- 7.2. Demonstrate an understanding of using techniques to assess business readiness
 - 7.2.1. Identify the CPPOLDAT elements
 - 7.2.2. Explain the structure and application of Force Field Analysis

- 7.3. Describe the methods for designing a transition
 - 7.3.1. Explain the use of POPIT™ when designing a transition
 - 7.3.2. Identify the elements within the McKinsey 7S model
 - 7.3.3. Identify the stages within the SARAH Curve
- 7.4. Define the 4 strategies used to implement change
- 7.5. Define the barriers to communication during change
- 7.6. Demonstrate an understanding of solution deployment
 - 7.6.1. Identify the stages in Lewin's 3 Step Model
 - 7.6.2. Identify the stages in Bridges' Model
- 7.7. Demonstrate an understanding of how change is sustained
 - 7.7.1. Identify Kotter's 8 Steps
 - 7.7.2. Identify key errors and actions

Service Design Consultancy Concepts, Approaches and Techniques

This section of the syllabus defines the key concepts, approaches and techniques within the learning objectives in this syllabus.

Syllabus section 1: Introduction to Service Design Consultancy

LO 1.1 Demonstrate an understanding of Service Design Consultancy

Define the purpose of Service Design Consultancy	Purpose: To investigate how a business's resources (people, processes, information and technology) could be leveraged to innovate the services offered by an organisation and to enhance customers' experiences when engaging with those services.
Define the key goals and concepts	<p>Key Goals: To make sure a service meets the value expectations of customers and is aligned to the needs of the business.</p> <p>Concepts: The concepts that underlie Service Design Consultancy are:</p> <ul style="list-style-type: none"> • Services are designed based on a comprehensive investigation. • Services are designed to meet customer needs balanced with the internal needs of the business. • Services are holistic and are designed using a systemic approach. • Services are designed to co-create value. • Services are designed in collaboration with all relevant stakeholders. • Services are designed iteratively and subject to continuous improvement.
Describe the business context	Business Context: The consultant must work in a collaborative way to ensure that value is co-created with stakeholders at each stage of the consultancy process. The consultant must be aware of the strategic context for their work including the trends, impacts and relationships within the organisations internal and external ecosystem.
Identify the main drivers for business change	<p>The main drivers for business change are:</p> <ul style="list-style-type: none"> • Customer expectations and requirements. • Product and service innovation. • Regulation and compliance. • Emergent technologies. • Productivity and efficiency requirements. • Competitor action.

LO 1.2 Demonstrate an understanding of the Service Design Consultant role

Describe the Service Design Consultancy Service Framework	<p>Core services:</p> <ul style="list-style-type: none"> • Situation investigation & problem analysis: Investigate root causes of problems; identify where need for service change exists and shape the Service Design project. • CX Analysis: Research voice of the customer and analyse service value expectations. • Feasibility assessment & business case development: Evaluate options for revised service; support the development of the business case for service change. • Service definition: Define service blueprint and value proposition; design service value stream; identify service capability requirements.
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	<ul style="list-style-type: none"> • Service experimentation: Design and develop service prototypes on the basis of hypotheses; elicit and analyse qualitative and quantitative feedback. • Service deployment: Support service deployment; monitor feedback from service customers and delivery staff; maintain service. • Stakeholder Engagement is an auxiliary service. It is integral to the delivery of the 6 core services.
Describe the professional, personal and business skills required	<p>The professional skills required are:</p> <ul style="list-style-type: none"> • Requirements Definition. • Service Design Methods. • Digital Literacy. • CX Analysis. • Business Process Improvement. • Service Architecture. • Stakeholder Engagement. <p>The key personal skills required are:</p> <ul style="list-style-type: none"> • Facilitation. • Presentation. • Collaboration. • Communication. • Influencing. • Negotiation. • Conflict management <p>The key business skill is Business acumen.</p>
Define the aspects of the Design Thinking Mindset	<p>The 5 aspects of the Design Thinking Mindset are:</p> <ul style="list-style-type: none"> • Collaboration. • Outcome Focus. • Creativity. • Experimentation. • Customer Centricity.
Define the Growth Mindset	A Growth Mindset is the belief that abilities can be developed.

LO 1.3 Describe a Service Design Consultancy Service Portfolio

Define the purpose of a Consultancy Service Portfolio	To provide a definition of the available services within a particular service design consultancy context.
Explain how a Consultancy Service Portfolio is created	<p>The consultant should complete the following steps in the creation of a Consultancy Service Portfolio:</p> <ul style="list-style-type: none"> • Identify potential service offerings. • Identify possible customers and their needs. • Define the value proposition for each service offering. • Define the value stream, processes and approaches used to deliver each service.
Identify the phases of the Service Design	<p>The phases of the Service Design Consulting lifecycle are:</p> <ul style="list-style-type: none"> • Initiating the assignment. • Investigating the situation. • Diagnosing the situation.

Consulting Lifecycle	<ul style="list-style-type: none"> • Generating and evaluating options. • Negotiating a solution. • Implementing the solution. • Evaluating the assignment.
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Syllabus section 2: Service Design Principles and Ethics

LO 2.1 Identify the 3 principles of Ethical Design Solutions

Identify the 3 principles of Ethical Design Solutions	<p>The 3 principles of Ethical Design Solutions are:</p> <ul style="list-style-type: none"> • Inclusivity and Accessibility. • Security and Privacy. • Sustainability.
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LO 2.2 Demonstrate an understanding of Inclusivity and Accessibility in Service Design

Explain the terms Inclusivity and Accessibility	<p>Inclusivity: Design that considers the full range of human diversity with respect to ability, language, culture, gender, age, and other forms of human difference. (Inclusive Design Research Centre)</p> <p>Accessibility: An attribute of inclusive design and refers to the specific qualities that make a service open to all customers.</p>
Describe the Diversity Pyramid	<p>The Diversity Pyramid models the full range of ability variation within a target group. The pyramid can be segmented to identify the various categories of customers and their level of difficulty in accessing a service.</p> <div data-bbox="630 1131 1165 1585" data-label="Diagram"> <p>The diagram is a pyramid divided into four horizontal sections. From top to bottom, the sections are labeled: 'Severe difficulties', 'Mild difficulties', 'Minimal difficulties', and 'No difficulties'. A black arrow points upwards from the 'Mild difficulties' section, with the word 'Extend' written vertically next to it.</p> </div> <p style="text-align: center;">The Diversity Pyramid</p>
Identify the 3 Dimensions of Inclusive Design	<p>The 3 dimensions of Inclusive Design are:</p> <ul style="list-style-type: none"> • Recognise user diversity and uniqueness. • Employ inclusive design processes and tools. • Seek broader beneficial impact.

LO 2.3 Explain the importance of Security and Privacy in Service Design

Explain the importance of Security and Privacy in Service Design	The Service Design Consultant should ensure that the personal information of customers is kept secure, used responsibly and in alignment with local policies, standards and regulations. Security and privacy aren't just 'one of' the steps in the service design journey, but something that should be embedded at every step.
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LO 2.4 Demonstrate an understanding of Sustainability in Service Design

Explain the term Sustainability	An approach to economic development that meets the needs of the present without compromising the ability of future generations to meet their own needs (United Nations Brundtland Commission, 1987).
Define the components of a strategy for sustainability	A strategy for sustainability in service design may include: <ul style="list-style-type: none"> • Measuring power consumption in service provision. • Increasing utilisation of existing infrastructure. • Improving capacity planning. • Improving efficiency. • Extending the life of assets by re-using both within the organisation, and externally. • Analysing all waste in service provision. • Ensuring and validating sustainable disposal of all equipment and materials.

LO 2.5 Identify the components of professional standards and codes of ethical conduct for a Service Design Consultant

Identify the components of professional standards and codes of ethical conduct for a Service Design Consultant	Professional Standards provide a: <ul style="list-style-type: none"> • Common set of rules or standards. • Basis for regulatory compliance. • Legal standard for behaviour. Codes of Conduct determine: <ul style="list-style-type: none"> • Responsibilities to the Public Interest. • Responsibilities to the Customer Interest. • Responsibilities to the Law. • Professional Competence and Integrity. • Responsibility to the Advancement of the Profession. • Commitment to Ongoing Professional Development.
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Syllabus section 3: Initiating a Consulting Assignment

LO 3.1 Explain the elements of the MANDACT model for qualifying consulting opportunities

<p>Explain the elements of the MANDACT model for qualifying consulting opportunities</p>	<p>The elements of MANDACT are:</p> <ul style="list-style-type: none"> • Money: Is money budgeted to pay for the assignment and any possible solution? • Authority: Is the stakeholder a decision maker? Do they have sufficient influence over the decision maker? • Need: Is the completion of the assignment a priority? Are stakeholder needs clear? • Decision Criteria: Is the basis for making the decision on whether to proceed with the assignment clear? • Ability: Is it possible to satisfy the needs of the stakeholders relative to the assignment? Does the consultant have the necessary tools, skills and knowledge to deliver the assignment? • Competition: Is there competition (internal or external) for the completion of the assignment? Are there competing ideas (including 'do nothing')? • Timing: Is timing for the delivery of the assignment clear?
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LO 3.2 Demonstrate an understanding of a Terms of Reference (ToR) document

<p>State the purpose of a ToR</p>	<p>The ToR is the document that underpins the initiation of a consultancy assignment and agrees the elements between all parties.</p>
<p>Define the components of an OSCAR framework</p>	<p>The components of the OSCAR framework are:</p> <p>Objectives: The business and assignment objectives.</p> <ul style="list-style-type: none"> • Business Objectives: These summarise the overall business objectives to be achieved through the assignment. They should have been subject to a formal cost-benefit analysis in the initial stages of project investigation and been approved as a business case. • Assignment Objectives: These are more focused than the business objectives and describe in general terms what the assignment is to achieve. <p>Scope: The scope definition expands the assignment's objectives and makes them more specific.</p> <p>Constraints: The restrictions that apply to the assignment, and which will shape or limit what the consultants can and cannot do. Constraints may include standards to be followed, methods or suppliers to be used or timescales to be met.</p> <p>Authority: The individual(s) with overall authority for decisions relative to the assignment.</p> <p>Resources: The resources made available to a consultant that will enable them to achieve the assignment's objectives.</p>

LO 3.3 Demonstrate an understanding of gaining trust and establishing credibility with stakeholders

Identify the 5 Waves of Trust	The 5 Waves of Trust are: <ul style="list-style-type: none"> • Self-Trust. • Relationship Trust. • Organisational Trust. • Market Trust. • Societal Trust.
Define the 4 Cores of Credibility	The 4 Cores of Credibility are: <ul style="list-style-type: none"> • Integrity. • Capability. • Intent. • Results.

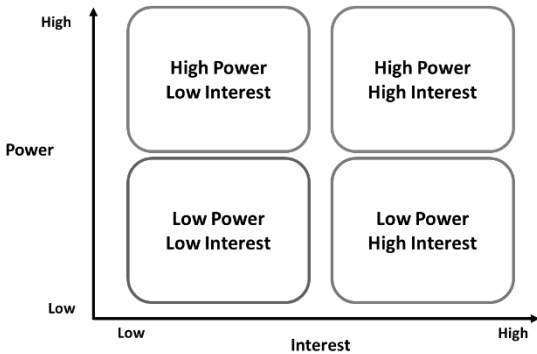
LO 3.4 Demonstrate an understanding of approaches used to build rapport

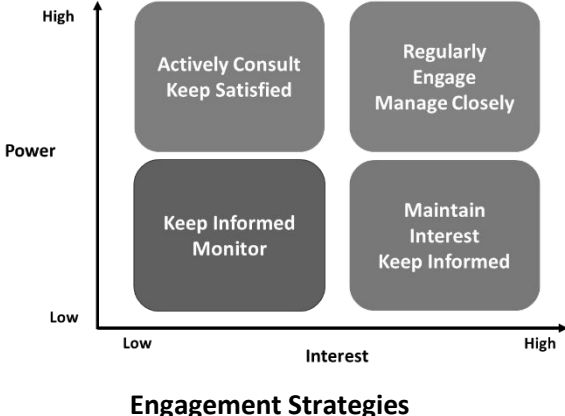
Identify techniques for making a positive first impression	Techniques for making a good first impression include: <ul style="list-style-type: none"> • Be on time. • Arrive prepared. • Dress appropriately. • Smile. • Manage nerves. • Engage in small talk. • Be polite and attentive. • Listen actively.
Describe the techniques for building rapport	The techniques for building rapport include: <ul style="list-style-type: none"> • Find common ground. • Remove threat. • Maintain eye contact. • Mirror body language. • Respond positively. • Show recognition. • Don't interrupt. • Adopt similar speech patterns. • Reduce negativity.
Explain Mehrabian's Rule	Mehrabian's rule defines the 3 Vs (the core elements) in human face-to-face communication, which are: <ul style="list-style-type: none"> • Verbal - Words (7%). • Vocal - Tone of Voice (38%). • Visual - Body Language (55%).
Describe the components of an Empathy Map	A technique used to explore and document customer perspectives, responses and feelings. The components are: <ul style="list-style-type: none"> • What the customer sees. • What the customer hears. • What the customer says. • What the customer does. • What the customer thinks & feels.

LO 3.5 Demonstrate an understanding of Influencing

<p>Identify the 3 Goals of influencing</p>	<p>The goals of influencing are:</p> <ul style="list-style-type: none"> • Affiliation: The desire to be liked by others. • Accuracy: The desire to 'do the right thing'. • Maintaining positive self-concept: The desire to maintain a holistic personal identity.
<p>Identify the steps in the Influencing Process</p>	<p>The steps in the Influencing Process are:</p> <ul style="list-style-type: none"> • Define your goal. • Prepare your message. • Deliver it. • Gain commitment.
<p>Explain the 6 Principles of Influencing and social preference</p>	<p>The 6 principles of Influencing and Social Preference are:</p> <ul style="list-style-type: none"> • Liking: Successful influencers uncover similarities and build rapport with others. • Social Proof: Successful influencers imply everyone is moving in the same direction. The more people believe that there are others doing something, the more they will feel that it is acceptable. • Consistency: Successful influencers are consistent in their messages. This creates a positive self-concept of honesty, strength and dependability. • Scarcity: Successful influencers create a sense of limited opportunity. The assumption is that people want what they can't or assume that they can't have. • Authority: Successful influencers leverage their knowledge and expertise to establish a position of authority. This appeals to individuals wanting to 'do the right thing'. • Reciprocity: Successful influencers are aware that social conditioning leads to a position where if someone has done something for us, we are more likely to reciprocate and do something for them in return. In consultancy this driver can be leveraged by solving an issue for a person. In return, they will often offer their support for an initiative.

LO 3.6 Demonstrate an understanding of techniques for and analysing and engaging stakeholders

<p>Define the quadrants of the Power/Interest grid</p>	<p>The quadrants of the Power/Interest grid are:</p> <ul style="list-style-type: none"> • High Power/ High Interest. • High Power/Low Interest. • Low Power/High Interest. • Low Power/Low Interest. <div style="text-align: center;">  <p>Quadrants of the Power Interest Grid</p> </div>
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<p>Identify the 4 Engagement Strategies</p>	<p>The 4 engagement strategies are:</p> <ul style="list-style-type: none"> • Regularly engage, manage closely. • Actively consult, keep satisfied. • Maintain interest, keep informed. • Keep informed, monitor.  <p style="text-align: center;">Engagement Strategies</p>
<p>Describe 3 techniques for managing Stakeholder Expectations</p>	<p>The 3 techniques for managing Stakeholder Expectations are:</p> <ul style="list-style-type: none"> • Containment: The objective of containment is to help the customer understand more clearly exactly what is to be delivered and what is not, what can be achieved within the constraints of the assignment specification and what cannot. • Escalation to Change: The objective of escalation to change is to make sure that the stakeholder recognises that the request is not covered by the current specification but could be delivered subject to an agreed design variation. This requires a two-stage process: <ul style="list-style-type: none"> ○ Securing agreement that the requirement is outside the scope of the current specification. ○ Discussing and agreeing the impact - time, cost and quality/performance - on the design process. • Escalation to Conflict: The objective of escalation to conflict is first to ensure that all parties understand that there is a conflict. Conflict management mechanisms are then used to resolve the situation.

LO 3.7 Demonstrate an understanding of Emotional Intelligence

<p>Define Emotional Intelligence</p>	<p>Emotional intelligence (EI) is the ability to understand and manage your own emotions, and those of the people around you. People with a high degree of emotional intelligence know what they're feeling, what their emotions mean, and how these emotions can affect other people.</p>
<p>Define the 8 Primary Emotions and their purpose</p>	<p>The 8 primary emotions and their purpose:</p> <ul style="list-style-type: none"> • Anger: To fight against problems. • Fear: To protect us from danger. • Anticipation: To look forward and plan. • Surprise: To focus on new situations. • Joy: To remind us of what's important. • Sadness: To connect us with those we love. • Trust: To connect with people who help. • Disgust: To reject what is unhealthy.

Explain the Amygdala Hijack	An immediate emotional response to a situation or context.
Identify the 5 elements of Emotional Intelligence	<p>The 5 elements of Emotional Intelligence are:</p> <ol style="list-style-type: none"> 1. Self-awareness <ul style="list-style-type: none"> • Being able to read own emotions & recognising their impact. • Using 'gut sense' as well as data in decision-making. • Knowing personal strengths and limitations. • Possessing a sound sense of self-worth and capabilities. 2. Self-regulation <ul style="list-style-type: none"> • Keeping disruptive impulses under control. • Displaying honesty, trustworthiness, and integrity. • Flexibility in adapting to changing situations or overcoming obstacles. • Driving to improve performance to inner standards of excellence. • Readiness to seize opportunities and act. • Seeing the upside in unsettling events. 3. Motivating Yourself <ul style="list-style-type: none"> • Working to develop and build self-confidence. • Believing that it is possible to succeed. • Using the power of positive thinking to bridge the gap between wanting something and getting it. • Determining personal direction through effective goal-setting – and learning to prioritise. • Showing resilience in the face of setbacks. • Building a supportive work environment. • Checking in regularly on personal motivation levels. 4. Social Awareness <ul style="list-style-type: none"> • Empathy - sensing others' emotions, understanding their perspective and taking active interest in their concerns. • Organisational awareness - reading the currents, knowing the decision networks and politics in play at the organisational level. • Service - recognising and meeting team, stakeholder and vendor needs. 5. Social Skills <ul style="list-style-type: none"> • Guiding and motivating with a compelling vision. • Employing a range of tactics for persuading stakeholders. • Bolstering team abilities through feedback and guidance. • Resolving disagreements. • Cultivating and maintaining a wide network of relationships. • Co-operation and team building.

Syllabus section 4: Investigating the Situation

LO 4.1 Describe the 5 components of the VMOST model

<p>Describe the 5 components of the VMOST model</p>	<p>The 5 components of the VMOST model are:</p> <ul style="list-style-type: none"> • Vision: The vision statement defines the target state of the organisation without regard to how this will be achieved. It is typically long-term and aspirational. The target state 'vision' is achieved through the completion of the 'mission'. • Mission: The mission describes what the organisation does or what it will do. It provides a broad description of what the organisation will do in order to achieve its 'vision'. • Objectives: The specific objectives or outcomes that the organisation wants to achieve. Objectives are used to guide and measure progress towards the organisation's vision and completion of the mission. To be useful, they should be SMART (specific, measurable, achievable, relevant (to the mission) and time-bound). • Strategy: The long-term approach chosen by the organisation to achieve its vision, mission and objectives. • Tactics: The shorter-term, specific and more detailed means of implementing the strategy. Tactics are often adapted when feedback regarding the success of the strategy is received.
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LO 4.2 Explain the approaches to setting and measuring goals for organisational performance

<p>Define the Objectives and Key Results (OKR) performance measure</p>	<p>OKR: Consists of a goal (Objective) and 3-5 measures (Key Results) that track progress towards the completion of the goal.</p>
<p>Distinguish between Critical Success Factors (CSFs), Key Performance Indicators (KPIs) and Targets</p>	<p>CSF: An area of activity that must be performed well for the organisation to achieve its goals. CSFs must be aligned with the VMOST for the organisation.</p> <p>KPI: A quantifiable area of measurement that is monitored to determine whether or not a CSF is on track to be achieved.</p> <p>Target: A value that is specified for a KPI and is used to evaluate whether or not the KPI has been achieved.</p>
<p>Describe the 4 dimensions of the Balanced Scorecard</p>	<p>The 4 dimensions of the Balanced Scorecard are:</p> <ul style="list-style-type: none"> • Financial: This perspective includes traditional financial indicators such as revenue, costs, profits and return on assets. • Customer: This perspective could include metrics such as customer retention, customer satisfaction, customer acquisition, and customer profitability. • Internal Business Process: This perspective relates to operational efficiency, and typically includes metrics related to quality, time and cost reduction. • Learning and Growth: This perspective relates to investment in products/services, the level of innovation and staff development and training.

LO 4.3 Demonstrate an understanding of Service Value Propositions

<p>Describe the elements in a Service Value Proposition</p>	<p>The key elements in a Service Value Proposition are:</p> <ul style="list-style-type: none"> • Functionality: The features offered by the product or service. • Price: The amount charged for the product or service. • Quality: The level of performance offered by the product or service. The level of quality depends upon the product or service but typical quality aspects include robustness, accuracy and speed. • Choice: The potential selection, customisation and personalisation of the product or service. • Availability: The level of responsiveness when dealing with customer requests for products or services. • Image or Brand: The image or brand of the organisation and its perception by customers. Such perception may enhance the key features offered by a product or service and increase the customers' desire to engage with an organisation and purchase its products or services. • Relationships: The relationships between the organisation and its customers. This relates directly to the experience offered by an organisation (and encountered by customers) throughout the entire customer journey.
<p>Describe the key steps for modelling a Service Value Stream</p>	<p>The key steps for modelling a Service Value Stream are:</p> <ul style="list-style-type: none"> • Identify the value expected by a specific stakeholder • Explore the nature of the value that is required or expected • Work backwards to identify the key stages that lead to the provision of this value. This is continued until the triggering event is reached • Identify interim stakeholders and explore their value requirements or expectations.

LO 4.4 Demonstrate an understanding of Organisational Culture and Climate

<p>Define the 8 culture scales</p>	<p>The 8 culture scales are:</p> <ul style="list-style-type: none"> • Communicating: This scale measures the extent to which communication is precise, simple, explicit and clear (low context) in contrast to communication which is sophisticated, nuanced, layered and open to interpretation (high context). • Deciding: This scale measures the degree to which a culture is consensus minded. • Evaluating: This scale measures a preference for frank versus diplomatic negative (critical) feedback. • Trusting: This scale measures the extent of cognitive trust (from the head) in contrast to affective trust (from the heart). • Persuading: This scale measures the extent to which persuasion is focussed on holistic arguments against specific arguments. • Disagreeing: This scale measures tolerance for open disagreement and inclination to see it as either helpful or harmful to relationships. • Leading: This scale measures the degree of respect and deference shown to authority figures, placing countries on a spectrum from egalitarian to hierarchical. • Scheduling: This scale assesses how much value is placed on operating in a structured, linear fashion versus being flexible and reactive.
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<p>Define the term Organisational Climate and 4 example climate dimensions</p>	<p>Organisational Climate: The meaning and behaviour attached to policies, practices and procedures employees experience.</p> <p>Example climate dimension are:</p> <ul style="list-style-type: none"> • Safety climate: This relates to the shared perceptions that employees hold towards procedures and practices which contribute towards workplace safety. Considerations include the extent to which psychological safety is commonplace and whether the organisation emphasises blaming and punishing or learning from mistakes. • Innovation climate: This relates to the shared perceptions that employees hold towards procedures and practices which encourage and enhance innovation. Considerations include openness to change, desire and support for new ideas and the use of creative problem solving. • Learning climate: This relates to the shared perceptions that employees hold towards procedures and practices which support learning. Considerations include access to training and resources, the extent of leadership and supervisor support towards learning. • Ethical climate: This relates to the shared perceptions that employees hold towards procedures and practices that influence decision making and whether certain behaviours are tolerated. Considerations include whether individuals personal ethics are respected, the extent to which stakeholder interests are regarded as important.
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Syllabus section 5: Appraising and Diagnosing the Situation

LO 5.1 Describe the types of data used to appraise a situation

<p>Describe the types of data used to appraise a situation</p>	<p>The two types of data are:</p> <ul style="list-style-type: none"> • Qualitative data is data that is non-numeric. For example, opinions and preferences, such as a favourite product/service or provider. • Quantitative data is numeric and can be divided into <i>discrete</i> and <i>continuous</i> data: <ul style="list-style-type: none"> ○ <i>discrete</i> – data can only take specific numeric values, for example shoe size, number of customers and number of cars sold in a week. ○ <i>continuous</i> – data can take any numerical value, for example height and weight.
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LO 5.2 Demonstrate an understanding of situation appraisal techniques

<p>Identify 7 appraisal techniques</p>	<p>Appraisal techniques include:</p> <ul style="list-style-type: none"> • Background Research. • Interviews. • Workshops. • Observation. • Sampling. • Surveys. • Document Analysis.
<p>Describe the situational domains of the</p>	<p>Cynefin is a framework that helps categorise situations into domains or “contexts” defined by cause-and-effect relationships. This helps to assess a</p>

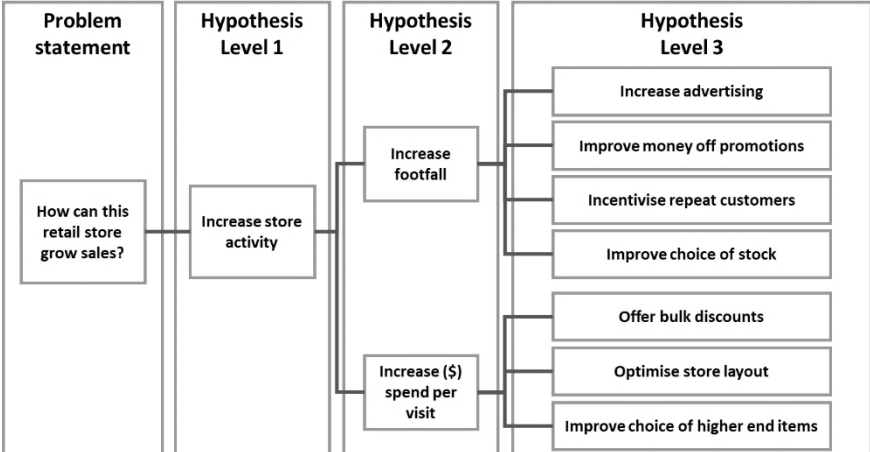
<p>Cynefin technique</p>	<p>situation more accurately and to determine the appropriate response. The Cynefin situational domains are:</p> <ul style="list-style-type: none"> • Clear: This dimension includes situations where patterns of behaviour can be recognised and there are clear cause-and-effect relationships between events and effects. All the salient facts are known, and rational decisions can be based on them. In this situation, the leader's role is to understand that there is a problem, state what must be done, and delegate detailed implementation. • Complicated: This dimension includes situations where the causes and effects are less obvious. Once a problem has been identified it is necessary to analyse it and to discover its root causes. In this context, while there are unknowns to worry about and probe, it is known that they exist. Once the analysis has been carried out, decisions must be taken on what to do and choices must be made between conflicting solutions. • Complex: This dimension includes situations where there are no 'right' answers, and the leader must probe for a solution. As a result, there is a need for creativity and awareness that there are 'unknown unknowns' that can disrupt the work. The solution is 'emergent', often arrived at through experimentation and dissent. • Chaotic: This dimension includes situations where 'something must be done' and the need is for quick, decisive action, and to restore order even if the solutions prove not to be optimal in the longer term. The consultant must be prepared to receive feedback and change course if the results are disappointing or do not meet expectations. Pragmatism is preferable to factual certainty in a chaotic situation. Because there is no precedent for guidance, the solutions arrived at are usually novel.
<p>Identify the components and purpose of a Rich Picture</p>	<p>A Rich Picture is a free-format visual technique for documenting the entire current state business situation. The technique includes use of symbols, emojis and pictures, supplemented by text, to build a holistic drawing of the situation.</p> <p>The components include:</p> <ul style="list-style-type: none"> • Information on the primary stakeholders involved in the business process or system. • Information on the beliefs, ideas, feelings and opinions of the primary stakeholders. • Information on any conflict, problems or issues • Information on the structure, processes and culture of the organisation.
<p>Explain the benefits of the Storytelling Technique</p>	<p>Storytelling is focussed on obtaining insight through the sharing and subsequent analysis of stories. In addition to providing insight into the individual's perspective, the storytelling approach provides insight into organisational culture.</p> <p>Through applying the storytelling technique, a service design consultant can engage with emotions and underlying meaning. The aim of the technique is not to gain factual evidence but to understand patterns of behaviour and cultural norms within the organisation.</p>

LO 5.3 Demonstrate an understanding of diagnosing techniques

<p>Define the Design Council's Double Diamond</p>	<p>The Design Council's Double Diamond provides a framework for exploring an issue widely or deeply (using divergent thinking) and then taking focused action (using convergent thinking).</p> <p>The 4 dimensions are:</p> <ul style="list-style-type: none"> • Discover. The first diamond helps the service design consultant understand, rather than simply assume, what the problem is. It involves speaking to and spending time with people (customers, staff, suppliers) who are affected by the issues. • Define. The insights gathered from the discovery phase enables the consultant to define the challenge in a different way. • Develop. The second diamond encourages different answers to the clearly defined problem, seeking inspiration from elsewhere and co-designing a solution with a range of different people (including customers). • Deliver. Delivery involves testing out different solutions at small-scale, rejecting those that will not work and improving the ones that will.
<p>Explain Causal Loop Diagrams</p>	<p>Causal loop diagrams (CLD) are a method of analysis used to develop an understanding of complex systems. They identify the key variables in a system and indicate the causal relationships between them via links.</p>
<p>Define the major areas for change within a business system (POPIT™)</p>	<p>The areas in POPIT™ are:</p> <ul style="list-style-type: none"> • People • Organisation • Information and Technology • Processes

Syllabus section 6: Generating Options and Identifying a Solution

LO 6.1 Demonstrate an understanding of how options are generated

<p>Define the purpose, benefits and structure of a Hypothesis Tree</p>	<p>A Hypothesis Tree is a form of problem-solving that starts with the answer (the hypothesis) and works backward to prove or disprove that answer.</p> <p>The Hypothesis Tree presents:</p> <ul style="list-style-type: none"> • A primary hypothesis to answer the question (Level 1). • Sub-hypotheses to support the hypothesis (Levels 2 & 3). • Each layer uses the MECE framework (Mutually Exclusive, Comprehensively Exhaustive) to examine and support the previous hypothesis. 
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Example Hypothesis tree for a retail store needing to increase sales	
<p>Define the purpose and structure of a Decision Tree</p>	<p>Decision Trees start with a problem statement or question (the Root). The tree then expands out into potential steps or actions (the Branches) and ends with outcomes (the Leaves).</p> <p>A decision tree allows the consultant to quickly visualise a multitude of scenarios and possible consequences and benefits.</p> <div style="text-align: center;"> <pre> graph TD Root[Is the service improvement in scope for this release?] -- Yes --> Node1[Is the timescale feasible?] Root -- No --> Node2[Is the improvement a strategic priority?] Node1 -- Yes --> Leaf1[Deliver service improvement] Node1 -- No --> Leaf2[Discuss with sponsor] Node2 -- Yes --> Leaf2 Node2 -- No --> Leaf3[Add to service improvement backlog] </pre> </div>

LO 6.2 Demonstrate and understanding of the MECE framework for presenting options

<p>Describe the principles of the MECE framework</p>	<p>The MECE (Mutually Exclusive Collectively Exhaustive) framework is used to solve large and/or complex problems. Categories are defined that are relevant to the problem. The principles are:</p> <ul style="list-style-type: none"> • Mutually Exclusive (do not overlap). • Collectively Exhaustive (cover all possible aspects).
<p>Describe 5 rules of applying the MECE framework</p>	<p>There are Five rules when applying MECE:</p> <ol style="list-style-type: none"> 1. The small elements of a set cannot overlap. For example, an overlap in the age categorisations of 0-16 and 16-24. 2. The sum of the parts must equal the whole set. For example, a restaurant chain might have eat-in and takeout customers. They may also have customers who order through an online app. These customers must be represented. 3. Small elements must parallel one another. Categories must be directly comparable where possible. For example, a category of customers in an urban metropolitan area would not be parallel to those in a county or state, even if the numbers are similar 4. Apply the rule of three. Sets of three items are memorable and intuitive. Although not a hard and fast rule of MECE, it is easier for people to understand if sets contain four items or fewer. 5. Look out for logical errors and inconsistencies. No tool is infallible. Examine assumptions for oversights and falsehoods.

LO 6.3 Demonstrate an understanding of Gap Analysis

Define gap analysis	Gap analysis is the difference between a 'current' and 'target' state. The purpose of gap analysis is to gain a clear understanding of the differences between the current situation and the perceived future situation.
Distinguishing between Hard and Soft problems	Hard problems arise when the current situation and desired future position is clear. Soft problems arise when the desired future situation is not so clear-cut, and it may be more difficult to work out how to get there.
Define the difference between 'What' and 'How' relative to service design	What: The focus here is on the exploration of the principles and ideas which will underpin the target state service or solution. How: The focus here is on the exploration of the rules or logic which will underpin the target state service or solution.

LO 6.4 Demonstrate an understanding of option appraisal

Option appraisal fundamentals	When assessing an option, it is necessary to consider it relative to the dimensions of cost, time and quality . Other key elements considered include: <ul style="list-style-type: none"> • Strategic alignment • Risk • Impact • Tangible costs and benefits • Intangible costs and benefits • Timescales • Resources • Feasibility
Describe the 3 perspectives of Feasibility Analysis	The 3 perspectives of Feasibility Analysis are: <ul style="list-style-type: none"> • Business feasibility: Considers whether the proposal matches the business objectives, strategy and culture of the organisation • Technical feasibility: Considers whether the proposal meets expectations in terms of performance, availability, reliability, maintainability, and security. Capacity, scalability and interoperability are also considered. • Financial feasibility: Considers whether the proposal is alignment with the financial resources of the organisation. The organisation needs either to have the required funds available, or to be in a position to raise them.

LO 6.5 Explain the key steps in the identification, assessment and management of Risk

Explain the key steps in the identification, assessment and management of Risk	The key steps are: <ul style="list-style-type: none"> • Identify risks, including organisational fit, contract, performance and people. • Assess the significance of risks, including identifying the level of probability and impact. • Identify countermeasures, including avoidance and mitigation actions. Risk transfer and acceptance can also be considered.
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LO 6.6 Describe the rationale for analysing the impact of a proposed solution

Describe the rationale for analysing the impact of a proposed solution	Impact analysis is an approach used by a service design consultant to evaluate the impacts of a proposed solution. These impacts may be negative or positive effects or consequences of the change. The POPIT™ and CPPOLDAT frameworks are used to support impact analysis.
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LO 6.7 Define the key principles of the experimentation approach to testing a solution

Define the key principles of the experimentation approach to testing a solution	The key principles of the experimentation approach are: <ul style="list-style-type: none"> • Test assumptions about the solution. Don't test ideas. • Consider each service prototype to be a test. • Test desirability, not just usability. • Design with data, not opinions. • Design quick and dirty. • Be bold enough to fail.
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LO 6.8 Demonstrate an understanding of solution negotiation

Explain the process of preparing for a negotiation	The key stages of preparing for a negotiation are: <ul style="list-style-type: none"> • Define outcome. • Research background. • Specify objectives. • Assess the power. • Decide strategy. • Plan arguments.
Identify the steps of Principled Negotiation	This approach helps achieve an outcome that is positive for all parties. It was developed at the Harvard Negotiation Project and examines personal perspectives and interests and identifies positive ways forward based on the merits of creative options. This approach comprises four main steps: <ul style="list-style-type: none"> • People: Separate the people from the problem. • Interests: Focus on interests rather than positions. • Options: Consider a variety of options before making decisions. • Criteria: Insist that the decision is based on an objective standard.

LO 6.9 Demonstrate an understanding of Conflict in service design consultancy assignments

Define the term 'conflict'	Conflict is any situation in which there are unresolved differences, and where people appear to have different wants, needs, opinions or beliefs.
Identify the 5 conflict positions	The 5 conflict positions are: <ul style="list-style-type: none"> • Competing: Low Cooperativeness and high assertiveness. • Collaborating: High cooperativeness and high assertiveness • Compromising: Medium cooperativeness and medium assertiveness • Avoiding: Low cooperativeness and low assertiveness • Accommodating: High cooperativeness and low assertiveness
Describe the possible	The possible outcomes from a negotiation are: <ul style="list-style-type: none"> • Win/Win: High courage and high consideration • Lose/Win: Low courage and high consideration

outcomes from a negotiation	<ul style="list-style-type: none"> • Win/Lose: High courage and low consideration • Lose/Lose: Low courage and low consideration • No deal: A decision has been made to end the negotiation and walk away
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Syllabus section 7: Implementing a solution

LO 7.1 Define the roadmap for implementing change

Define the roadmap for implementing change	<p>The roadmap for implementing change is:</p> <ul style="list-style-type: none"> • Assess business readiness. • Design the transition. • Plan the transition. • Deploy the changes. • Sustain the changes.
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LO 7.2 Demonstrate an understanding of using techniques to assess business readiness

Identify the CPPOLDAT elements	<p>The CPPOLDAT elements are:</p> <ul style="list-style-type: none"> • Customer. • Product. • Process. • Organisation. • Location. • Data. • Application. • Technology.
Explain the structure and application of Force Field Analysis	<p>Force field analysis is used to identify the forces that might support or oppose change and the balance between them.</p> <p>The specific obstacles for any change are dependent on several factors, including the type of organisation and the attitudes of staff.</p> <p>Examples of forces for change include:</p> <ul style="list-style-type: none"> • Customers desire for new services. • Improved speed of response. • Increased accessibility. • Lower delivery costs. <p>Examples of forces against change include:</p> <ul style="list-style-type: none"> • Disruption to operations. • Staff fearful of new technology. • Impact on environment. • Investment cost.

LO 7.3 Describe the methods for designing a transition

Explain the use of POPIT™ when designing a transition	No change will succeed unless the transition is designed and planned. The POPIT™ model can be used to provide a holistic view of a change and an understanding of the impact on the processes, the organisation, the people, the information and the technology.
Identify the elements within the McKinsey 7S model	The elements within McKinsey 7S model are: <ul style="list-style-type: none"> • Shared values. • Structure. • Systems. • Style. • Staff. • Skills. • Strategy.
Identify the stages of the SARAH curve	The stages within the SARAH curve are: <ul style="list-style-type: none"> • Shock • Anger • Rejection • Acceptance • Hope

LO 7.4 Define the 4 strategies used to implement change

Define the 4 strategies used to implement change	The 4 implementation strategies are: <ul style="list-style-type: none"> • Direct changeover or big bang: An entire new service is implemented or made available, or there is a direct switch from an old service to a redesigned service. This strategy attracts the highest level of risk, particularly where an old service is to be replaced. • Parallel run: The old and new services are run in parallel for a defined time period. This is a less risky approach than a direct changeover but can be significantly more expensive. • Phased: A new service is implemented in increments. This reduces the risk but can require stakeholders to work with different versions of the same service. • Pilot: A new service is trialled in one area before being deployed more widely. This strategy is also known as ‘proof of concept’, where a proposed new service is deployed, and feedback is gained, before the full implementation takes place.
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LO 7.5 Define the barriers to communication during change

Define the barriers to communication during change	There are 3 aspects of barriers to communication: <ul style="list-style-type: none"> • Barrier 1: When expressing a message care needs to be taken to clarify the message and reduce the potential for misinterpretation. • Barrier 2: When transmitting a message care needs to be taken that environmental ‘noise’ doesn’t disrupt the message. • Barrier 3: When interpreting a message care needs to be taken that all messages received from stakeholders are understood correctly and assumptions aren’t made.
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LO 7.6 Demonstrate an understanding of solution deployment

Identify the stages in Lewin's 3 Step Model	The stages in Lewin's 3 step model are: <ul style="list-style-type: none"> • Unfreeze. • Change. • Refreeze.
Identify the stages in Bridges' Model	The stages in Bridges' model are: <ul style="list-style-type: none"> • Ending, losing, letting go. • The Neutral zone. • The New Beginning.

LO 7.7 Demonstrate an understanding of how change is sustained

Identify Kotter's 8 Steps	Kotter's 8 steps are: <ul style="list-style-type: none"> • Establish a sense of urgency. • Create a guiding coalition. • Develop a vision and strategy. • Communicate the change vision. • Empower broad-based action. • Generate short-term wins. • Consolidate gains and produce more change. • Anchor new approaches in the culture.
Identify key errors and actions	The key errors are: <ul style="list-style-type: none"> • Declaring victory too soon. • Neglecting to anchor changes firmly in the organisational culture. <p>The 3 actions are:</p> <ul style="list-style-type: none"> • Review results. • Make adjustments. • Reinforce.