

REGION OF WATERLOO

MILESTONE 4

PROJECT BRIEF

The Region of Waterloo needs a practical way to turn complex digital strategies into high-quality public services. To solve this, we developed a web-based Service Design Playbook, a living digital tool that replaces static PDFs and fragmented workflows. By providing staff with clear checklists, templates, and shared standards, we are streamlining internal processes to create a more consistent, accessible, and resident-centered experience across all regional departments.

The Problem: Current strategy documents are too technical and staff workflows are scattered across too many systems (Excel, Teams, SharePoint).

The Solution: A searchable, web-based platform integrated directly into the staff intranet.

User Feedback: Staff requested "less reading, more doing", focusing on templates and step-by-step guides.

Key Features: Secure login, advanced "Google-style" search, and a simple, uncluttered layout.

Goal: Move residents from phone calls to efficient digital self-service.



RESEARCH MEHTHOD

Method 1: Staff Survey

Participants: 9 regional employees across various departments.

Focus: Identifying workflow bottlenecks and current tool usage (Excel, Teams, SharePoint).

Key Insight: Staff prioritize functional tools (checklists/templates) over long-form reading material.

Method 2: Client Interview

Format: 20-minute stakeholder meeting via Zoom.

Focus: Defining success metrics and organizational culture requirements.

Key Insight: The playbook must be unique to Waterloo and accessible to both IT experts and front-facing staff.

Method 3: Comparative Analysis

Scope: Audited 6 major playbooks (Toronto, UK, Ontario, BC, US, and Vancouver).

Focus: Evaluating web-based vs. PDF structures and navigation standards.

Key Insight: A web-based "living tool" is superior for long-term usability and scannability.

RESEARCH QUESTION

How might we construct a service design playbook that is clear, easy-to-use, and helps employees understand and integrate digital tools, collaborate with cross-functional teams, and utilize relevant resources while performing digital services?

IDEATION PHASE

After completing our research, we moved into the ideation phase to explore potential directions for the service playbook.

Research synthesis

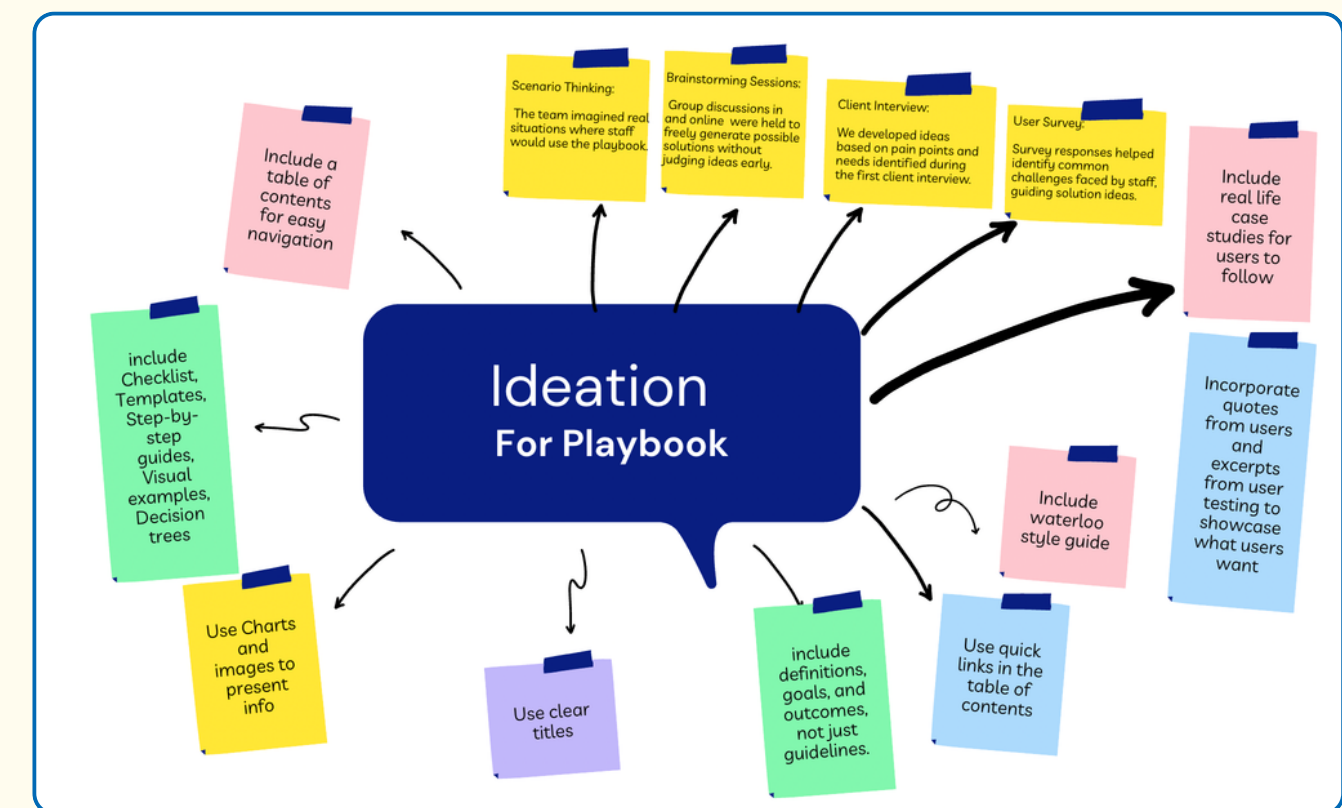
- Reviewed insights from surveys, interviews, and playbook comparisons
- Identified key user needs and challenges

Idea generation

- Brainstormed potential structures for the playbook
- Discussed useful tools and features

Design direction

- Focused on clarity and usability
- Prioritized practical tools for employees



LOW-FIDELITY PROTOTYPE

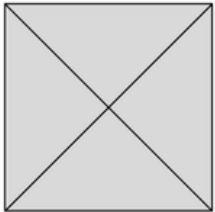


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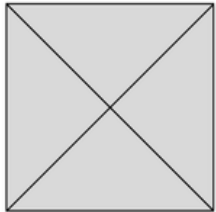
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Modules

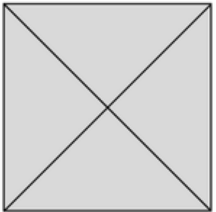
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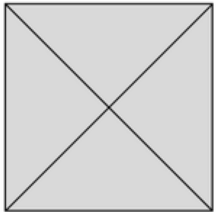
Digital Services Playbook
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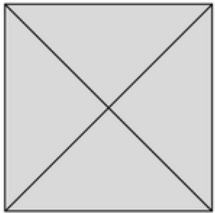
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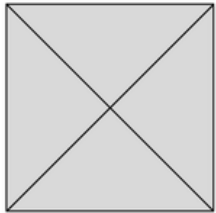
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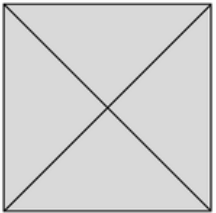
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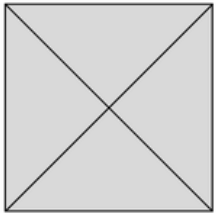
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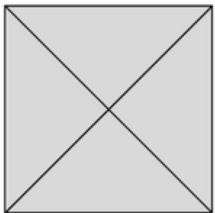
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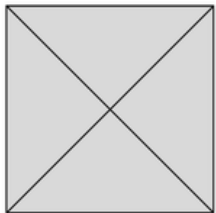
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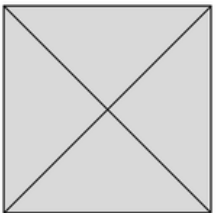
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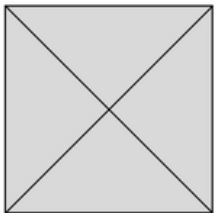
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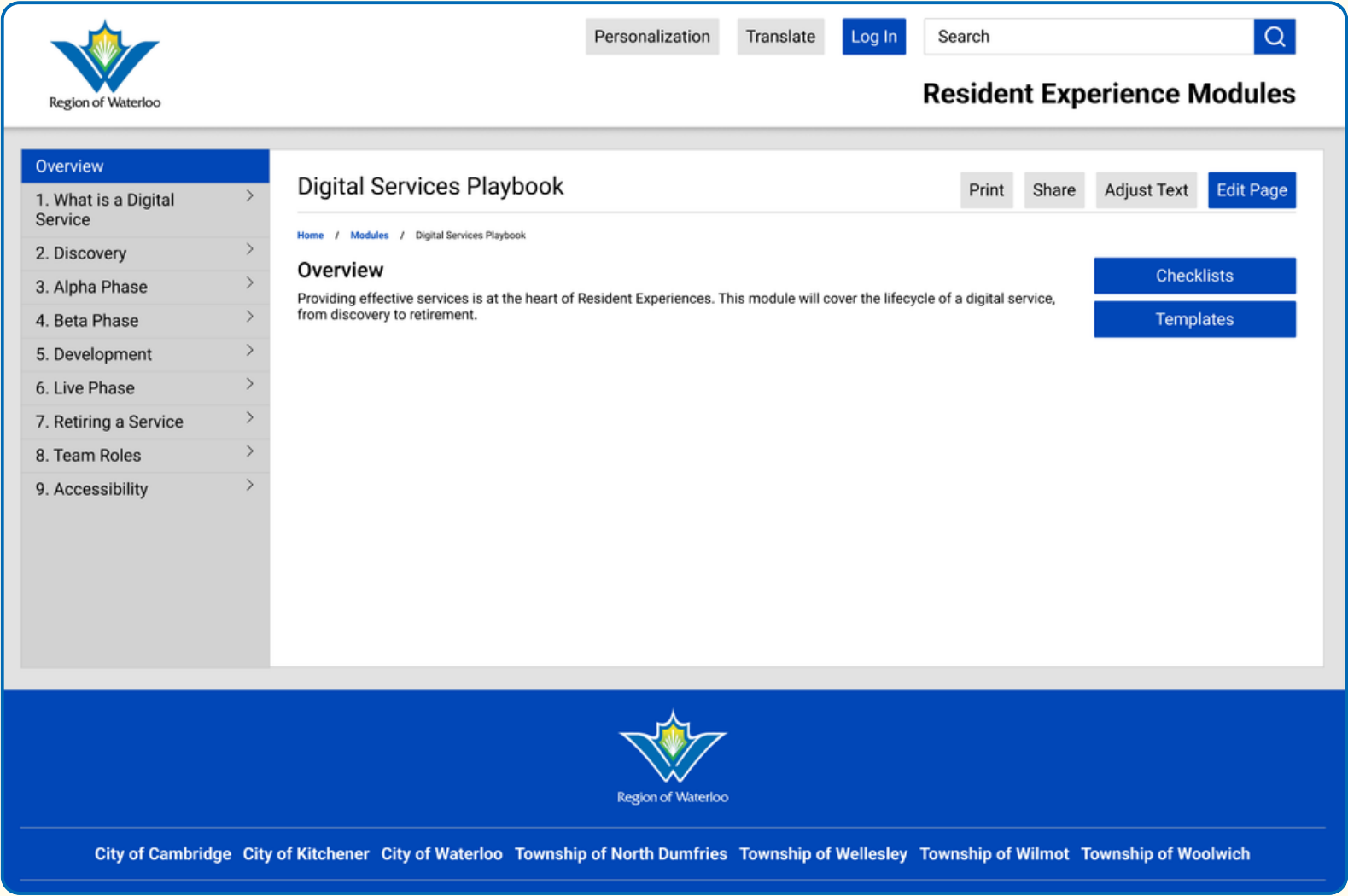
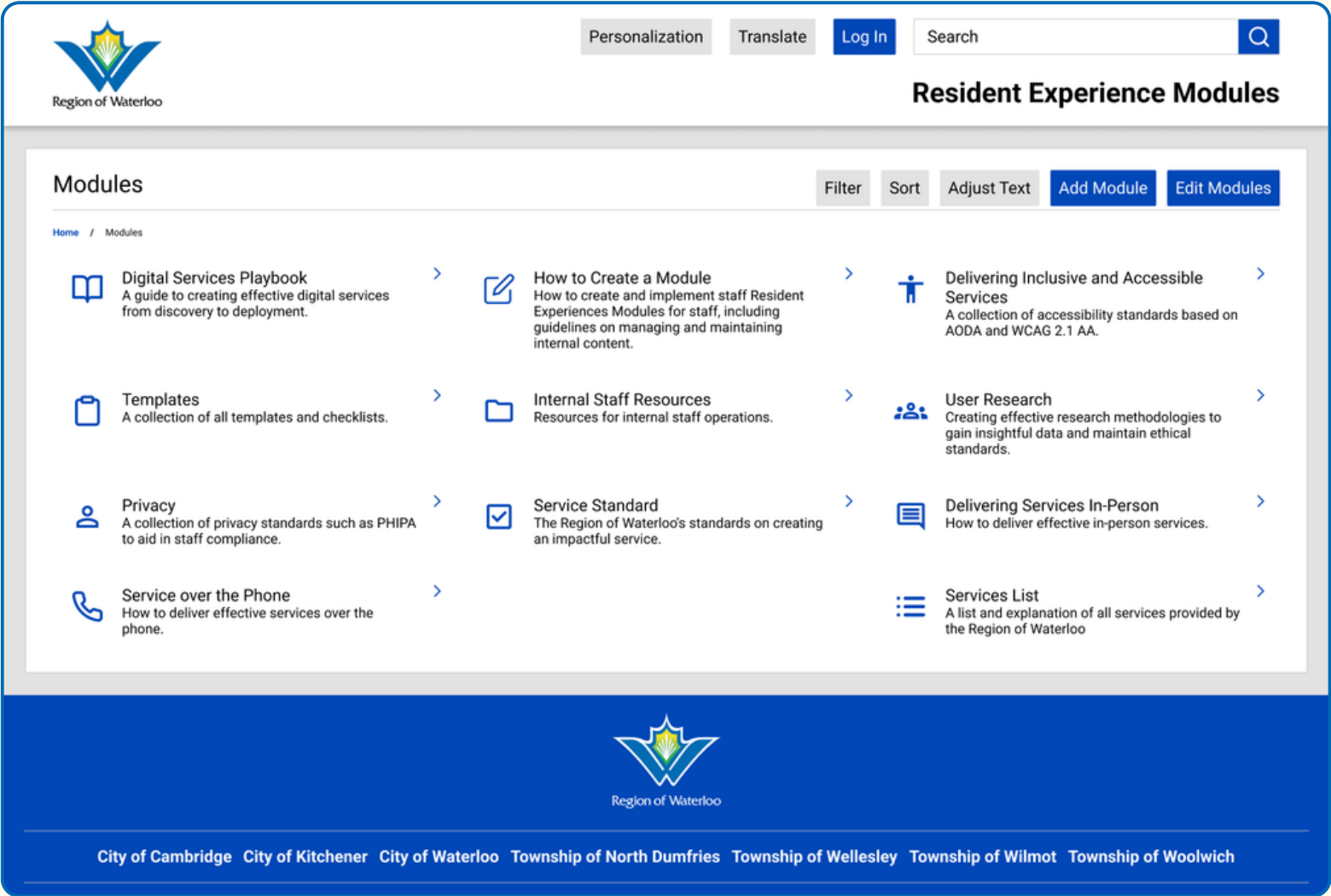


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MID-FIDELITY PROTOTYPE





PersonalizationTranslateLog InSearch

Resident Experience Modules

Results for “Consent Form”

FilterSortAdjust Text

Links (4) / Documents (1) / Modules (3)

Results

Consent Forms

How to write a comprehensive consent form within ethics guidelines.

Participant Consent

Why consent is important and when do you need it.

Research Ethics

description

Participant Privacy

description

Documents

 Research Consent Form Template [.docx]

Related Modules

 Templates

A collection of all templates and checklists.

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 User Research

Creating effective research methodologies to gain insightful data and maintain ethical standards.

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 Privacy

A collection of privacy standards such as PHIPA to aid in staff compliance.

>



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PersonalizationTranslateLog InSearch

Resident Experience Modules

Overview

1. Interdepartmental Communication

1.1 Real-World Example

Internal Staff Resources

PrintShareAdjust TextEdit Page

Home / Modules / Internal Staff Resources

Checklists

Templates

Overview

This module features a collection of internal staff resources for day-to-day operations. It is meant to educate staff on their roles, responsibilities and rights as well as creating a guideline of standards for professional etiquette expected from a government employee.

1. Interdepartmental Communication

Strong communication between departments helps keep teams aligned, reduces duplicated work, and supports consistent service delivery. In a regional setting, this coordination directly impacts how effectively services are delivered to residents and stakeholders.

Communication should be clear, consistent, and timely, with Messages working best when they are concise and focused on next steps. Using shared tools and channels helps reduce confusion, and having clear points of contact in each department makes sure requests reach the right people quickly. Requests should be brief and easily scannable, outline what is needed, why it matters, and when it is required, so teams can respond efficiently. Keeping information documented and accessible in shared spaces also helps prevent knowledge from being siloed.

Regular check-ins between departments support interdepartmental coordination, whether through recurring meetings or project discussions. Informal interactions are just as important. Simple opportunities like team lunches or casual meetups help build relationships and make day-to-day collaboration easier.

Good interdepartmental communication relies on both clear processes and a culture where teams are open, responsive, and willing to work together.

1.1 Real-World Example: Interdepartmental Lunch Form

- The organizer provides their name, department, and contact information, along with the departments involved. Including a general purpose, such as meeting for lunch, or to discuss a project.
- The form should be clear about the proposed date and time, any alternatives, and whether the lunch is in person or virtual, along with the location or meeting link. An estimate and list of participants would be beneficial.
- Any costs should be noted, including whether it is required to bring your own lunch or if it is department funded. For the purposes of discussion a simple agenda can help structure the conversation while keeping things on track.
- Accessibility and dietary needs should be considered in advance. After the meeting, any key takeaways can be shared and follow up responsibilities noted to keep the process useful and easy to repeat.

Some questions to consider asking on the form:

What is your name?
What department are you part of?
What is your contact information?
Which departments will be participating?
What is the purpose of this lunch?
What is the proposed date and time?
Are there any alternative dates or times?
Will the lunch be in person or virtual?
Where will it take place or what is the meeting link?
Who will be attending?
What is the estimated number of participants?
How will the lunch be handled in terms of cost?
Is this a bring your own lunch or department funded?
What is the agenda for the lunch?
Are there any accessibility needs to consider?
Are there any dietary requirements?
Are there any follow up actions?
Who is responsible for follow up?



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FINAL PROTOTYPE

[Figma Link](#)

THANK YOU

Q&A