



Become the next distance learning superstar: a design sprint

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Case Study

Gamification Concepts



Creative Confidence

GOALS

AUDIENCE

MECHANICS

EXPERIENCE

GOAL

Reduce the number of emails for which the answer is “It is in the bleeping syllabus”

MECHANICS

**Choose at least 4 of
the cards to construct
your solution**

15 minutes





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If you would like to learn more about using gamification to level up your learners' experiences, contact me.

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CHALLENGE

Could you structure the course as a series of challenges or let people challenge one another?

CHANCE

Are there instances
where you could
impose some
randomness?

CHARACTER

Will you use characters in stories or scenarios, or let people take on a persona using an avatar?

CHOICE

Can you give people choices of activities or let them decide the method or order of completing them?

COLLABORATION

Will there be any collaborative activities within the course or interactions with people outside of the course?

COLLECTIONS

Will there be any types of items to be collected, such as achievements, badges, or actual physical items?

COMMUNITY

How will you build a community within your project and give people a sense of belonging?

COMPETENCE

How will you make
their progress visible
and/or assess their
performance?

COMPETITION

Will there be any competitive elements on the individual and/or group level?

CREATIVITY

How can you encourage creative expression or let them personalize their environment?

CURIOSITY

How will you capture
people's attention and
continue to inspire
their curiosity?

CURRENCY

Could you include a virtual currency that could be traded, gifted, or used to purchase real or virtual items?



MISSION DEBRIEF: OPERATION ECSU

EXPLORING OUR CUSTOMER SERVICE UNIVERSE:
MOVING BEYOND EXPECTATIONS

4 CS TO AN A+
LEARNING EXPERIENCE



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“I see rockets!” That was the exclamation by one of the two sponsoring managers that launched Weil, an international law firm, into a gamified learning adventure that saw remarkable results and has participants still talking about it, many years later.

The manager’s comment came in the first design meeting with our vendor. We had contracted with them to help us design and conduct an innovative program to address customer service of the non-legal staff at the firm. We are a large firm with over one thousand attorneys, so we have departments that address a host of supporting functions - secretarial and document services, reception and conference center, reprographics, financial services including payroll and billing, office facilities, and more. These staff members often do not get to interact with one another on a regular basis and may never have met, despite the fact that many of our employees have worked at the firm for decades.

Our mission for this new training program was to break new frontiers in all levels of customer service. That’s where the rockets came in. The manager didn’t want a metaphor like climbing a mountain, because, as she said, once you improve service and reach the top, there would only be one way to go - down. And that was not the message we wanted to send. We wanted people to continue to find new ways to exceed expectations, surprise and delight customers, and embark on an ongoing journey. Hence the theme we landed upon - the never-ending expanse of space.

While the following isn’t intended to be a full debriefing of the course we ended up creating, I do want to share a few key gameful elements we chose to use that proved to be effective. We also had some missteps along the way, but those simply ended up making the program better because that required us to keep iterating and improving.

In keeping with the structure of the 4 Cs to an A+ Learning Experience, I will highlight four words beginning with C (although

not necessarily the ones used in the workshop): Champions, Community, Checklists, and Consistency.

CHAMPIONS

One of the most crucial aspects of any project in the workplace, whether it is employing gamification or not, is to have those who will champion the project. These people can come from many different roles and can enter the project at various times. In our project, for instance, there were two managers who came up with the idea of creating an innovative new program around awareness and improvement of internal customer service. It was their desire, energy, and support that provided the resources to bring the program to life.

Along the way, they brought in others who they felt would also be advocates. I was the first they brought in. As we rolled the program out we hand-selected early participants with the idea of encouraging others to take the lead and help build and maintain the momentum the program needed to succeed. A lot of momentum and ongoing bursts of fresh energy were going to be needed because the program was going to be running over approximately two years and we knew that some of the intended audience were going to be resistant to participating.

Most of the employees who would be participating had been with the firm for many years and would be skeptical about receiving training about something they believed they already knew. Some had referred to it as “be nice training,” and said things like “if someone doesn’t know how to have manners, you aren’t going to change that.” Of course, the program was neither about being nice nor manners. Others were just resistant to change, already struggling in a stressful environment where technology was getting ahead of them. On top of this, even for those who were more willing and eager to learn new things and explore new technology, the blended format of this program was going to be very different from anything they had encountered before. It would be much more

self-paced and self-monitored. This was a whole new world for them.

While I am being honest about the varying motivational levels of the learners at the outset, it cannot be overlooked that a lot of an employee's willingness to participate in training comes from their immediate supervisor. Ideally, you would like to get all of the supervisors who were to have staff members participating in the course into the realm of champions. Ultimately, their support, or lack thereof, will have a much greater effect on the behavior changes of their staff than any training program can bring about. This was a challenge we also faced as we knew that there were a few within the supervisory ranks who were among the resistant participants. We tried to mitigate the impact of this challenge through mentoring and how we reported the progress of their direct reports' participation (this is discussed further in the Community section below).

COMMUNITY

Particularly because of the subject matter of this program, there was a tremendous focus on developing community. We used a variety of methods and gameful elements to achieve this, including, but limited to, discussion boards, mixing participants from different departments, competition, collaboration, and leaderboards.

Flight Crews

The discussion boards were a place for each cohort, which we called a flight crew, to communicate with one another and complete activities where they were asked to reflect and respond to specific questions. One feature that was somewhat unique to these discussion boards was that any discussion was kept completely private from anyone outside of the flight crew, including their supervisors and managers. We wanted to have a space that was safe for the participants to express themselves openly without worrying about repercussions from management.

The members of each flight crew were specifically selected to ensure a mixture of employees from different departments. This was done to provide employees who may not have communicated much in the past an opportunity to educate one another about the specific roles they had and the challenges their group faced in the overall customer service chain. Also, before any employee could be scheduled for training, their immediate supervisor or manager had to have already completed the program. This was necessary because there were activities in the course in which the participants would collaborate with, and be mentored by, their supervisor. It was imperative that those supervisors had experienced being on the participant side of these activities so that they fully understood the importance of these activities and how best to conduct them.

Activities throughout the program varied between individual and collaborative activities, with a number of activities that involved people outside of the flight crew. Again, the program was structured in this manner to stress the importance of everyone's part in the overall customer service delivery chain.

There were two community elements that participants found particularly powerful. The first was a handout they received in the early part of the program called Postcards from Space which contained anonymous messages from previous flight crews to the current flight crew. These were words of encouragement, tips on handling the 6-week-long format, and sometimes just fun statements like "May the force be with you." Knowing that others had taken the journey and were leaving positive messages helped the participants to have more confidence in themselves and in the program.

The other extremely high-impact activity was called Make My Day emails. We encouraged participants to show peer appreciation in instances where someone had gone above and beyond. This created engagement on many levels. If the person receiving the email had been through the course, this was re-enforcement that helped keep them motivated to continue offering better customer service. If

the person receiving the email had not participated yet, it was an unexpected moment of recognition that helped prime them for participation in the program. It also helped people learn how to give feedback since the emails had to be very specific about what they were recognizing the recipient for.

Leaderboards

Another aspect of community involved tracking their results. All completed activities were awarded points. Rather than showing these on a public leaderboard, however, they were simply kept by the program facilitator in a spreadsheet. Each flight crew was composed of 16-22 people, and at the end of each course the top two point earners were awarded gift cards. This was never heavily promoted, nor did most participants seem particularly driven by these rewards. The facilitator would make comments in the weekly announcements highlighting particular achievements such as the names of people who were at the top of the leaderboard or who had moved a significant number of places upward, but there was no leaderboard ever displayed to the participants. And no participant ever inquired where in the ranking they appeared.

One reason we used the leaderboard in this way was the earlier discussed population of resistant learners. There was concern that displaying participation, or lack thereof, would negatively impact some other employees who might be participating but not fully engaged at the start. There was no real up-side to displaying the points, as participants had a better way of tracking their progress (which is discussed below), but there was assuredly the potential for a huge down-side. Making the lack of engagement more visible could easily sway those on the fence about engaging to the "dark side." Why would they put in more effort if they saw colleagues who were not participating fully.

However, there was a second leaderboard that was visible to the supervisors and managers. This leaderboard showed the progress of each of their direct reports. In this case, applying a little peer pressure was in order to ensure that supervisors and managers

remained aware of participation and stayed motivated themselves to uphold the principles that were being taught. As noted above, any training program is at risk of failing if the behavior changes it brings about are not supported and encouraged by the supervisors and managers.

CHECKLISTS

Another area of focus that made a huge impact on the success of the program may seem almost too simple. It was the checklists that we provided. I know that these were particularly effective because we had to repackage the course halfway through when our vendor discontinued operating and the checklists were part of the redesign process. What initially seemed like a huge setback proved to be a wonderful chance to iterate and make the program even better.

As a bit of a side note, the repackaging did cause some difficult discussions with the managers who sponsored the course. One was in full agreement with taking the opportunity to not only move the content to a new platform but to do some redesigning based on lessons learned while the other was concerned that the participants in year two would be receiving something very different from those in year one. In the end, I was able to convince them that I was keeping all of the key messaging, but that we were doing all of the learners a disservice if we didn't learn from the past and adjust course as necessary.

Unless a course is 100% online and basically point and click with no activities or interactions with others, each group taking a course gets a slightly different, hopefully increasingly better, version of any course. Unfortunately, in my experience, the approach of the second manager is the rule in far too many cases. We talk about iterating and using feedback to redesign, but too often, limited resources and resistance to change result in our rolling out the same course over and over without modification. This is one area I really encourage you to try and change.

Now back to the checklists. Our course had dozens of activities that learners had to complete along their journey. While it was theoretically possible to complete the activities in a linear fashion, it was often necessary to do things out of order due to the logistics of working together on collaborative activities. We encouraged them not to wait until their partners were available but to keep working on other pieces. But for learners unaccustomed to the blended format we needed to provide extra cues to keep them on track and to ensure that they were completing all of the coursework.

In the initial design, there were certainly outlines and a syllabus and all those sorts of things, but in the redesign, I made an extra effort to create checklists using checkboxes as bullets for each activity in each module. It was amazing the power those checkboxes had. The number of questions about whether they had completed everything dropped to almost zero and they seemed much more comfortable moving around to different activities knowing that they had a clear map of all of the locations they should visit along the way. The completion rates also improved without the facilitator nudging learners or additional supervisory interventions.

Don't underestimate the power of making progress visible and take every opportunity to do so. Learners can become more self-sufficient through self-monitoring and can stay more motivated when they can see, in very tangible ways, that they are making progress toward clearly stated goals. If you want to dig further into the research around progress, you may want to look into the work Teresa Amabile has done in her book *The Progress Principle*. And if the feedback you are providing the learners involves some sort of collections, you may want to investigate the work of Joseph C. Nunes and Xavier Drèze and the Endowed Progress Effect.

CONSISTENCY

The final C for today is consistency. Specifically, consistency of the look, feel, and theme of the program. We were almost



neurotically obsessed with the theme being pervasive throughout. We wanted learners to be immersed in the experience, and we used visual cues before, during, and after they had completed the program. To be fair, not everyone was enthralled with the space theme, but then I have never encountered a program where everyone was completely happy about everything. Overall, the benefits far outweighed any eye rolls I got or comments we received about it not being necessary or serious enough. We were not trying to mandate fun, but we also did not shy away from infusing some playful moments and committing to being consistent with our messaging which was definitely supported and symbolized by the space theme.

As each new flight crew's roster was finalized the facilitator personally delivered an invite to join the crew and gave the participant a small box with Starburst(r) candies and mini Milky Way(r) bars tucked in amidst the star-covered tissue paper. The invitation was designed using the colors and imagery that they would see in the course. Before beginning the online portion of the program, they also attended a lunch and learn session that served as a course orientation and gave them a chance to interact with one another in person before the virtual communications took place. As with the invites, everything at this session was fully branded with the theme, down to the name tags, which gave them the title of Mission Specialist.

The main content of the program was not only consistent regarding the theme but we took every effort to ensure that the messaging participants received from various sources was relevant to and consistent with the context within which they worked. In the design phase we had interviewed a number of the senior leaders of the firm to get quotes and descriptions of what great customer service looked like to them. These quotes were one of the first things participants read in the program. The course instructional designer also shadowed participants from every department we expected to participate in the program to get real world examples that we could use in the content. This also helped us to get buy-

in from participants who saw that we were not just going to have them going through generic content.

At the end of the course, we brought the crew back together for a final half-day classroom experience. They worked in teams to review the content in a game-show-style competition, and then completed activities that could not be done well virtually. Next we celebrated their accomplishments and rewarded them with some token items intended to remind them of their journey. These included a "star" lapel pin that said "exceed expectations" and a cube of note paper that had the course logo and title on it that most used on their desks.

A final activity was used to ensure that the journey was not quite over. Each person made some commitments regarding their customer service plans going forward and sealed their answers in a self-addressed envelope. No one except the participant ever saw those. But six weeks after the conclusion of their journey, participants were visited in person, once again, by the facilitator. This time the envelopes were returned and the looks of surprise were priceless. When they opened them and saw what they had written, some were delighted to see that they had fulfilled their promises and others got a gentle reminder and often looked a bit sheepish. Either way, all of the participants got the message that the journey needed to continue.

IF YOU HAVE ANY QUESTIONS OR WOULD LIKE TO HEAR MORE ABOUT OUR SPACE ADVENTURE, PLEASE DON'T HESITATE TO CONTACT ME AT VALARY@VALARYWITHAWHY.COM OR VISIT WWW.VALARYWITHAWHY.COM

