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Service innovation in Finland



A NATIONAL SURVEY ABOUT SERVICE BUSINESS AND
INNOVATION IN FINLAND 2011

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Abstract

The role and importance of service business has increased in last decades. Services offer possibilities for a competitive advantage but this require continuous service development in order to improve value creation of customers. Design Centre MUOVA studied the status of service business and service innovation and design in Finnish companies in a national survey. The study pointed out that companies need to tackle service innovation and business in a strategic manner including commitment to service business, proper resourcing, and suitable tools. Service-oriented companies succeed better in service innovation, which encourages other companies to harvest the potential of service business.

Tiivistelmä

Palveluliiketoiminnan merkitys ja tärkeys ovat kasvaneet viime vuosikymmeninä. Palvelut tarjoavat mahdollisuuden kilpailuetuun, mutta tämä edellyttää jatkuvaa palvelukehitystä kohti entistä parempaa asiakasarvoa. Muotoilukeskus MUOVA tutki palveluliiketoiminnan, palveluinnovoinnin ja –muotoilun nykytilaa suomalaisissa yrityksissä kansallisen kyselyn avulla. Tutkimus osoitti, että yrityksiä on tarpeen huolehtia palveluliiketoiminnasta ja -innovoinnista strategisesti, mikä sisältää sitoutumisen palveluliiketoimintaan, oikeanlaisen resursoinnin sekä sopivat työkalut palveluinnovointiin. Palveluorientoituneet yritykset menestyvät paremmin palveluinnovoinnissa, mikä kannustaa muita yrityksiä hyödyntämään palveluliiketoiminnan mahdollisuudet.

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1. Service business and innovation

The role and importance of services has in a few decades changed from a by-product to a more dominant way of doing business. At the same time the quality of service has been recognized as an increasingly critical area in the eyes of customers as well as a competitive advantage for the companies. (Wellemin, 1984.) However, the increase of new products and services has made customers aware of more meaningful aspects of service than service quality. Some researchers claim that good quality itself is not enough anymore, and instead, the focus should be on the customer value and on personalized consumer experiences (Prahalad & Ramaswamy, 2004).

The tightening competition pushes companies to create a deeper understanding about customers and their needs as well as changes in the markets. In order to foster service business as a competitive asset, it is important to understand what the role of service business is in companies, how they practice service innovation and how they manage service value. In addition, service design has emerged as a methodology for service innovation, but the status of service design in companies is yet to be discovered. The following chapters view shortly these main topics before describing the national survey of service business and service innovation in Finland.

1.1 Service innovation

Service innovation studies have pointed out the importance of idea generation, idea screening and concept development. Customer interaction and customer input are emphasized in the early phases of service innovation. (Alam et al., 2002, Cooper et al., 2006.) Companies use research methods mainly for identifying development problems and for improving the success rate of product innovations. (Nijssen et al., 1995.) Also Alam et al., (2002) stress the significance of other than traditional market research methods to gain more innovative information. It would also be important to have a clear procedure for gaining customer input during service development projects.

According to Oke (2007) successful innovation management requires good performance in five key areas. These areas are 1) innovation strategy, 2) creativity and idea management, 3) selection and portfolio management, 4) implementation management and 5) human resource management. Innovation strategy sets a ground for all innovation activity by defining the role of innovation for the company and its employees. It should also determine the key areas and needs for innovation as well as communicate clearly the importance of innovation to the personnel.

(Oke, 2007). Managers play a central role in innovation strategy implementation, and their commitment encourages personnel to achieve better results with an innovation processes.

The second and third phases of innovation strategy comprise the necessary tasks for creating an innovation. These phases include the process of generating, selecting and transforming ideas into commercial services or products. Firms with formal innovation processes tend to be more effective in producing new innovations than firms that carry out innovation processes more irregularly. (Oke, 2007) The fifth phase, human resource management can be seen as the glue holding all the phases together. Its main focus is to create an environment that motivates and supports innovation climate and processes within the organization. (See figure 2.)

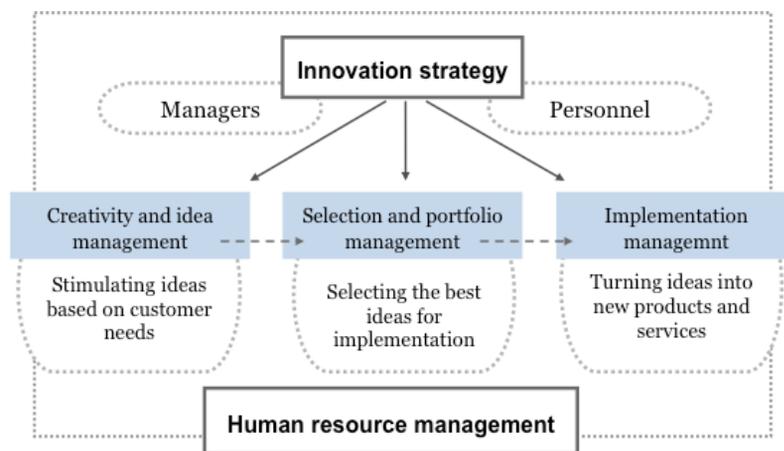


Figure 2. Phases of innovation management (Oke 2007).

The Oke’s model for innovation management describes the main phases of the innovation process, but does not cover methodological aspects of the process. There is still a need to understand, how the service innovations are developed. It specially lacks explanations about the source of creativity and idea management, the criteria for selection of ideas and the assessment of implementation. We state that value management is the key to describe successful service innovation and therefore, the companies need concrete methods to manage service value during the innovation activities.

1.2 Value management in service business

Managing customer value with all the psychological and individual aspects can be challenging for the company management. Therefore, the critical point is to understand and to identify what the customers value and why, and how these values can be operationalized and maintained as a company's competitive advantage. Grönroos (2009) has established a model for service management that builds upon a comprehensive service concept: Customer relationships are the main driving force for the company and its strategy. When the traditional focus on service and product marketing models has been on value distribution and the outcome of the service process, the relationship model emphasizes the customers' role in value creation. (Grönroos, 2009.)

Customer value has been defined as a ratio between benefits and costs – what the customer gives to and what he gets from service (Sandström et al., 2008) or a trade-off between quality and sacrifice that include both monetary and psychological disadvantages (Grönroos, 2009). This kind of dual thinking has since evolved into more customer-centred direction, which suggests that service users are co-creators of customer value, at the same time they are users who evaluate and use a service. In addition, customer value is linked to customer experience. Sandström et al. (2008) point out that the service experience is the main thing that effects customer's perception of value. In this sense, value in use is the result of a cognitive assessment of the service experience including different functional and emotional dimensions. In other words, the value of service is based on its meaning to a customer (Pihlström, 2008).

To coarsely sum up the discussion on customer value, such aspects as service quality, cost and benefit as well as customer experience and meaning play important roles in customer value creation process. The traditional customer research methods face their limitations when entering to such fields as customer expectations and meanings. It is challenging to manage service qualities that affect experiences, values and meanings visibly or subconsciously. The aspects are highly subjective and hard to manage in the service development and innovation prospect without proper tools. (Zeithaml, 1998.) A notion of a new management regime can be addressed – the management on service value, and a need to link this new management approach to the development phase of the services: a company's innovation process. We presume, that service design methods can give valuable tools for companies to develop successful services.

1.3 Service design methods for innovation

Service design is an interdisciplinary field of design that combines methods and tools from various disciplines under design thinking. Finnish service design network has defined service design “as

design of experiences taken place in time and place, which reach people through touchpoints" (<http://www.servicedesign.fi>). According to Mager (2004) service design *"focuses on experiences of users supported by service provider, and it aims at affecting a purpose of usage, functionality, usability, desirability, ergonomics and ecological and aesthetic factors of services"* (Mager, 2004). In the core of service design is designing the service experiences, which creates a strong link between service value management and service design.

Service design focuses on customer experiences from the emotional and functional point of view. Experiences are produced through concrete connections between a service provider and a customer called touchpoints. (See Mager, 2004; Moritz 2008) Service is not only about concrete service platforms, touchpoints, between a service provider and a customer. Service is also a use process that evolves in a time frame, which emphasizes the need for tackling the temporal aspects of service. Service moments are distinctive episodes of a longer process experienced by a customer. Service moments create a rhythm and a pace for a service (Stickdorn & Snider, 2010). The whole process is a service journey. Customer experiences the journey in a unique way, while the experience is never stable. Companies can guide a service journey, but not dictate it.

Moritz (2008) has classified service design process into six phases: understanding, thinking, generating, filtering, explaining and realizing. The classification is a general one, which requires descriptions of suitable methods for implementing each phase in order to understand the nature of service design process. Service design has an impressive set of tools and methods for the service innovation process, especially for the early stages of the innovation process. Service design involves methods for understanding users and their needs in a comprehensive way as well as participatory methods for collective development in teams. Visualization techniques help teams to communicate about the development issues and creative methods for generating new ideas and solutions for task at hand. (See Stickdorn & Sneider, 2010.)

The previous research related to the subject has offered understanding about service innovation management, value management and service design methods in the fields of management, marketing, innovation and design research. There is a gap in research for understanding present practices in service innovation, the familiarity of service design methods and state of service business of Finnish companies in general.

2. Research objectives and methods

The aim of the study was to gain information about the status of service innovation and service business in the Finnish companies. The national survey on service business was conducted between August and September 2011. The data was collected on the Webropol program. The inquiry was sent to 55.000 CEOs by email, and the email list was acquired from the Markkinointirekisteri. All together, 2751 company representatives answered to the inquiry. Thereby, the response rate was 5 %, which can be seen as moderate in this kind of untargeted survey.

The responding companies represented the distribution of Finnish companies in terms of company sizes fairly well. Medium-sized and big companies were emphasized in the survey compared to overall distribution of the companies. 75 % of the respondents worked in the companies with less than 10 persons (the percentage of the Finnish companies in general is 94 % in 2011, based on Statistics Finland). 18 % of the respondents represented the companies of 10–50 persons (5 % in general in Finland) and 5 % companies with 50–250 persons (1 % in general). The share of the big companies with personnel of over 250 employees was 3 % (0,2 % in general).

In addition to company size, the study collected information about the main field of industry. The categorisation in the survey followed the standard industrial classification of Statistics Finland. The biggest field of industry was wholesale and retail trade with 11,7 %. Production industry with 10 % and Information and communication with 8 % were also significant groups. 7 % of the respondents operated on the field of administration and support services, 6 % on scientific and technical field, 6 % on accommodation and foodservice, and 5 % on the field of transportation and storage.

2751 companies participated to the survey about service business and service innovation.





The state of service business and service innovation in Finland 2011

A national survey

3. The role of service business in the Finnish companies

Over a half of the companies found services very important for their business (69 %). Services are fairly important for 16 % of the companies and not so important for 7 % of companies. The result shows, that mainly service-oriented companies have responded to the survey. Service business has gained growing interest in the majority of the companies in the last three years. 17 % expressed significant increase in service business and 44 % moderate increase. Service business has stayed the same during the last three years in 29 % of the companies. Only 10 % of the companies have found decrease of service business in their companies.

The challenges in service business varied greatly among the respondents. The three biggest problems were pricing of services (41 %), the lack of human resources (39 %), and the costs of service production (34 %). Also the costs of service development (22 %) and marketing of service products (26 %) causes difficulties in the companies. It was interesting to notice that the companies also found it challenging to understand customer needs and expectations (24 %) and to develop service concepts valuable for customers (24 %).

70 % of companies find services as very important for their business.

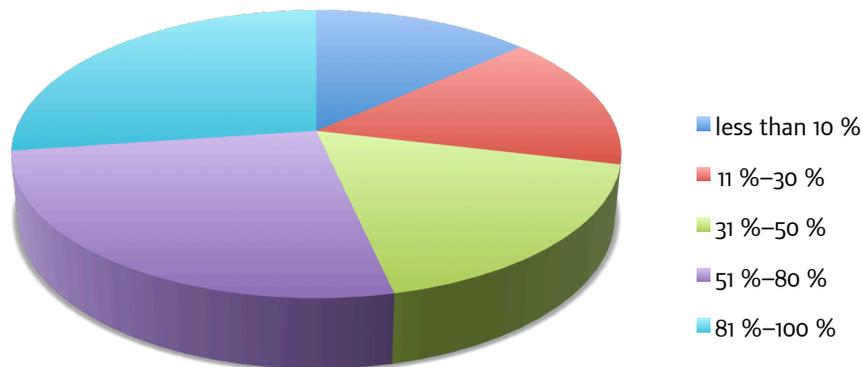


Figure 1. Success rates of service development

The study showed that service innovation is fairly successful in the companies. 27 % said that 81–100 % of their services are profitable after one year of launching a new service. 26 % of the respondents estimated that the success rate is 51–80 %, and in the 18 % of the companies the success rate was 31–50 %. (See figure 1.) However, the study shows that there is still a need for improving service innovation processes.

3.1 The status of service development

The survey asked the respondents to evaluate the strategic level of the service development in companies. Almost all companies have defined service business and development in the strategy (45 % agree and 38 % agreed more or less). Still, only 12 % have modelled and described the processes of service development. 37 % of the respondents have described service development process to some extent, and up to 44 % have not modelled their development process.

The following statements opened the results of strategic level of service development. 37 % of the companies have defined a person responsible for the service development. In 35 % of the companies that is done to some extent and as much as in 42 % there are no responsible persons for the service development. 42 % of the respondents informed that services are developed along with other work duties and 37 % agreed to develop service on the side to a certain extent. This result reflects the lack of personnel in service business. In addition, the companies do not utilize external resources in service development. 88 % of the companies have not outsourced parts of service development and 41 % of the respondents reinforce service development with external resources only occasionally.

Service business is defined well in strategies, but service development lacks responsible persons and outsourced expertise.



We also asked the respondents to evaluate the significance of different expertise in service development. Design was not appreciated in service development and as much as 46 % did not see design expertise important for service development at all. Instead, marketing was seen as important (very or fairly important for the 95 % of the companies) as well as ICT (very or

Marketing, ICT and management are important competences in service development, while service design was fairly unfamiliar to companies.



fairly important for the 90 % of the companies) and management (91 %). Also financial administration (84 %) and psychology (80 %) were seen as important expertise in service development.

Design-related methods and service design were quite unfamiliar to the majority of the companies. 39 % of the companies have used design in generating service ideas. Service concepts were developed with design in 38 % of the companies. Design has been used in visualizing services in 34 % of the companies. Interior design was familiar to 36 %. Categorization of the users into user personas has been done in 43 % of the companies (9 % regularly), while 57 % has not used the method. The most important way to use design in service development was graphic design (49 %). Almost as popular was using design as a support for marketing of service products (46 % of the companies).

3.2 Service innovation tools

For service innovation it is important to understand how companies develop services and what kind of methods and tools they use in service innovation processes. Service development was divided into two main phases: customer and market understanding and idea and concept generation.

The inquiry showed that a very important source for customer information was collection of customer feedback. Still, only 34 % of the respondents acquire customer feedback with regularity. 53 % collects feedback occasionally and 12 % does not collect feedback at all (The sum of using the method is c. 86 %). Customer satisfaction surveys are carried out regularly only in 17 % of the companies and occasionally in 42 % (the sum 59 %). According to the respondents, even 38 % of the companies do not follow customer satisfaction. User research was not more familiar than other ways of gaining customer understanding. Only 9 % studied users systemically and 30 % casually (the sum 39 %). Testing services with users divided companies. 25 % informed they test services regularly and 48 % occasionally. Compared to these results, it is surprising that as many as 61 % of the companies have at least some kind of a customer information system.

Participation of customers in the service development was fairly known among the companies. 18 % of the companies take customers to their development projects

The minority of companies studies customers regularly. However, almost all companies use sales personnel as a source of customer information.



regularly, but 55 % does it occasionally (the sum 74 %). Almost all companies use sales personnel as a source for the information on customers. 33 % of the companies' sales personnel not only collected but also transferred customer information to service development systematically and even 58 % occasionally (the sum 91 %).

Social media was a surprisingly common method for understanding customers. Still, the survey showed some possible improvements. 25 % responded that they follow social media regularly and 43 % occasionally. Instead, communicating with customers was quite unfamiliar. 55 % of the companies did not communicate with customers in social media, while only 11 % communicated regularly.

Based on the survey, almost all companies gain market understanding by following their competitors. Up to 50 % of the respondents follow competitors continuously and 44 % occasionally. Also exhibitions and media are important for market knowledge (exhibitions: 24 % regularly and 52 % occasionally, media: 30 % regularly and 50 % occasionally). Instead, trend analysis, technological mapping and market research are rarely used methods for understanding markets. 72 % does not use trend analysis, 72 % technological surveys and 67 % market research. Surveys on field of business are a more common way of producing market understanding. 24 % are using them regularly and as much as 55 % occasionally. Even more important way of gaining market understanding is cooperation with other business partners (regularly 46 %, occasionally 45 %). On the other hand, cooperation with research organisations is fairly unfamiliar to the companies and only 8 % does it regularly and 61 % does not do it at all.

Competitor monitoring and collaboration with business partners are main sources for market understanding. Systematic methods are rarely used.

Service development starts often from a company management. According to the survey 74 % of the respondents agrees that company management gives service ideas to the personnel to be developed further. Service ideas can also start from the corporate strategy (27 % fully agree, 46 % agree to some extent). In the half of the companies, the source of new ideas is personnel (25 % fully agrees and 52 %

Service development starts typically as a reaction to customer needs or to the moves of competitors. The main internal source of service ideas is a company management.

agrees to some extent). Mostly, companies lack established teams in service development. Only in 12 % of the companies service teams are developing service ideas (fully agrees) and 52 % of the companies does not develop ideas in teams at all.

Competitors are also quite important sources of new ideas. 81 % follows the development of competitors' service (agrees fully or to some extent). Even a more important source of new service ideas is customer needs (88 % agrees fully or to some extent). In addition, customers send service ideas to 63 % of the companies (19 % agree and 44 % agree to some extent).

The companies are not significantly using external recourses in their idea and concept generation. Benchmarking other fields is still fairly rare and only 7 % fully agrees that they do benchmarks (28 % agrees to some extent). External experts are not often used in the service development, either. Only 3 % of the companies fully agree and 15 % slightly agree on the usage of external experts in idea generation.

New service ideas are generated seldom based on benchmarking or external experts.



We also wanted to understand what kind of tools Finnish companies use in their idea and concept generation. In general, we discovered that special tools or ways of working are not in active use in the companies. Workshops are in constant use in 11 % of the companies and a half does not use them at all (49 %). Modelling the service processes are regularly used in 11 %, while a half does not do it (49 %). Blueprinting is almost unknown to the companies, because only 2 % use it regularly and 67 % do not use it at all.

Visualization of the services contact points is used regularly in 5 %, while 59 % does not use visualizations. The descriptions of service features are a bit more popular. 21 % of the companies describe service features regularly and 39 % occasionally. The illustrations of service moments or situations are still quite unusual method for the companies. Only 8 % uses illustrations regularly, 30 % occasionally and 54 % does not use them.

Service moments are simulated regularly only in 7 % and occasionally 27 %. Also storyboards are even more rare method for the companies: 3 % regularly and 64 % not at all. Describing customers service journeys or paths are more popular. In 10 % of the companies, service journeys are used regularly and 30 % occasionally.

Service design tools are almost unused in companies. The most important development tool is description of service features.



3.3 Managing service value

The survey also covered questions related to management of service value in an innovation process. The survey stated arguments for respondents and asked them to assess the relevance of the arguments to their business. The study depicted the management of service value related to service innovation process: user understanding, service alternatives for different customer groups, service quality, and customer feedback.

28 % of the companies collect customer understanding regularly in the beginning of the service development process and 50 % to some extent (total 86 %). Alternative services or service features are offered to customers regularly in 42 % of the companies, in 44 % to some extent (total 85 %). 83 % of the companies develop service quality at least fairly systemically. It was interesting to notice that 91 % of the companies claim that customers' service experience is the main starting point for service development, and therefore the most important way of managing service value.

Service value is managed mainly through service variations and quality. The key driver is customer experience.



According to the survey, 86 % of the companies said that the price is linked to the service features at least to some extent. Customer feedback is collected systematically in 75 % of the companies, and in 77 % of the companies the feedback is also analysed and utilized at least to some extent in the service development. Instead, testing the service concepts or prototypes was fairly unknown among the respondents. Only 13 % tests them regularly and up to 48 % does not use testing at all in order to manage service value.

3.4 Service business according to company size and success rate

The cross tabling was carried out on the quantitative research data in terms of three parameters: the size of the company, the importance of the services to the company and the success rate of new services. First, we present the results of the cross tabling according to the company size.

Based on the survey, the role of service business is very important to the companies fewer than 250 persons. The percentages varied between 69 % and 71 %. And in the big companies (over 250 persons) the percentage was between 48 % and 50 %. Service business

Service business is more important to SMEs than to bigger companies.



has increased its importance in most of the small and medium-sized companies (25–29 % in companies of 11–250 persons) during the last three years. Instead, only 15 % of the micro companies (under 10 persons) and 13 % of the big companies saw increase of service business. Instead, the big companies estimate that service business will develop during the next three years (in 38 % of the companies), while only 14 % of the micro companies will increase their service business in the future.

The companies did not vary significantly in respect of profitability of the new services. One surprising finding was that big companies with highest success rate (81–100 %) did not produce profitable new services as often as smaller companies. While big companies with high success rate developed profitable services in 9 % of the cases, micro companies reached to 28 % and small companies to 26 %.

Successful SMEs produce profitable services more often than successful big companies.



It seems that big companies define the service business a bit better in their strategies. 42 % of the small companies agree on the statement regarding the definition of service business in the strategy, while 68 % of the big companies agree on the statement.

We also checked if the companies differ according to the service development methods. Big companies collect customer information more systematically than small companies. 29 % of micro companies and 67 % of the big companies collect customer information regularly. The situation is the same, when we view conducting customer satisfaction surveys

Big companies use service development methods systematically more often than SMEs.



(small companies 11 % and big companies 58 %). Also market understanding was more important to big companies. Big companies map competitors and technologies more than smaller companies. The reason might be a lack of resources and close relationship with customers.

There seems to be the same kind of trend regarding the methods used in service development. Big companies use more different kind of methods, whether it was modelling service processes of visualizing contact points of a service. Small companies, instead, offered different kind of services or service features to the customer, and therefore they tailor services more than big companies.

The survey verifies that the service-dependent companies not only have increased service business during the last three years but also have also decided to invest in services in the future too. At the same time the number of the companies, which do not find services as important to their business service business has been the same or even decreased. But also these companies are reporting some kind of increase of service business in the future. It seems that service-orientation is also beneficial for the companies with lower emphasis on services. In general, the service-oriented companies gain higher success rate of new services. Big differences can be found in the low-success-rate companies – if service business is not important for companies, they also fail more often than other companies.

Service-oriented companies success in service innovation and create a head start in service business.

The data was cross-tabled according the success rate of new services. The aim of the analysis was to find out productive ways of working as well as other causes behind the success of service business. According to the survey, the companies using the development methods in service innovation gained higher success rate. For example, if service development processes are modelled and described, companies have higher success rate. Systematically collected customer information shows in better success rate. Surprisingly, the systematic acquisition of market understanding does not induce in the success of service development.

Systematic service development and teamwork results in a better success rate of innovations – except market understanding.

Idea and concept generation is a critical phase in service development. It seems that corporate strategy as a starting point for service development increases the success rate of new services. Also service development carried out in teams heightened the success of new services. At the same time the study shows that multidisciplinary service development does not significantly increase success rate of new services. This is a surprising finding compared to other studies.

4. Conclusions

The significance of service business for the national economy grows in Finland. Therefore, it makes a difference how service innovations are developed and how resources are allocated to service development. In 2011, systematic methods for gaining customer and market understanding as well as generating service ideas and concepts were weakly among companies. Therefore, it is not surprising that Finnish companies were not using service design methods. Despite the lack of customer and market-oriented development methods, companies managed to develop successful services. Over a half of the companies succeeded in over a half of the service development projects and managed to produce profitable services after one year of launching them.

Based on the survey, services are an important competitive factor for the SMEs. SMEs launch more profitable new services than bigger companies. It is also more important for SMEs to tailor services based on customer needs. Service business has a bigger role in SMEs and it has strengthened its position especially in the medium-sized companies. The situation may change, because big companies are now focusing more on service business. For SMEs, this may mean losing one important competitive advantage.

In service development, market understanding is created mainly through competitors, business partners and general surveys on field of industry. It means that the companies are highly linked to their own field of industry. The source of customer information is basically sales personnel. Systematic customer and user research do not have a standing position in service development. The companies are inactive in collecting information from the other fields or following trends, which can restrict their development of radical service innovations.

Based on the survey, development of service business should be a strategic question to companies. Service-oriented companies succeed in service innovations and the role of service business is more important to them. On the other hand, a lot of resources for service innovation remain unused, both internally and externally, which opens new possibilities for gaining competitive advantages. The efforts a company puts to the service development pay back in short period of time if a company commits to service innovation.

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