Service Process Audit -- Interview Instructions

Before beginning, study these instructions and review the Service Process Audit chapter from *Essentials of Service Design and Innovation*. Complete the study parameters below. For each interview, write the interviewee name, the date, and the interviewee's role (customer, provider's contact employee, provider's manager, or other) on the top of the interview form, including how many years they have been in that role. In the center column of the interview form, write the name of the provider, the name of the process, and the first step of the process.
Interviews involving a simple process might typically take 15 to 20 minutes. The following are steps to completing an SPA interview:

Part 1. Have the interviewee tell the steps of the process. Tell them the first and last step. Possible dialog might be: "I am studying the process that a (what customer is called) goes through to (name of the process). Please describe the steps you would typically go through to (name of the process) with (name of the provider), beginning with the step '(first step)' and ending with the step '(last step).'"

As the interviewee speaks, write the steps on the form. Begin using every other box, allowing inserted steps as necessary. Use more than one page if necessary. After they have reached the last step, review the steps with them so that they can make corrections. As you review the steps, silently mark whether the step is performed by the provider employee (check ○Prov), the customer (○Cust), or interactively (Surrogate Interaction or Direct Interaction). Also note if the step also involves a wait, a decision, or some other entity.

Part 2. For each step, identify the perceived value of the step to **customers**. Show them the card and review the four options. Then, for each of the steps (except perhaps the first and last steps) record which card option the subject indicates.

Part 3. For each of the four problem categories (shown on the card), identify which steps have the problem, recording brief descriptions. First, show the card and describe each of the four categories. Then, identify any steps fitting each problem category, one problem category at a time (i.e., identify any inconvenient steps first, then any confusing steps, then any difficult steps, then any steps that are likely to fail.)

Study parameters

Industry:_____ (e.g. the Airline industry, Healthcare, Education)

Provider:_____ (e.g. Southwest Airlines, Central Utah Clinic)

Customer is called:_____ (e.g. passenger, patient, or just "customer")

Name of process being studied:_____ (e.g. book an airline ticket)

First step of process:_____ (e.g. need an airline reservation)

Last step of process: _____ (e.g. have an airline reservation)

Service Process Interview. Interviewee: _____ Date: _____ Role/years: _____

Part 2. How valuable is each step?				**Part 1: What are the steps of the process?** The provider: _____ The process: _____ List the steps below…	**Part 3. Which steps have these problems?**			
very valuable (☺ ☺)	some-what valuable (☺)	necessary but not valuable	not neces-sary nor valuable (☹)		3a. **incon-venient** (How so?)	3b. **confusing** (What is confusing?)	3c. **difficult** (What is difficult?)	3d. **likely to fail** (How so?)
○	○	○	○	1. ○Prov, ○SI, ○DI, ○SI, ○Cust ❑wait ❑dec ❑other:	❑	❑	❑	❑
○	○	○	○	2. ○Prov, ○SI, ○DI, ○SI, ○Cust ❑wait ❑dec ❑other:	❑	❑	❑	❑
○	○	○	○	3. ○Prov, ○SI, ○DI, ○SI, ○Cust ❑wait ❑dec ❑other:	❑	❑	❑	❑
○	○	○	○	4. ○Prov, ○SI, ○DI, ○SI, ○Cust ❑wait ❑dec ❑other:	❑	❑	❑	❑
○	○	○	○	5. ○Prov, ○SI, ○DI, ○SI, ○Cust ❑wait ❑dec ❑other:	❑	❑	❑	❑
○	○	○	○	6. ○Prov, ○SI, ○DI, ○SI, ○Cust ❑wait ❑dec ❑other:	❑	❑	❑	❑
○	○	○	○	7. ○Prov, ○SI, ○DI, ○SI, ○Cust ❑wait ❑dec ❑other:	❑	❑	❑	❑

Service Process Interview. Interviewee: _____　　Date: _____　　Role/years: _____

Part 2. How valuable is each step?				Part 1: What are the steps of the process? The provider: The process: List the steps below…	Part 3. Which steps have these problems?			
very valuable (☺☺)	some-what valuable (☺)	necessary but not valuable	not neces-sary nor valuable (☹)		3a. **incon-venient** (How so?)	3b. **confusing** (What is confusing?)	3c. **difficult** (What is difficult?)	3d. **likely to fail** (How so?)
○	○	○	○	8. ○Prov, ○SI, ○DI, ○SI, ○Cust ❑wait ❑dec ❑other:	❑	❑	❑	❑
○	○	○	○	9. ○Prov, ○SI, ○DI, ○SI, ○Cust ❑wait ❑dec ❑other:	❑	❑	❑	❑
○	○	○	○	10. ○Prov, ○SI, ○DI, ○SI, ○Cust ❑wait ❑dec ❑other:	❑	❑	❑	❑
○	○	○	○	11. ○Prov, ○SI, ○DI, ○SI, ○Cust ❑wait ❑dec ❑other:	❑	❑	❑	❑
○	○	○	○	12. ○Prov, ○SI, ○DI, ○SI, ○Cust ❑wait ❑dec ❑other:	❑	❑	❑	❑
○	○	○	○	13. ○Prov, ○SI, ○DI, ○SI, ○Cust ❑wait ❑dec ❑other:	❑	❑	❑	❑
○	○	○	○	14. ○Prov, ○SI, ○DI, ○SI, ○Cust ❑wait ❑dec ❑other:	❑	❑	❑	❑

Service Process Interview. Interviewee: Date: Role/years:

Part 2. How valuable is each step?				Part 1: What are the steps of the process? The provider: The process: List the steps below…	Part 3. Which steps have these problems?			
very valuable (☺ ☺)	some-what valuable (☺)	necessary but not valuable	not neces-sary nor valuable (☹)		3a. **incon-venient** (How so?)	3b. **confusing** (What is confusing?)	3c. **difficult** (What is difficult?)	3d. **likely to fail** (How so?)
O	O	O	O	15. OProv, OSI, ODI, OSI, OCust ❑wait ❑dec ❑other:	❑	❑	❑	❑
O	O	O	O	16. OProv, OSI, ODI, OSI, OCust ❑wait ❑dec ❑other:	❑	❑	❑	❑
O	O	O	O	17. OProv, OSI, ODI, OSI, OCust ❑wait ❑dec ❑other:	❑	❑	❑	❑
O	O	O	O	18. OProv, OSI, ODI, OSI, OCust ❑wait ❑dec ❑other:	❑	❑	❑	❑
O	O	O	O	19. OProv, OSI, ODI, OSI, OCust ❑wait ❑dec ❑other:	❑	❑	❑	❑
O	O	O	O	20. OProv, OSI, ODI, OSI, OCust ❑wait ❑dec ❑other:	❑	❑	❑	❑
O	O	O	O	21. OProv, OSI, ODI, OSI, OCust ❑wait ❑dec ❑other:	❑	❑	❑	❑

Part 2.

How valuable is each step **to customers**, from these options...

very valuable (☺ ☺)	Makes customers happy. Really meets customers' needs.
somewhat valuable (☺)	Somewhat meets customers' needs. Makes customers a little bit happy.
necessary but not valuable	We must have the step, but it does not make customers happy or sad.
not necessary nor valuable (☹)	Not clear why we have the step. Would be better if we did not have the step.

3a. To customers, which steps are

Inconvenient	The step requires unwanted extra effort.

For each inconvenient step, tell what is inconvenient about it.

3b. Which steps are

Confusing	The step is unclear to customers (and perhaps unclear to employees).

For each confusing step, tell what is confusing about it.

3c. To customers, which steps are

Difficult	The step requires excessive effort, knowledge, or ability to perform.

For each difficult step, tell what is difficult about it.

3d. Which steps are

Likely to fail	The step has an uncertain outcome and a reasonable likelihood of failure.

For each likely-to-fail step, tell how it is likely to fail.