Design Thinking for Learning Professionals

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blp | Bottom-Line Performance

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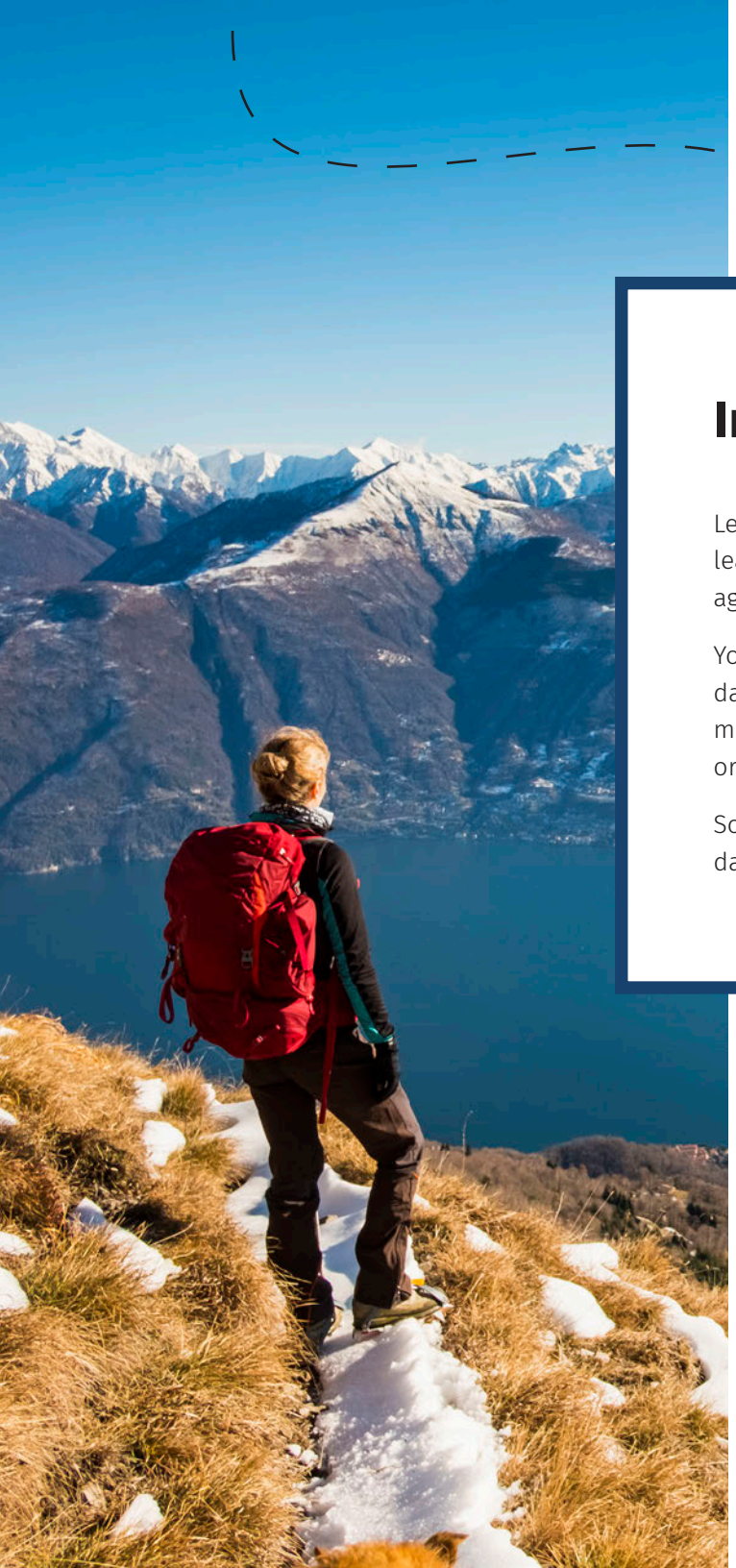


Introduction

Let's pretend you're going on vacation with your friend, Suzy. You tell Suzy to leave the planning to you. You want to ensure Suzy has a good vacation, so you agree on the timing, the climate, and the budget for the trip.

You find a perfect hiking trip for the two of you. Suzy and you have done some day hikes before so you are confident she'll love it. Your trip features daily 10-mile hikes, tent camping, and backpacking your supplies. There are no showers or indoor bathrooms.

Sounds perfect, right? You'll truly be off the grid, a respite from the frenzy of daily life... or so you think.

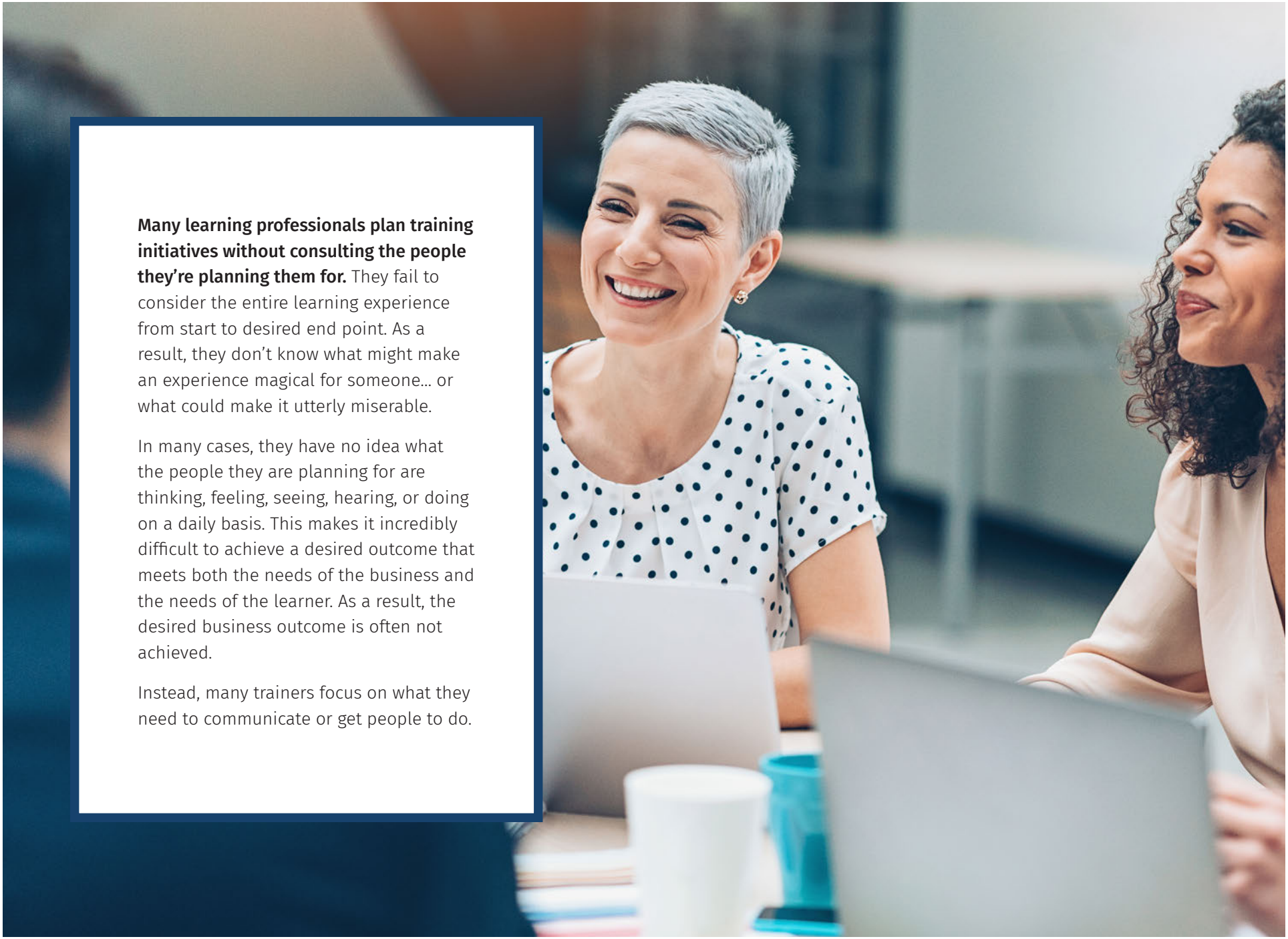
When Suzy arrives at the airport, you excitedly share your destination and itinerary. To your surprise, a look of horror passes over Suzy's face. She hates camping. Worse, her idea of an active vacation differs from yours.

To her, a week consisting of some three-mile hikes, a one-day bike rental, and time spent walking around a seaside resort town is active. She also wants a hot shower and a clean, cozy bed every night. Finally, Suzy has no desire to carry her food; she wants it served in a restaurant.

You thought you had good info on Suzy, but by failing to consult with her as you planned, you designed her worst nightmare of a vacation and you also ruined your own.

Are you thinking, “I would never do this. That’s ridiculous. Obviously, someone who is going on a vacation needs help to decide the destination and the activities. Otherwise, it might be a bad experience for that person. This is a stupid, unrealistic example.”

You’re right. It is stupid. Unfortunately, we all do different versions of this kind of planning all the time. Especially in the workplace.



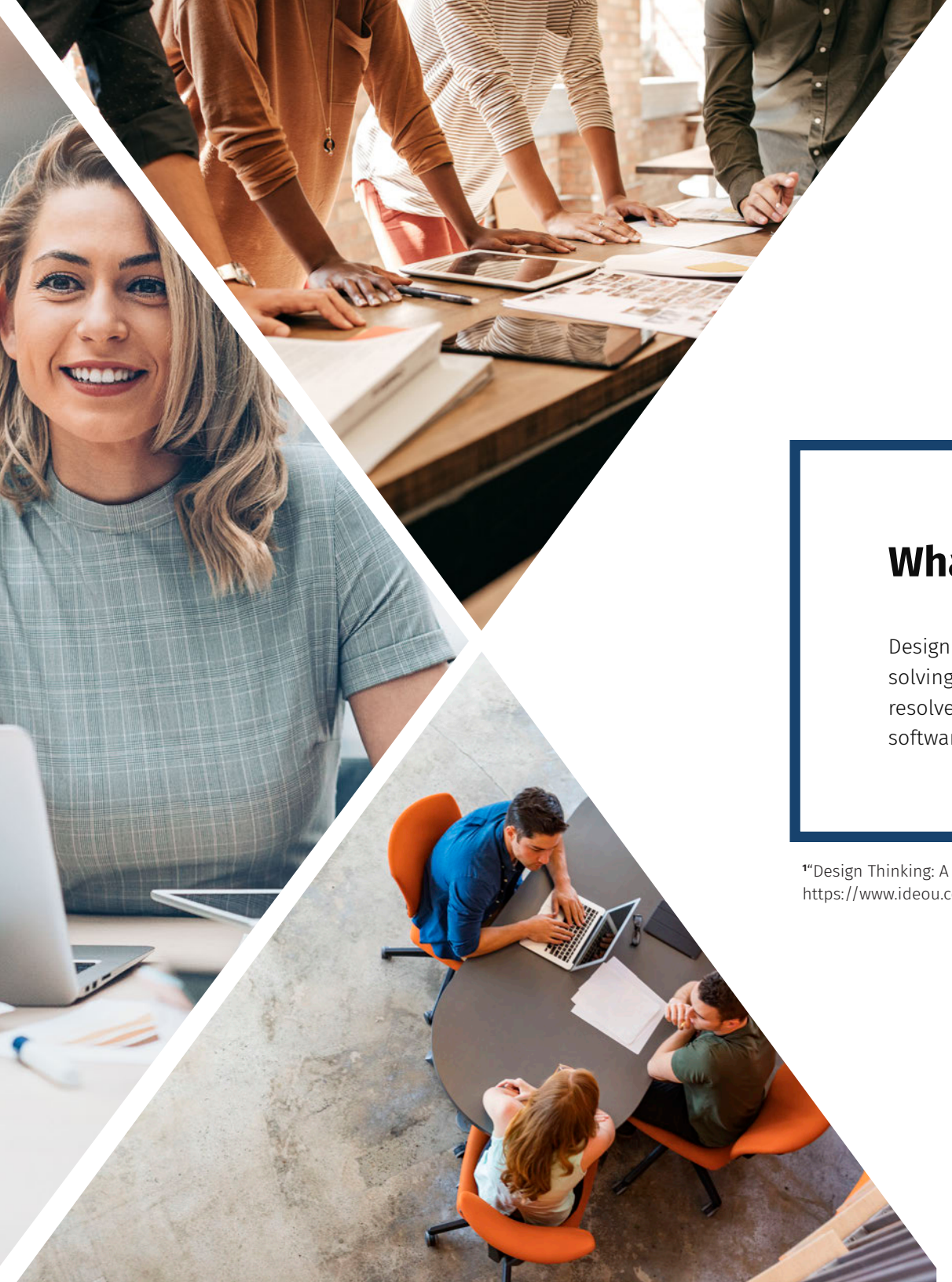
Many learning professionals plan training initiatives without consulting the people they're planning them for. They fail to consider the entire learning experience from start to desired end point. As a result, they don't know what might make an experience magical for someone… or what could make it utterly miserable.

In many cases, they have no idea what the people they are planning for are thinking, feeling, seeing, hearing, or doing on a daily basis. This makes it incredibly difficult to achieve a desired outcome that meets both the needs of the business and the needs of the learner. As a result, the desired business outcome is often not achieved.

Instead, many trainers focus on what they need to communicate or get people to do.

This eBook is designed to help you stop the crazy. It introduces a variety of tools to help you create a meaningful learning experience that adds value for learners while achieving business outcomes.

It explains what design thinking is, how it can be used to craft learning solutions, and five tools that can get you started with a design thinking approach.



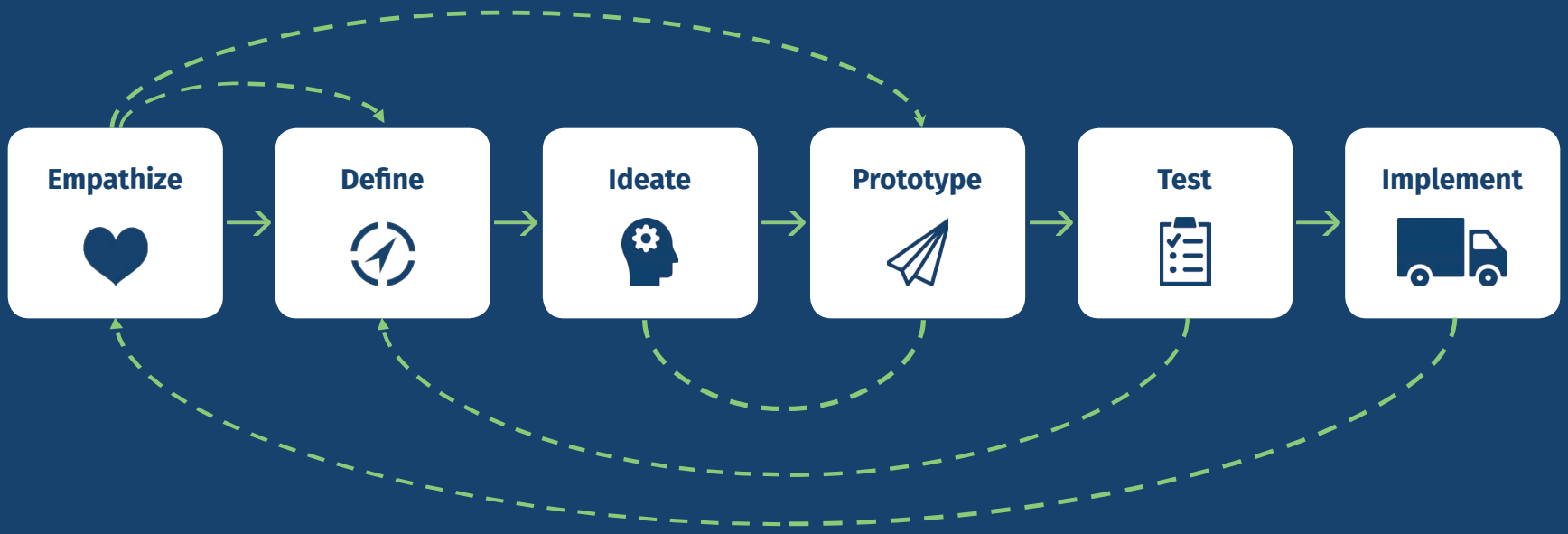
What Is Design Thinking?

Design thinking is a human-centered approach to solving problems. It has been used since the 1960s to resolve massive human challenges as well as to design software solutions and consumer products.[1]

[1] "Design Thinking: A Method for Creative Problem Solving." IDEO U. 2018. https://www.ideou.com/pages/design-thinking.

In its original form, design thinking included five steps. Many practicioners have added a sixth step, implementation, for a highly iterative process that looks like this:

Typical Design Thinking Process

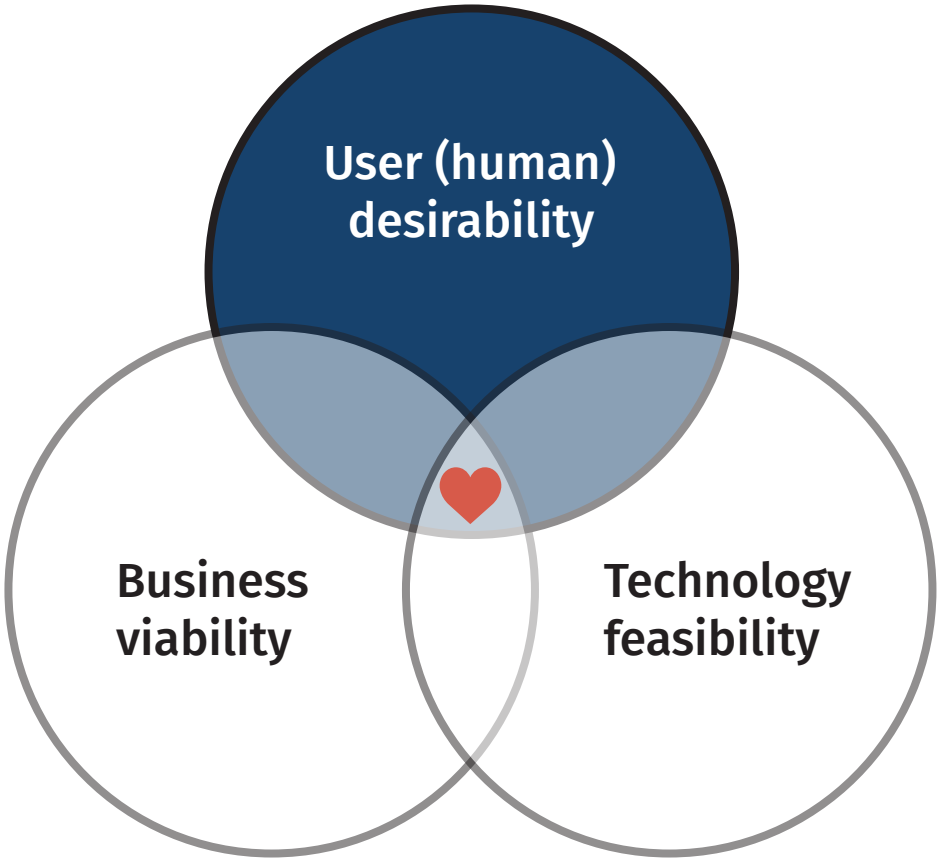


Design thinking assumes we won't design the solution to a problem the right way on the first go, and we're going to need to iterate. It also assumes the target user should play a role in designing the optimal solution.

Find the “Sweet Spot”

Design thinking seeks to find the sweet spot between user, organization, and technology. Design thinking starts with the user – or in our case, the learner – not the tasks we want them to do or the info we want them to know.

Too often solution choices are driven by two things: business viability and technology feasibility. The actual target of the solution (aka the “user”) is often not part of the conversation when decisions are made – at least in the L&D world.



What makes a “great” learning experience?

The simple definition of a great user experience is one that delivers value to the user (solves a problem they have), is easy to use, and is enjoyable to use.

Think about Uber or Lyft and the app you use to request a ride from either company. First, that service – as represented by the app – solves a huge problem for many travelers: finding safe, reliable transportation when taxis aren’t easily located.

Second, the app is super easy to use and requires no instructions. You can easily figure it out as you use it for the first time.

Third, it’s enjoyable. You have the cool little map with the image of the car as it works toward you. You can see who your driver is, how others have rated that driver, and exactly what your trip will cost you. You don’t have to tip or fumble with money. Those are all plusses that equate to enjoyable.

In Instructional Design today, the User Experience (UX) Is often poorly designed.

Why? Because learners are mostly absent from the design conversation.

Learning experiences should:

Provide value to the learner & the organization.

Be easy to use or access.

Be enjoyable.

Listening to Our Learners

Now think about your typical learning experience. What problem does that learning experience solve for the learner, as opposed to the organization? What value does it provide for them?

Many learning designers don't think of things from the learner's point of view when they design training. Too frequently, decisions are made about the design of the learning experience with no "voice of the learner" available or considered.

Subject matter experts and stakeholders assume that role – and assume they know what the learner wants, needs, and feels. They do not verify their assumptions about the learner. Decisions are based on business needs only – without factoring in the experience of the learner at all. Decisions can also be made based on what technology a company already has on hand.

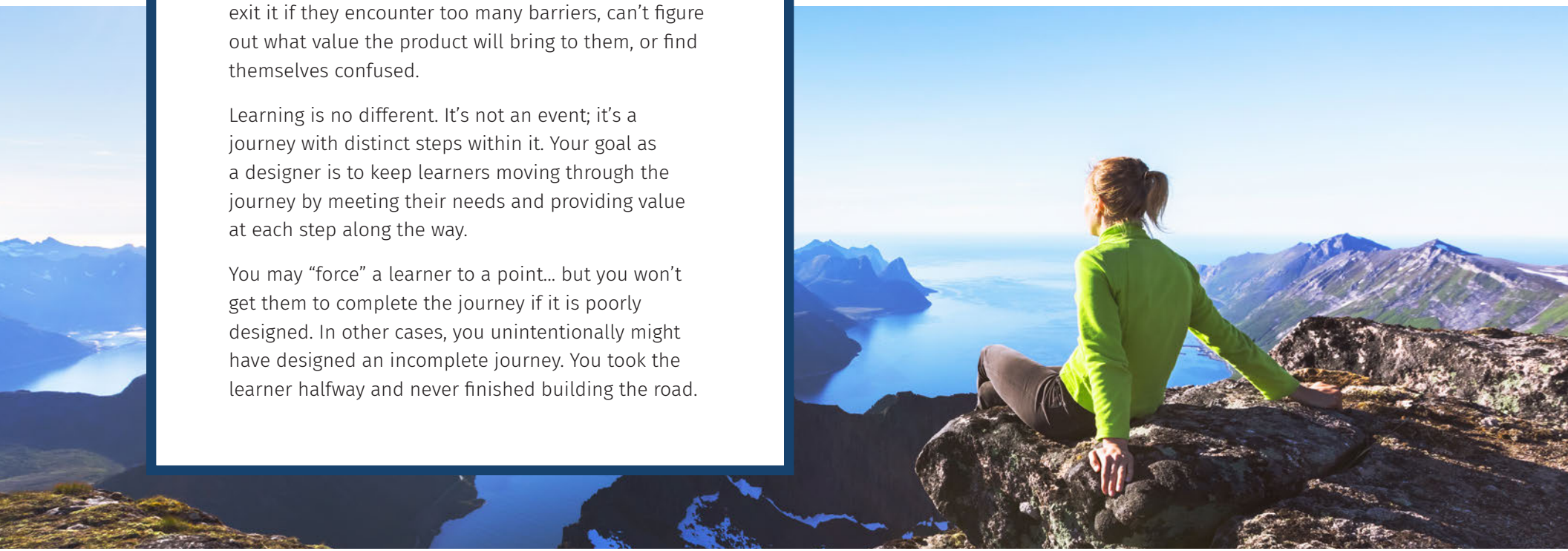
What Does Design Thinking Look Like in L&D?

Design thinkers are all about experiences – and they know experiences are more than events. They are journeys with a starting point and an ending point.

In the marketing world, marketers and product managers think about customer journeys all the time. They know that customers on a buying journey will exit it if they encounter too many barriers, can't figure out what value the product will bring to them, or find themselves confused.

Learning is no different. It's not an event; it's a journey with distinct steps within it. Your goal as a designer is to keep learners moving through the journey by meeting their needs and providing value at each step along the way.

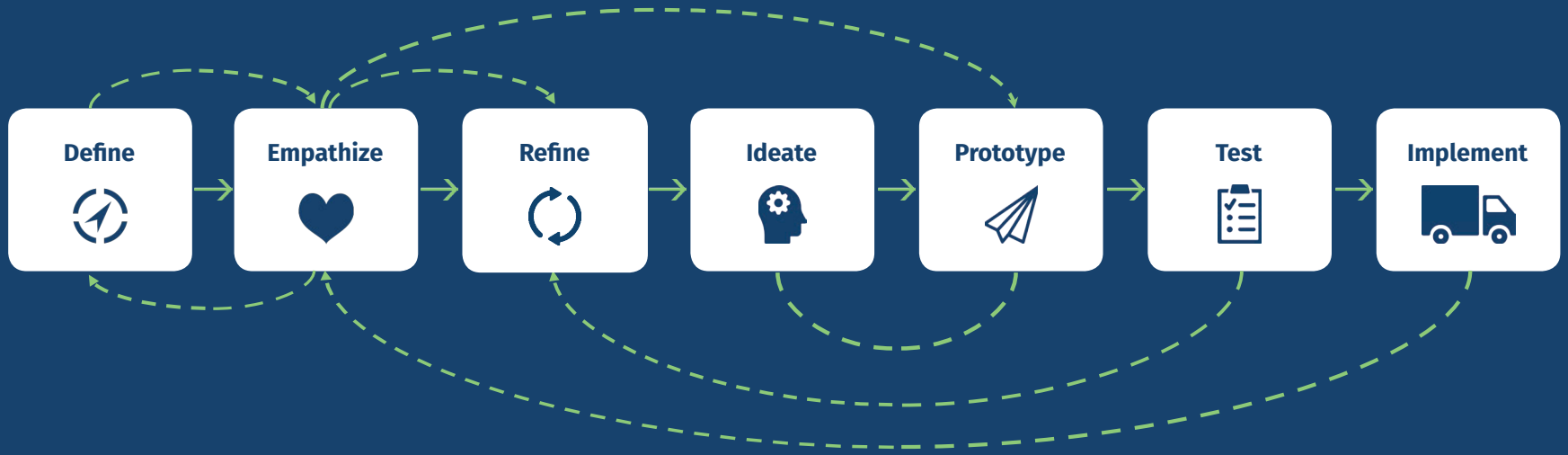
You may "force" a learner to a point... but you won't get them to complete the journey if it is poorly designed. In other cases, you unintentionally might have designed an incomplete journey. You took the learner halfway and never finished building the road.



Unlike what may happen in a product development world, an L&D practitioner usually has someone coming to them asking for a solution. They aren't trying to invent products. So, we think the design thinking model needs a bit of tweaking for the L&D world (but only a tweak).

We believe the design thinking journey starts when someone defines a perceived problem or need. So – we move problem definition to the front of the model and add a separate step for refining the problem. Empathize goes between those two stages. So our model adds a stage:

Our Design Thinking Model



6 Steps to Success

It takes patience and practice to blend design thinking into our instructional design process. These six steps will help you get started the right way.

1. Get crystal clear on what problem you are trying to solve.

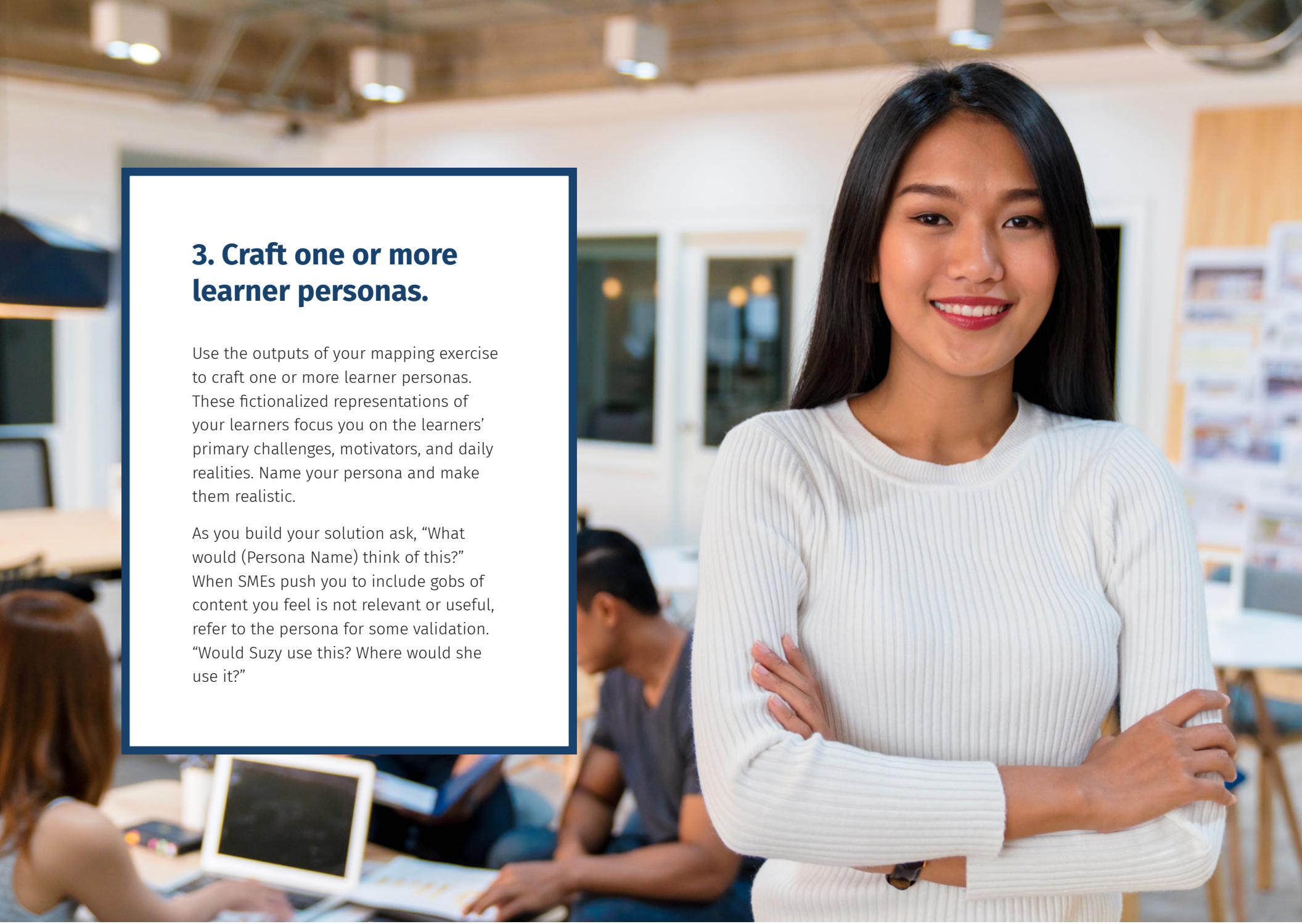
A simple “strategy blueprint” can help spark conversation about what challenges you’re trying to resolve, what constitutes success, and how you’ll measure achievement of success. If you need direction on how to put together a strategy blueprint, many online resources exist that can help you. Googling “strategy blueprints” gets you started.

As you execute on the other five tips below, refine your blueprint to keep it aligned with your users as well as the organization’s perspective.

2. Create an empathy map of your learner(s).

Your empathy map should focus on whatever task or block of knowledge you are trying to get people to do or know about. Numerous digital tools are available for creating empathy maps, including ones that enable people to collaborate virtually. A baseline map addresses questions in five areas:

1. What is this learner thinking and feeling about X? (X = whatever it is you want people to learn to do or to know about)
2. What does the learner see and hear from others as they do X or apply knowledge of X in their jobs?
3. What does the learner do in relation to X? (For example, if the training is going to focus on selling a product, ask yourself what the sales rep (the learner) does in the job as he/she sells a product.)
4. What are the learner's pain points in attempting to do the task/apply knowledge?
5. What are the motivators for doing the task/applying knowledge?



3. Craft one or more learner personas.

Use the outputs of your mapping exercise to craft one or more learner personas. These fictionalized representations of your learners focus you on the learners' primary challenges, motivators, and daily realities. Name your persona and make them realistic.

As you build your solution ask, "What would (Persona Name) think of this?" When SMEs push you to include gobs of content you feel is not relevant or useful, refer to the persona for some validation. "Would Suzy use this? Where would she use it?"

4. Recognize learning as a journey, not an event.

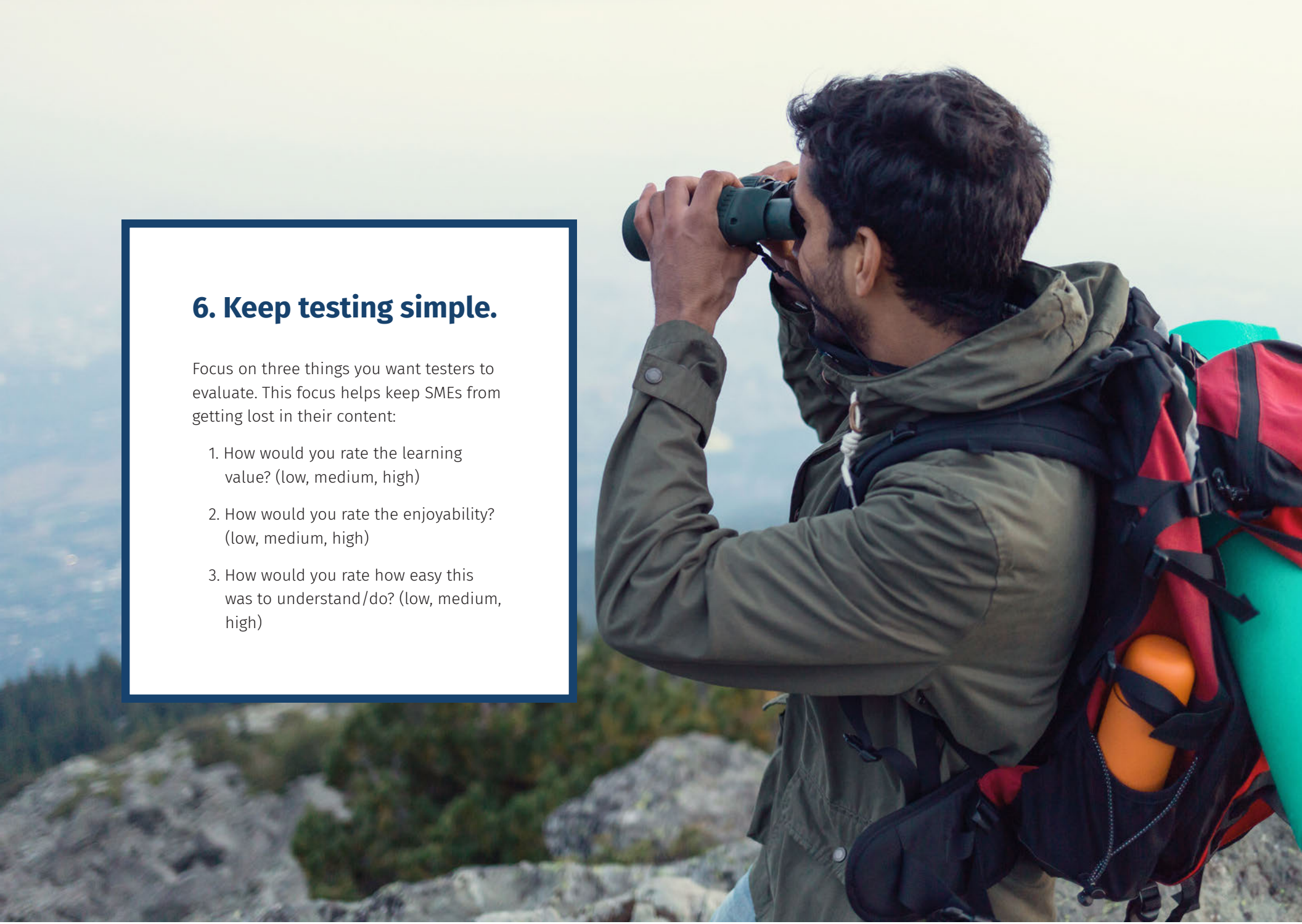
Use a learning journey map to discuss and plan the entire learning process. We have crafted and trademarked a learning journey that includes six steps that go from Step 1 “Notice” to Step 6 “Sustain.” Consciously connect what your empathy map has revealed about the learner with decisions about your solution. A journey map helps you specify these things:

- The key activity or activities the learner will do within a step.
- The emotions you want to elicit and the ones you want to avoid triggering.
- The desired outcome of a step so you can verify the activities support the outcome.
- Things that could make a step “magical” (perhaps by tapping into one of the learner’s motivators or eliminating a challenge they have).
- Things that can derail the journey and cause misery. (These opportunities for magic or misery can be found within the empathy map.)
- What the organization must do to support the activities, maximize the magic, and avoid the misery points.
- Organizational obstacles that can threaten success or make an activity hard to support.
- Opportunities to leverage based on empathic understanding of the user. (Opportunities often emerge as part of empathy mapping exercise.)

5. Brainstorm ideas for solving your problem. Create simple prototypes.

Brainstorm possible activities or solutions. Create low-fidelity prototypes of learning activities or tools, and let four to six target learners give you feedback on what's delightful about the experience and what stinks. Let learners (not just SMEs) suggest ways to improve it.

If you are designing a live workshop, your prototype may simply be a narrative outline of what the workshop will include and activities learners will do. If it's an eLearning course or digital experience, then prototype typical screens and key actions a user does within it. After you create your prototypes, get feedback on them. Your goal is to get feedback on your solutions from the learners rather than just building them and hoping for the best.



6. Keep testing simple.

Focus on three things you want testers to evaluate. This focus helps keep SMEs from getting lost in their content:

1. How would you rate the learning value? (low, medium, high)
2. How would you rate the enjoyability? (low, medium, high)
3. How would you rate how easy this was to understand/do? (low, medium, high)

Design Thinking Tools

Ready to start using design thinking? These five tools are essential to our process.

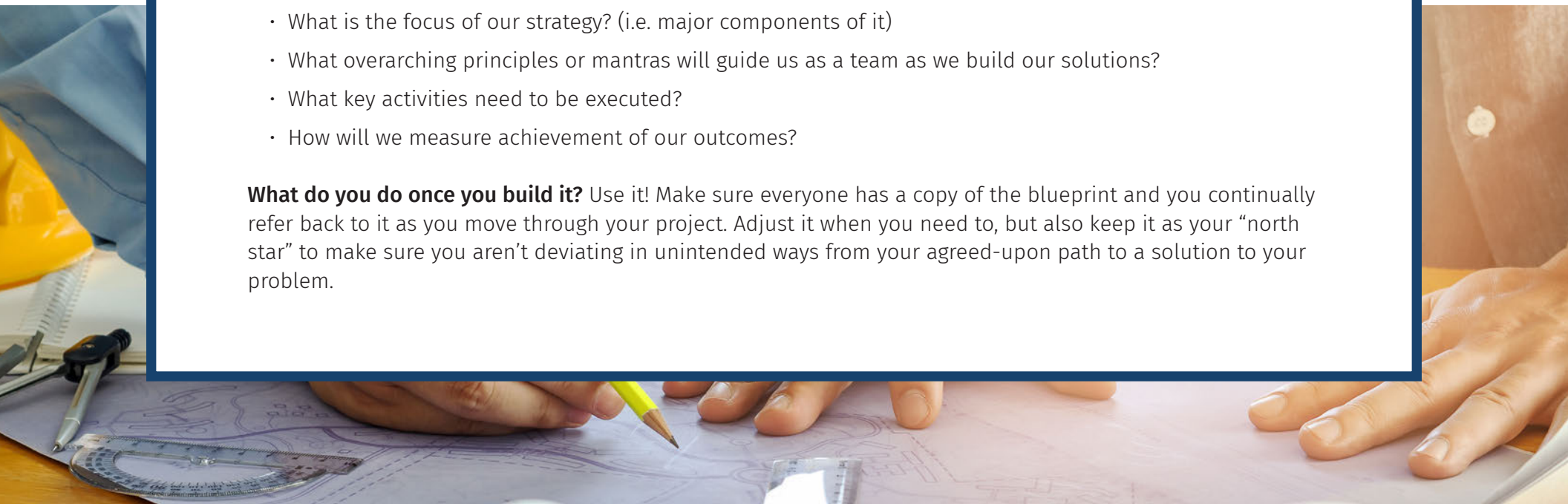
#1: Strategy Blueprint

What it is: Technically, a strategy blueprint is not a design thinking tool. It's a visualization tool that enables people to get a snapshot view of a problem and the solution to that problem.

How and when you use it: Introduce this tool when someone first approaches you about creating a learning solution. Ask them what they can share related to each section of the blueprint and document their responses. Pull the blueprint out again and again as you execute other stages in the design thinking process. See what needs to be adjusted in the focus and activity sections of the blueprint. Consider whether guiding principles need to be adjusted at all. Challenge your assumptions about what success looks like and verify you are measuring the right things. Make sure everyone stays in alignment on these six things throughout the project:

- What challenges or problems are we trying to solve? To do that, what obstacles do we need to overcome?
- What are the biggest desired outcomes? What does success look like?
- What is the focus of our strategy? (i.e. major components of it)
- What overarching principles or mantras will guide us as a team as we build our solutions?
- What key activities need to be executed?
- How will we measure achievement of our outcomes?

What do you do once you build it? Use it! Make sure everyone has a copy of the blueprint and you continually refer back to it as you move through your project. Adjust it when you need to, but also keep it as your "north star" to make sure you aren't deviating in unintended ways from your agreed-upon path to a solution to your problem.



Sample Strategy Blueprint

Challenges

What problems are we trying to solve, and what obstacles do we need to overcome?

- Learners are absent from design process; we don't know enough about them and their situations. Instead we rely on SMEs telling us about the learners.
- It can be difficult to get clients to define business outcomes – sometimes the problem (or opportunity) is not clearly defined.
- We have SMES driving design rather than learners; too much content going into solutions and struggle to get buy-in on reinforcement as well as need to plan out implementations.

Here is the strategy blueprint we are using to guide us as we implement design thinking at BLP.

Aspirations

What are the biggest desired outcomes? What does success look like?

- 100% of our designs consider all aspects of learning journey.
- 100% of our designs/ solutions created with input from learners.
- 100% of our designs have clearly defined business outcomes.
- Clients can share tangible, measurable results w/us that resulted from solution we helped create.

Focus Areas

What is the scope of the strategy? What will you focus on for the biggest impact?

- Knowledge and capacity building.
- Communication and knowledge sharing.
- Tool and process updates.
- Application w/in project work.

Guiding Principles

What mantras will guide the team's work?

- Learners matter. Organizational success is impossible w/out learner success.
- Design thinking requires partnership w/ the client.

Activities

What types of activities solve the problems?

- Education campaign: blog posts, knowledge sharing.
- Workshops and skill-builder activities for BLPers and clients: practice using the tools.
- Sr. ldrshp modeling the way; executing early efforts, coaching.
- Revision and updating of processes and toolbox of design tools.
- Application and reinforcement in client work: sharing success stories and "best practices."

Outcomes

What metrics gauge success?

- # of awards won
- Volume of repeat business that is rooted in satisfaction w/ both process and outcomes achieved

Your Strategy Blueprint

Challenges

What problems are we trying to solve, and what obstacles do we need to overcome?

Aspirations	Focus Areas	Guiding Principles	Activities
What are the biggest desired outcomes? What does success look like?	What is the scope of the strategy? What will you focus on for the biggest impact?	What mantras will guide the team's work?	What types of activities solve the problems?

Outcomes

What metrics gauge success?

#2: Learning Journey Map

What it is: A visualization of the "journey" people must travel to learn something AND transfer that learning into actions that produce business outcomes.

How and when you use it: We like to introduce a blank map during the design meeting to help customers understand that planning an event (an eLearning course or a workshop) will yield nothing in isolation. An entire journey needs to be crafted and much thought needs to be given to all steps and stages, not just to planning a course.

Use a learning journey map to discuss and plan every step that is part of the learning process. A learning journey can literally be mapped out using the journey map we provide – or the map can be a reference point for the design team to ensure their design incorporates and considers all steps in a journey.

What do you do once you build it? If you built an actual map as part of the design, then reference the map as you build. Verify that you have magical moments within it – and you've avoided creating miserable moments for learners. Compare your journey map to the persona and empathy maps you built. Does the journey address the pain points and the motivators? Does the journey map stay true to the strategy blueprint you crafted? Assess whether you successfully elicit the emotions and outcomes you are seeking for each step of the journey. If you have gaps, figure out what you need to include to close the gap.

The Learning Journey Map (Example)

	Phase	PREPARE		ACQUIRE KNOWLEDGE & SKILL	BUILD MEMORY & TRY USING ON THE JOB		MAINTAIN USE OVER TIME
Learner Perspective	Step	1. Notice	2. Commit	3. Learn & Practice	4. Repeat & Elaborate	5. Reflect & Explore	6. Sustain Over Long-term
	Actions	Read email	Block time on calendar; discuss with manager	Attend lectures, watch videos, read stuff, do quizzes and tests, listen to podcasts, play games, role play, do initial reflection, get initial feedback	Do additional practice – games, scenarios, simulation, OJP + feedback	Attempt to use skills/ knowledge, reflect on efforts, get coaching, find more resources and tools	Follow processes, align behavior to incentives, listen to and act on coaching, feedback
	Feelings	↑ Intrigued	↑ Motivated	↑ Curious, immersed	↑ Committed	↑ Confident	↑ Supported
		↓ Dismayed	↓ Resistant	↓ Bored, overwhelmed	↓ Disengaged	↓ Discouraged	↓ Cynical
	Desired Outcomes	Acceptance of need to learn	Willingness to make time to learn	Find relevance; gain belief in value	Remain committed; gain confidence	Decide to go deeper; learn more; share early successes	Perform at a high level; generate operational impact
	Magical Moments	"Meat cleaver on the hotel door."	"Oh - I can do this in 10-minute blocks."	This story is ME! / This activity is relevant AND lets me get peer-to-peer, real-world advice. / They are showing me how to do this in a real-world sales call where I have 30 seconds with customer.	Oh - wow. They have podcasts I can listen to while I'm driving that review this stuff.	My manager did a ride-along with me today; she gave me some great guidance on how I could be using the sales enablement stuff differently and invited me to share my success today during our upcoming regional meeting.	Wow! The results they are showcasing at our regional meeting are impressive. I guess my diligence in learning this stuff - and my manager's persistent reinforcement - were on target. My team's hitting its targets.
	Miserable Moments	Inability to even FIND email or to locate course(s) w/in an LMS system.	"There are 6 of these I have to do before the launch meeting?"	There is way too much content in here. It's unrealistic to learn all of this.	Where are those podcasts? I can't remember how to find them. I can't get them downloaded....	Where are those additional resource materials my manager told me about????	What? They are changing up the messaging? But we're just getting started with this new messaging.
TOUCHPOINTS		Email message	1:1 convo w/ mgr; reminders from LMS?	Training materials	Web mtg follow-ups; podcasts available for use during drive time.	Discussion w/mgr on early efforts to apply	Company communication of results of efforts and visible signs of stakeholder support.
Organization or Mgmt Perspective	Activities by Dept/ Role	Sales Mgr: Send email notification	LMS administrator: Load courses onto LMS; schedule training; prep for events; Mgr: adjust schedules to allow time for training. Avoid distracting during training.	Sales trainers: Execute training. Managers: attend and participate in training.	L&D dept: Ensure practice tools are in place; create auto reminders that encourage usage push out reminders and encouragements to use	Mgr: 1:1 ride-alongs; Marketing or L&D: sharing success stories and peer advice on addressing tough challenges (e.g., doc who is happy with competitor product)	Sales ldrship: Routine communication on status / success stories; commitment of resources; new or revamped process that align w/ desired behavior.
	Tensions or contradictions	Lack of clarity and good tools for communicating. No thought of how to market and build excitement for new training initiative.	Conflict between statements of importance of training AND push for reps to maximize selling time.	Lack of time to prep for ILT sessions; over-dependence on lecture/PPT. Heavy info volume and confusion over essential vs nonessential info to share	Time - confusion over whose role it is to push out info. Lack of clear post-training implementation support strategy	Making time for ride-alongs; having time to plot out how to coach and what to coach on	Saying stuff is important but not sharing out successes and business needs change rapidly.
	Opportunities to leverage	Evolve themed marketing campaign to make messages stand out as more memorable.	Consider time requirements and schedule blocks of time for reps - and PLAN for reinforcement and elaboration practice instead of just focusing on "learn" event.	Organize and design training to map to how actual sales calls go. Show how to execute when you have 30 seconds, 2 minutes, or 15-minute lunch and learn.	Drive time!!! Sales reps have lots of it; could podcasts be means	Showcase success stories and "how I did it" examples.	

Your Learning Journey Map

	Phase	PREPARE		ACQUIRE KNOWLEDGE & SKILL	BUILD MEMORY & TRY USING ON THE JOB		MAINTAIN USE OVER TIME
Learner Perspectice	Step	1. Notice	2. Commit	3. Learn & Practice	4. Repeat & Elaborate	5. Reflect & Explore	6. Sustain Over Long-term
	Actions						
	Feelings						
	Desired Outcomes	Acceptance of need to learn	Willingness to make time to learn	Find relevance; gain belief in value	Remain committed; gain confidence	Decide to go deeper; learn more; share early successes	Consistent, high-level performance; operational results (increased sales, decreased costs, increased brand awareness, decreased turnover, etc.)
	Magical Moments						
	Miserable Moments						
TOUCHPOINTS							
Organization or Mgmt Perspective	Activities by Dept/ Role						
	Tensions or contraditions						
	Opportunities to leverage						

#3: Empathy Map

What it is: A simple tool for helping people think about the users of your solution.

How and when you use it: Create an empathy map very early in your design process. The goal of the empathy map is to create empathy and shared understanding of the actual target user (instead of making assumptions). Make sure you gather people who truly represent your target users, and use the prompts on the map to guide them in brainstorming answers to each segment.

If you can do this as a live meeting, then draw a map on a flipchart or white board. If your users are virtual, an array of digital tools exist that enable people to collaborate virtually.

Focus your map on whatever task or block of knowledge you are trying to get people to do or know about. Context is helpful to get all respondees aligned – for example, "a new employee preparing for his/her first performance review" rather than "a new employee," or "the performance management process."

A baseline map addresses questions in six areas:

1. What is this learner thinking and feeling about X? (X = whatever it is you want people to learn to do or to know about)
2. What does the learner see while they do X? (For example, what is their environment like, what devices, tools, and resources are they using?)
3. What does the learner hear from others as they do X or apply knowledge of X in their jobs?
4. What does the learner say and do in relation to X? (For example, if the training is going to focus on selling a product, ask yourself what the sales rep (the learner) does on the job as he/she sells a product.)
5. What are the learner's pain points in attempting to do the task/applying knowledge?
6. What are the motivators for doing the task/applying knowledge successfully?

Keep in mind, you don't need to sit in a room and ask these questions to collect this information. A little old-fashioned observation goes a long way, and may provide insights into needs and wants that the users themselves aren't even aware of! For example, watching with fresh eyes may notice that the tools they need aren't easily accessible, or that the environment is not conducive to the task.

- Document all of their behaviors, even those that seem unrelated to the task. This may provide insight into the bigger picture of their environment.
- Capture quotes, especially those that explain why they do things the way they do. It can be really helpful to compare these quotes as you try to identify what makes exemplary performers different from average performers.
- Pay attention to all interactions with others as they complete the task. Are they positive or negative? Do they help or hinder progress on the task? Do some seem to stress them out more than others? Find out why.

What do you do once you build it? Use it! Create a persona based on the information you collect and use it to inform your learning journey map, your design, and what you develop. Also use it to assess your strategy blueprint or help you flesh that blueprint out in greater detail.

Sample Empathy Map

We generated this map for a pharmaceutical sales rep by working with a bona-fide sales rep. In this map, the key task is selling a new product that is launching into a market. We've highlighted a few of the key statements that we carried forward into the persona and into the design:

- Concerns about limited call time
- Need for practice time and reinforcement
- Ultimate goal: more prescriptions written, more sales commission

Think?

"How am I going to place new indications?"

"What's right for the patient?"

"How am I going to fit this new message into my call time?"

Feel?

Anxious and unconfident – "I don't know enough." "It's not clear to me how this fits. What if I say the wrong thing in the doc's office?

Excited – "Will this enable me to cover more indications and sell more scripts?

Overwhelmed – "I thought I understood this...but now I don't think I do."

See or Hear?

From docs – "It works the same as everything else." "I prescribe your competitor. Works fine, and I don't see why I should switch." "I don't prescribe any new drug for the first 2 years it's on the market. I want to wait and see how it does."

From other reps re: trng - "That was a total waste of time." "What just happened...I'm not sure I got it."

Do?

Sells on value if the product is innovative or different. Sells on reputation and org. reputation if can't really differentiate between their product and competitor products.

Focuses on what they CAN say, not what they can't.

Avoids selling a product if they don't understand it; relies on what they know/feel comfortable selling. Reverts back to old habits if attempts at selling new don't immediately pay off.

Pain/Challenges

Time it takes to really learn new stuff and time it takes to get comfortable with new messaging, tools, content.

Nerves: ride-alongs can be intimidating.

Lack of clarity on how to insert new messages into calls.

Motivators

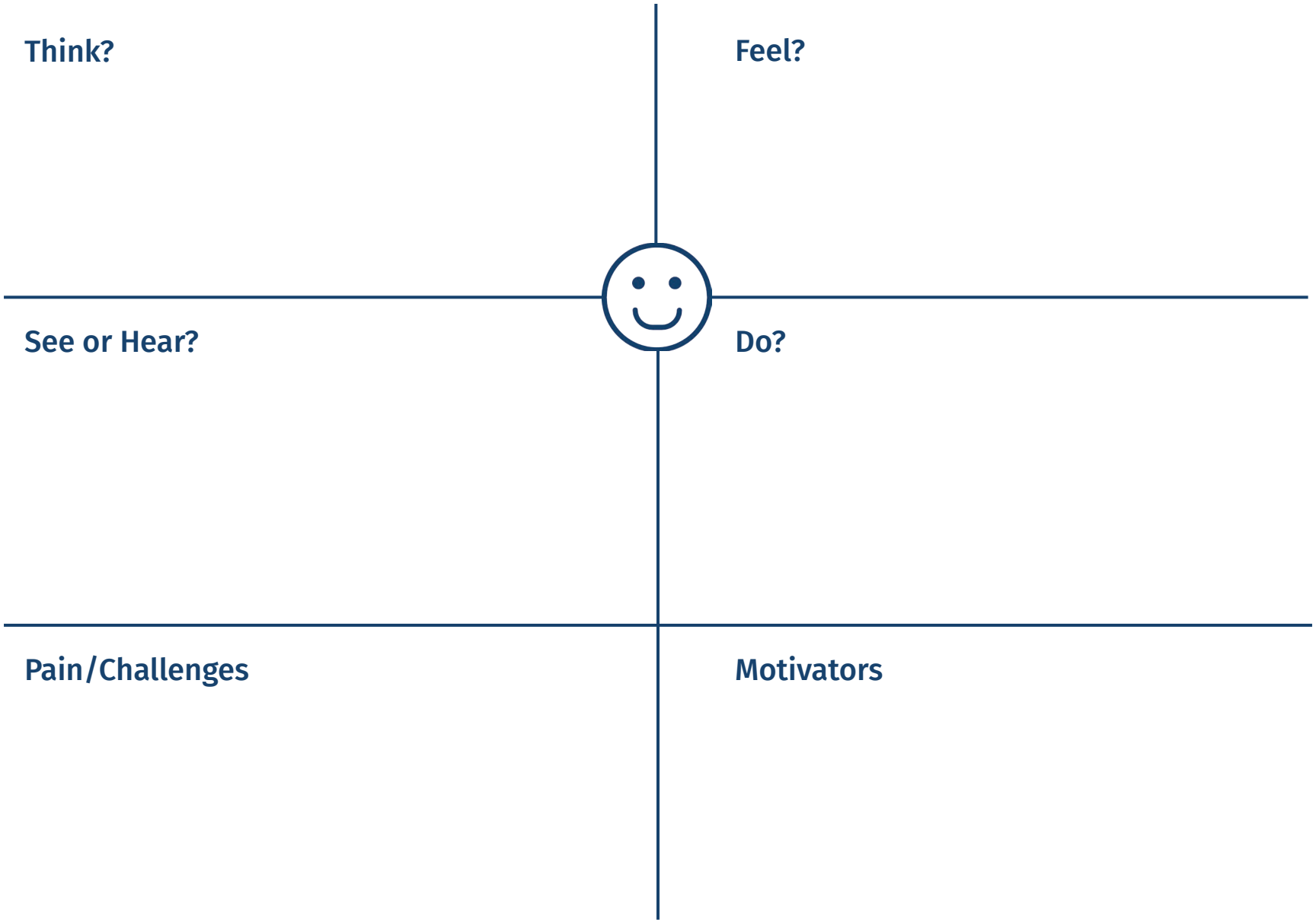
Get more scripts; earn more $$!

Gaining interest from docs; getting doc to try a drug on a patient.

Peer-to-peer interaction and story-sharing

Ride-alongs – incentive to prepare.

Your Empathy Map



#4: Learner Personas

What it is: A fictionalized character who embodies the traits of an entire learner group. You may have a single persona; you may need several, depending on how many unique learner segments you have.

How and when you use it: Craft your learner personas early in the design process. To build a strong persona, you need demographics about your user (age, gender, experience level with industry and company, etc.), a finished empathy map, a use case, and a context.

Personas help you keep the learner front and center in your thoughts as you make design decisions. Each design decision should reflect the persona's challenges, their motivators, and their daily realities as well as the needs of the business and any technology constraints the organization (or the individual learner) may have. Name your persona and be sure they are a realistic reflection of the key attributes you've discovered about your target learner.

What do you do once you build it? As you brainstorm design ideas – and execute development – continually ask yourself, "What would (INSERT PERSONA NAME) think of this?" When subject matter experts (SMEs) push you to include content you suspect is not relevant or useful, refer to the persona for validation. "How would Suzy use this? Where/When would she use it?". Keep the persona "alive" throughout the life of the project – make sure the user has a voice beyond the design phase.

Sample Learner Persona

We assembled this persona from our sample empathy map and an interview with another rep. You can see the connection to the empathy map information by the highlighted sections. We gathered additional information by mapping out call flows and discovering day-to-day realities from the rep.

Notice that the personal profile may be fictional, but it helps humanize the persona. You may find that you actually need more than one persona to represent your audience – for example, Tina has 10 years of experience; does she need different content/scenarios than an entry level rep?

We also mapped her sales call flow and asked about the devices she has available/uses most.

Studying a persona is like mining for design gold. These attributes can also be pulled into the learning journey to anticipate how to create magical moments/avoid miserable moments.

"Show me how to use info within a sales call. Give me reinforcement so I can build confidence."

Sales Call Realities

- Calls range in length from 30 seconds to 4 minutes for a standard call to 7 to 15 minutes of time for a lunch/learn event.
- Lunch events are hard-earned; many times people are primarily interested in free food.
- Figuring out how to incorporate new messaging into that tight call window is often hardest part of transferring training to the job.

Personal Profile

Tina is 39; she has 1 daughter and is constantly on-the-go between her job and her daughter's' activities.

She's been a sales rep for 10 years and has experience in several therapeutic areas. She's a seasoned pro and prides herself on hitting or exceeding goals while staying compliant. She doesn't want to be the one to lose respect with an HCP.

Challenges

- Getting it all done in a day.
- Figuring out how to incorporate "new" messaging into existing ones and staying within a 30-second call length.
- Building confidence after formal training on new messaging, product, clinical trial info, etc.

Values

- Having solutions to sell HCPs
- Being a credible voice to HCP
- Working for a company whose reputation is solid.
- Hitting her goals and maximizing income.

A Day in Her Life

Days are long. She's up at 6:00. The work day starts at 7:30; it may end around 10 p.m. when she wraps up emails, or inputting notes into Salesforce.

Her territory is large; she spends bulk of her day driving or standing in hallways waiting to see a doc. The total contact time she may have across 12 physicians (a typical call day) may only be 30 minutes' time.

Technology Realities

Tina is a utilitarian user of technology and not super tech-savvy. 90% of her time she works from her iPad. Her phone use is limited. She doesn't play computer games or video games. Her social media usage is limited to Facebook.

She relies on her tablet to display sales enablement pieces during conversations with docs.

She also still leaves behind a lot of print-based materials; some HCPs use tablets and laptops to search for info. Others rely on those print pieces or reprints of journal articles, studies, etc.

Journey Based on Persona

Values hitting her goals and maximizing income.

"Show me how to use info within a sales call."

"Give me reinforcement so I can build confidence." Big challenge builds confidence.

Notice	Commit	Learn & Practice	Repeat & Elaborate	Reflect & Explore	Sustain Long-term
Launch communication campaign: "How to win more scripts."	Ensure training descriptions are focused on how to use new messaging during sales calls.	Video demos: 30-sec, 2-min, 4-min, and 7-min calls. Gamified practice activity modeled after the sales call flow.	Video coaching tool for feedback on practice sales presentations. Podcasts to listen to during drive time.	Provide opportunities to share out success stories. Coaching guide for Sales Manager during ride-alongs.	Achieve sales goals for Product. (preceding steps work together to get you here)

Need help getting started?

We have a worksheet you can use to help you shape a persona. If the empathy map and our samples aren't enough, try filling the worksheet in and then shaping it into a persona that mirrors the samples we've included.

Click here to download the worksheet.

#5: Testing Tool

What it is: A simple matrix to keep reviewers focused on what really matters as they test prototypes, alphas, betas, and final versions of learning materials and solutions.

How and when you use it: Create and distribute a matrix to every reviewer on every deliverable. Ideally, limit the number of reviewers to 4 with 6 being the outside limit. Have all reviewers individually rate each significant component under review and provide verbal or written feedback to explain their ratings. This discussion guides the client and the design team in deciding what, if anything, needs to be adjusted and when “good enough” is achieved.

What do you do after you build it? Make decisions! Let the tool help you prioritize changes. If the tool is providing a “medium” enjoyable experience and high clarity and value, then don’t change it! Don’t let “perfect” be the enemy of “good.”

Testing Tool

In this example, we can see people are rating the experience as enjoyable, but indicating it has low value in helping them learn. That feedback is a red flag for you to attend to. You need to rework the activity to improve its learning value and increase its clarity. It may be that by improving clarity (people better understand what to do), the value improves as well.

Question	**Rate (INSERT ACTIVITY NAME) High/Medium/Low on these attributes. Explain your ratings.**		
	Enjoyable Experience	**Clarity - knew what to do**	**Value in helping me learn**
Tester 1	High	Medium	Low
Tester 2	HIgh	Medium	Low
Tester 3	High	Medium	Low
Tester 4	High	Medium	Low
Tester 5	High	Medium	Low

About Sharon Boller

Sharon Boller is CEO and president of Bottom-Line Performance (BLP), a learning solutions firm she founded in 1995. Sharon has grown BLP from a single-woman sole proprietorship to a $4M+ company with 36 team members. Under her direction, BLP created the Knowledge Guru learning game platform, which has received numerous industry awards, including a Brandon Hall 'Gold' Award for best innovation in gaming and technology (2014). Sharon is a frequent speaker at industry conferences and co-teaches learning game design workshops with Karl Kapp for ATD and eLearning Guild events. Sharon and Karl's new book, "Play to Learn: Everything You Need to Know About Designing Effective Learning Games," was released in Spring 2017 by ATD Press. Sharon earned an MS in Instructional Systems Technology from Indiana University.

About Laura Fletcher

Laura Fletcher is the Instructional Design Manager at Bottom-Line Performance, where she designs learning solutions and leads a team of talented instructional designers. Laura is passionate about training and development, and stays current on industry trends and best practices to design award-winning courses, curricula, and product launches for global clients. She has a M.Ed. in Human Resource Development from the University of Illinois.

About Bottom-Line Performance

Since 1995, **Bottom-Line Performance** has helped organizations create the right learning solution. Whether you have a complex problem to solve, product to launch, or process to implement, our in-house team partners with you every step of the way to design for your desired outcome and develop the right mix of tools: web and mobile apps, eLearning, serious games and gamification, video, and highly interactive instructor-led training to name a few. The end result? Award-winning solutions that solve problems, inspire people to act, and help people learn.

We are also the creators of Knowledge Guru®, a training reinforcement platform that uses adaptive learning, game-based learning, and microlearning to increase knowledge retention and improve performance.

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