

Service Design

and how to bring offline users online and improve the omni-channel experience



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"THERE IS ONLY ONE BOSS. THE CUSTOMER. AND HE CAN FIRE EVERYBODY IN THE COMPANY FROM THE CHAIRMAN ON DOWN, SIMPLY BY SPENDING HIS MONEY SOMEWHERE ELSE."

SAMUEL MOORE WALTON (MARCH 29, 1918 – APRIL 5, 1992) FOUNDER OF WALMART Wise words from a wise man. It goes without saying that without customers no iGaming company could survive. It makes perfect sense therefore to ensure your customers are delighted with your brand and the products they are using. Irrespective of whether your business is a physical store, as Walmart was when it started, or is a complex multiple channel business so typical of an iGaming one - Samuel's wise words ring true.

This white paper serves to highlight some of the challenges, and most importantly, the opportunities that exist in adopting a Service Design approach. It will start with an intro to the iGaming industry, how the process of digital transformation has shifted the landscape and why, in an "omni-channel world" Samuel's words are even more important.

Grab a coffee, put your feet up and enjoy the white paper. It's about three and a half thousand words, which should take you less than 20 minutes to read.

If you have any questions or would like to find out more about how our team can help you keep your customers excited about your brand or products, then drop us a line at: info@symphony-solutions.eu

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EDUARDO A DOS REMEDIOS

VP Symphony iGaming Services

iGaming Industry at a Glance

\$449.3 bn

share of the global iGaming market in 2018



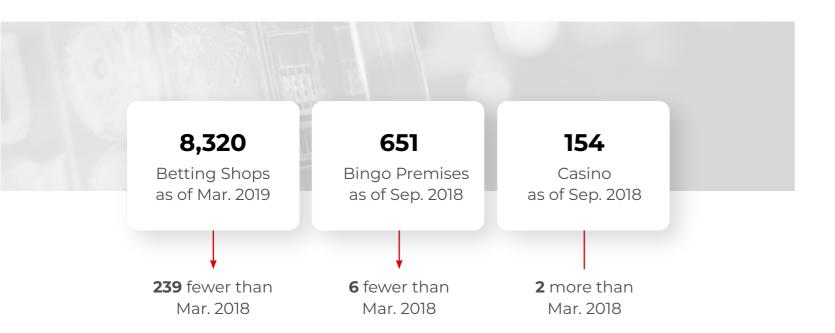
Market share of the online gambling in the UK

£14.4 bn (\$16.99 bn) Total gross gambling yield of iGaming industry in the UK

\$565.4 bn – the expected growth of the market by 2024

\$94 bn – anticipated value of online iGaming market by 2024

\$46 bn - current size of the online sector



179,556 **Gaming Machines**

0.3%

Decrease from year ending March 2018



0.5%

Increase from year ending March 2018

£2.8 billion

GGY from Gaming Machines

DIGITAL TRANSFORMATION -YOUR SAFE BET

THE GLOBAL BUSINESS **ENVIRONMENT IS CHANGING RAPIDLY** TODAY.

Up and coming emerging technologies pop up quicker than the latest iPhones, the race to deliver new products and services faster and most importantly with a superior level of customer service. leaves businesses no choice but to embrace the digital era we live in and to transform quickly. This statement couldn't be any more true in 2020. The global Covid-19 pandemic is changing our lives and is making us consider how to adapt to the new world we live in. The situation that is unfolding at the moment accelerates the need for change and greater numbers of new users are arriving online.

Fresh young iGaming startups have no 'legacy baggage' and can hit the ground running, diving straight into a digitally transformed model. The 'older' iGaming companies do not have this luxury and are in danger of falling behind their younger competitors. It is key that they accept the rules of the digital era.

One possible effect of Covid-19 is that there will be new online users that will have signed up, users who are very new to the world of on-line betting, having previously been staunch offline retail store customers. These new customers may require extra help and attention in finding their way around the websites and apps, and coming up with the best ways to make them comfortable online is actually what we are going to talk about in this white paper.

1.1

THE STATE OF THE IGAMING **INDUSTRY**

Gambling Global Market Report 2019 estimated that the size of the global iGaming market was expected to grow to nearly \$565.4 billion by 2022. While Statista numbers suggested that the share of online gambling would reach \$94 billion mark by 2024. This was all until February 2020 when the world started shutting down gradually and by spring it became apparent that the usual life, we were accustomed to was put on hold. It's hard to give the exact estimate of the global gaming market loss in 2020 but we can be sure that the industry won't be left unimpacted.

When it comes to the subcategories, the most popular is sports betting. Here Europe is the biggest market in the world and UK is still the industry major player. In the UK iGaming yielded £14.4 billion (nearly \$17 billion) in 2019, with 37% market share for the remote sector (I.e. online betting,

bingo and casino games).

The future growth of the sports betting in the upcoming years greatly depends on how the things will unfold in some parts of the world. For instance, in the US the sector could be worth of over \$6 billion by 2023 if the 32 States joined the market. Similarly, Asia-Pacific is another promising market that could expand if the regulation and policy allows. Along with the promising data for sports betting, we see another trend within the industry - the decline of numbers of offline gambling premises. In the UK alone the number of offline betting shops and bingo premises are going down.



1.2

DRIVING FORCES OF DIGITAL TRANSFORMATION IN IGAMING

The ultimate forces that drive digital transformation in iGaming are, of course, clients, their changing needs, new technologies that might facilitate their needs and offer a better

level of service or a completely new experience, and finally the race with competitors to satisfy their customers first

What drives digital transformation in iGaming?

- Customer expectations
- Innovation
- Emerging technologies
- Expectations of better customer experience

It comes as a no surprise that the central element in all of these digital efforts are mobile devices. It is the primary device in everyone's daily life today when it comes to entertainment, communication, social media, education or shopping online, which consequently makes it the primary device for iGaming industry as well.

Unlike offline premises that are available a limited amount of time, going online for iGaming means 24/7 access sports bets, games, online casinos.

'The Anytime anywhere' nature of accessibility that comes with mobile devices makes it a prime channel that iGaming operators either are or should be prioritizing

AND HOW DO YOU ACHIEVE THIS **DIGITALIZATION AND AT** THE SAME TIME ALIGN The number one mission of digital transformation in iGaming is getting IT WITH YOUR OTHER the customer-better experience on the next level by taking into account **ACTIVITIES** not only the latest tech but also bearing in mind that the client's journey involves multiple touchpoints, both digital and with the brick-andmortar offline locations. This hits especially close to home for the sports betting segment with its myriad opportunities to engage customers in betting both offline in shops and online via mobile devices. The challenge here is to make this experience as smooth and seamless as possible and offer the same level of customer service and user experience whichever environment a client chooses to engage in. An effective way to achieve it is by offering omnichannel experience. It covers both digital and non-digital sides and offers consistent user flows both cross-platform and offline.

1.3

OMNICHANNEL IN IGAMING

Omnichannel means providing the same level of experience and content across all channels the business interacts with its customers.

But being omnichannel doesn't necessarily mean that all these channels have to have the same look or feel. The important thing is that they offer the same level of service, whether we are talking about offline or online outlets.

A very common mistake legacy iGaming providers make when trying to introduce omnichannel, is thinking simply updating and modernizing their online solutions will make them an omnichannel company.

The right way of taking the omnichannel approach is first and foremost putting clients in the center of the journey and allowing them to choose the channel where they want to place the bet, whilst the provider's role is to make sure that whichever channel they (clients) choose, offers the best level of user experience. A way to achieve this superior and logical customer experience is with service design, which we will talk about in the next chapter.



WHY EXPERIENCE DESIGN IS NOT ENOUGH FOR IGAMING

In a digital world, UX is king. We know that first and foremost the digital product you are offering to your client should have exceptional user experience. But no matter how intuitive your design is or how fast your app or a website runs, in iGaming it's not enough if, for instance, clients are having trouble finding that app in the App Store, setting up and account or even getting the basic information from customer service.

As an operator and service provider you might think you are offering your customers superior digital experience but all your good intentions might be down the drain if unaccompanied by the same level of offline services.

To tackle the design holistically, which includes both online and offline touchpoints, experience design is not enough. We believe service design is a better fit to take on this task.

2.1

SERVICE DESIGN 101

AN ACTIVITY OF PLANNING AND ORGANIZING A BUSINESS'S RESOURCES (PEOPLE, PROPS, AND PROCESSES) IN ORDER TO DIRECTLY IMPROVE THE EMPLOYEE'S EXPERIENCE, AND INDIRECTLY, THE CUSTOMER'S EXPERIENCE.

Service design is interpreted in different ways – an activity, a toolset, a mindset, an approach, a method, whichever name you choose the goal is still the same – designing services that are equally beneficial to the customer and the business. It tries to find that sweet spot between what people need and what is technically feasible for the business strategy.

To achieve this, service design considers the product or service that you offer to your clients just the tip of the iceberg, while stating that there's still plenty to discover beneath the visible surface. For instance, how both digital and non-digital parts impact the product, how it integrates with other products, or overall user expectations.

NIELSEN NORMAN GROUP



2.2

UX VS SD AND WHY SERVICE DESIGN IS A BETTER FIT FOR OMNICHANNEL IGAMING

The significant difference between service design and say experience design or customer experience, and what makes it a better approach for iGaming industry is that it goes deeper than the previous two approaches.

While UX is about everything physical that the customer interacts with (be it an app, a website, or a betting shop) and CX also includes some elements that are not visible to users (I.e. systems, policies, backend supporting staff), service design is interested in how this end experience is created.

System Design **Experience Perception** SD considers all channels and touch **CX** focuses on orchestrating all touch points, but also from an organisational points through all channels perspective Service Customer Experience Design (SD) (CX) User Experience (UX) **Product Interaction UX** focuses on the design of a single customer touch point

RATHER THAN CREATING A SINGLE TOUCHPOINT (AS UX DOES), ITS GOAL IS TO CREATE A CONSISTENT AND SEAMLESS EXPERIENCE THROUGH VARIOUS TOUCHPOINTS AS IT UNDERSTANDS THAT USERS DON'T INTERACT WITH THESE VARIOUS TOUCHPOINTS IN SILOS.



Thus, service design aligns them together to create that end to end experience companies strive to provide. "Something which comes in handy for any iGaming company that wants to introduce omnichannel experience.

In the next chapter we will talk about the offline and online struggles

iGaming industry has to deal with and then try and find a solution for some of them. For this purpose, Symphony Solutions Design Office team has conducted a field research in a number of London betting shops, gathered the data and designed a solution using service design. The results of their work will be presented in the last chapter, the case study.

WHAT'S HOLDING iGAMING BACK? Online and offline roadblocks to creating an omnichannel experience

Digital transformation doesn't happen overnight. And for a well-established industry like iGaming this statement is no exception.

ONE OF THE MAIN
OBSTACLES THE
INDUSTRY IS
EXPERIENCING IS THE
MINDSET. FOR A LOT OF
LEGACY PROVIDERS,
THE LOGIC IS PRETTY
SIMPLE – WHY FIX
SOMETHING THAT ISN'T
BROKEN? YET.

While the business might be going steady for a particular user sector, typically older generation non-digital users that are used to spending time in betting shops and are not exactly what can be called tech-savvy users, it can't ignore what's going on around them. The number of brick-and-mortar betting shops is decreasing with each year, the competition in the form of already online providers is stepping on their toes, and if this wasn't bad enough, they might also be experiencing some internal challenges.

3.1

THE MAIN DIGITAL CHALLENGES FOR LEGACY PROVIDERS

Being Forced to Go Digital

One of the worst nightmares for any operator is to find themselves forced to move online. This is often the case for those that because of a certain regulatory framework were living a comfortable monopolistic life in a certain retail sector and then suddenly find themselves in a newly regulated online environment up against a stiff competition of seasoned online providers.

And what's even worse, in a desperate attempt to stay relevant, some companies often choose to copy the solutions or designs of their competitors without trying to understand what's appropriate for their circumstances or what their users need.

SO INSTEAD OF WILLINGLY DRIVING THE CHANGE WITHIN THEIR BUSINESS THE OPERATORS ARE FORCED TO PLAY CATCH-UP AS THEY ARE FACED WITH A PROSPECT THAT THEIR CUSTOMERS MIGHT BE CHOOSING A DIFFERENT BRAND.

Not Taking Full Advantage of Their Assets

Another issue with legacy providers is that they tend to take the relationship they have with their customers for granted and thus not fully realize them. For instance, if a client enjoys a certain type of game (say Keno or roulette) in the retail premises, the provider will see little logic in putting time and effort into persuading them to play online. But what they fail to see is that in many cases introducing online services can make their customer's life and experience with the brand more pleasant.

SAY YOUR CLIENT LIKES TO BOOK A TABLE FOR **DINNER AT THE CASINO** WHILE PLAYING THERE. WHY NOT GIVE HIM THE OPTION OF DOING IT WITH YOUR MOBILE APP?

Central to many of these issues is the player account management system and how sophisticated it can be to ensure frictionless commerce (as well as expected security and fraud protection functionality) across all channels and devices but also marry up with CRM applications to enable the customer to enjoy all the benefits the brand is uniquely placed to provide through their omnichannel approach.

Problems Within

Another issue is that without realizing it, many providers have digital transformation blockers within their organization. The retail staff often are not instructed enough to help the clients in case any issue pops up. The challenge of becoming an online user doubles as there might not be clear instructions how to become one.

The UI of in-store terminals leaves much to be desired: it's not intuitive. too complicated especially for senior users and has a lot of usability issues.

Another problem that is often overlooked is that the staff itself are not motivated to promote their brand's online offering as they might view it as a threat and something that will substitute their retail business. This might differ from company to company but it stems from the same issue that businesses are set up in a silo-ed way with separate cost centres for each channel. Clearly, the operator

wants to get as big a share of their customers' overall spend regardless of which channel they transact through and the reality is, the trend to move online is unstoppable.

If operators don't promote their own digital channels or omnichannel offering in-shop then their customers will bet online with a competitor.

Wise operators adopt systems that ensure that retail channels or individual members of staff are either incentivised or share in the benefits of the online or omni revenues that accrue.

3.2

ON THE IMPORTANCE OF CREATING **OMNICHANNEL EXPERIENCE**

The acquisition of users into the digital channel shouldn't be deemed as a separate venture. Which, in fact, it's not. Any new channel you introduce has to be consistent with what you are already offering and make it clear that it's a part of the brand.

ONE WAY OF CREATING THIS SEAMLESS **EXPERIENCE AND BUILDING A LOYAL CLIENT BASE IS TO PROVIDE THEM WITH CONSISTENT CUSTOMER JOURNEYS AND A** STRONG TECHNOLOGY **BASE OFFERED BY** AN OMNICHANNEL **EXPERIENCE. IN IGAMING OMNICHANNEL COVERS DIGITAL AS WELL AS NON-DIGITAL EXPERIENCES**

A common mistake amongst operators is to take a basic "off the shelf" online onboarding template. even one they might regard as best practise design, and adopt a "this will do" approach. A more enlightened approach would be to accept that whatever you design may not be perfect and therefore it is key to have the ability to scrutinise customer journeys and identify where customers are dropping off on the onboarding journey and have the architecture flexible enough to make improvements quickly.

Moreover, being able to identify which people are dropping off in real-time and having the ability to contact them before they leave for good will be a competitive asset. If you haven't quite cracked being able to provide 100% of your visitors with a fully intuitive UX then you need to ask what are the fallback options for the customer

either through on page help or help chat or call centre help. Again, the relevance, contextualisation and usability of those fall-back options must be rigorously thought out as they in themselves may lead to further customer dissatisfaction or rejection. The operator must ask itself what it is prepared to invest to get this part of the equation as right as possible versus the opportunity cost lost in not doing it.

Operators should also be acutely

aware that the onboarding process often represents either the first experience the customer has with the brand or, if already a customer of the brand, the first experience of that channel and therefore the process should reflect its brand values - using familiar tone of voice and look and feel.

ONE OF THE FIRST THINGS YOU NEED TO BE ASKING YOURSELF ON YOUR DIGITAL TRANSFORMATION JOURNEY IS HOW TO MAKE THE FIRST INTERACTION OF A CUSTOMER WITH YOUR PRODUCT A SUCCESS? WHAT CAN YOU DO TO MAKE THE ONLINE ONBOARDING EXPERIENCE LESS STRESSFUL? OR IS THERE ANYTHING FOR THE ALREADY DIGITAL USERS TO MAKE THEIR EXPERIENCE BETTER?

> These were the sort of questions Symphony Solutions' Design Office asked themselves as they set out on a journey to improve the online onboarding process by implementing service design principles but at the same time using already available resources.

60% LESS STEPS, IMPROVES CONVERSION RATE



Digital transformation in the gambling and betting sector is as much a pressing topic as for any well-established industry that has to adapt to the digital world and new requirements of its users. With a consistent decline in the number of bricks-and-mortar betting shops each year and growing statistics of the time we spend on our mobile devices, digitalization is something that cannot be ignored by such a highly-competitive industry. For these reasons, iGaming providers are putting more and more focus and effort into getting their users online and at the same time keep it in line

with their offline offerings to create a seamless omnichannel experience for their users. A task that is quite challenging from several perspectives.

One of the main strategic goals for any iGaming provider today is to increase the percentage of online users and for obvious reasons. The time punters spend in on-premises betting shops is limited to its working hours, while online products have 24/7 access, which means that users can bet anywhere and anytime. This is especially beneficial for sports betting, with sports events happening globally around the clock.

ISSUE

With the increase in the number of online users, the services iGaming companies provide, especially when it comes to the process of onboarding, leave a lot of room for improvement. Just to name a few: there are no clear instructions in betting shops on how to get the app, searching for it in App Store is quite challenging and confusing. And once users download the app, they are in for a lengthy process of registering which is extra daunting if a user doesn't already have and needs to get a special loyalty card.

Betting providers are introducing these loyalty cards to increase digital users. This card is a first step to becoming an online user and contains all the needed personal information about a user. The card holder also receives offers with additional betting features such as 'Best Odds'. The steps are as follows: a person goes to a retail shop, provides some personal data (in a handwritten form) and after a lengthy process which is confusing and involves a lot of unnecessary steps, numerous push notifications and confirmation emails, and finally one can make a bet online. Researching and applying service

design to cut this drawn-out onboarding process and make the whole experience for the end-user smoother and at the same time in line with all the other service offerings was the task Symphony Solutions' Design Office took on. After initial interviews and research, the team narrowed down the challenges to the following:

Increasing the number of online users

Removing obstacles and decreasing time taken in getting the loyalty card

Increasing the visibility of the loyalty card and raising the level of awareness

As IS 36 steps TO BE 13 steps Receive Customer cand, promo and QR code and open web site Scan Customer card number Scan Scan Customer card promo and QR code and open web site Auto populate auth code from SMS Create pin code for "Customer card activated" See proposition to upgrade account to multichannel account to multich

SOLUTION

According to the roadmap created by the design team, the initial user journey from having the intention to place a bet to creating the account required 36 steps

From the user perspective, some of these actions, like filling in your personal information with pen and paper and then helping the assistant to decipher the handwriting, or confusing steps in the apps itself (i.e. the problem with user name or a password) provide for high levels of frustration and would significantly hamper the conversion process.

Using service design, the design team analyzed the main goals of users (I.e.

'Best Odds') and the business (getting users online) and satisfied both needs instantly by moving them to the beginning of the user journey. The first dramatic cut down suggested involves removing the physical card by being one step ahead and already giving the card to users in QR code form. The other improvements of the user journey include letting users fill in their personal data already in the app, auto-population of some fields, removing shop assistants from the journey.

As a result, the final solution presented by the design team strips down the onboarding process to just 13 steps.



RESULTS

Cut down the onboarding user journey by 60 %;

Removed the initial step of receiving the physical card by offering it to users in advance in QR code form;

Automated the flow and letting the system predict all the steps for users;

Removed all assistants from the user journey to create a digital step-by-step experience;

Discarded all the unnecessary steps (e.g. filling the personal data manually);

TO SUM UP

Digital transformation in the iGaming is happening as in any other industry. And it's up to the operators to act fast and leverage it to the full advantage or eventually be forced to move online. The important thing is to realize that creating a new online offering has to be in line with services your brand is already providing to the clients.

The way to create this wholesome omnichannel experience both online and offline is through service design, an approach that works not with designing separate user touchpoints but takes into account all of them and how they interact to build a consistent journey for the end users.

SOURCES

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ABOUT SYMPHONY SOLUTIONS

Symphony Solutions is your premier provider of custom iGaming and Agile transformation solutions. It is a digital company headquartered in the Netherlands with delivery centers in Ukraine, Poland and Northern Macedonia.

The company serves as a technical provider for Tier 1 iGaming companies and has 6+ years of continuous collaboration with clients in this domain. The scaled Agile approach is at the heart of the company, and our own Agile Transformation coalition has trained our gaming and betting clients to operate more quickly and report increased revenue flow as a result.

Symphony Solutions is an ideal partner for clients who seek sophisticated user experience with sportsbook associate applications and an edge in delivering new dedicated, customized features.

CONTACT US

Our iGaming experts are in touch with every relevant trend happening in the industry. With their insights we bring the latest news to the users on the other side of the screen.

Helping companies in the iGaming industry move with their digital transformation is our domain. Contact our iGaming expert if you have any questions or want to discuss how service design can help you achieve digital transformation more efficiently.

symphony-solutions.com/contact-us



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An accomplished iGaming leader whose finger-prints have been left all over a large number of profitable, online brands, delighting mobile, tablet and desktop iGaming users, operators and affiliates in Europe, Latin American and Asia.



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