



Virtual Training, SweetRush Style

5 Case Studies
to Inspire a Learner-Centered Approach

- 1 Rapid Development with NETEC
- 2 The Design Thinking Revolution with The NYSPCC and CoDesign
- 3 Diversity & Inclusion with UCSF
- 4 Creative Storytelling & Scenario-Based Learning with SHRM
- 5 Virtual Learning Journey with Pfizer

made with *love* by  SWEETRUSH

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Welcome. So Glad You're Here.

You've found your way to this eBook—and we're happy you did—so let's get straight to the point. **You're tasked with creating virtual training, and you want to hit it out of the park.**

You want learners to have a great experience, to retain what they learn, and to be motivated and prepared to apply what they learn. You want your leaders and stakeholders to be thrilled with your work. You want your learning program to meet its goals and positively impact your organization. And you want to be respected and excellent at your profession.

Maybe you've been creating virtual training for years. Maybe, since COVID-19, you're brand-new to this work. Or with the shift to remote work, you're accelerating the digital transformation of learning in your organization.

Perhaps you've had some success already, or you've struggled to get it right. Or perhaps it's a bit of both.

Our SweetRush team is here to meet you where you're at and inspire you with fresh ideas.

We've transformed many learning programs from live to virtual over the years, so we have a lot to share.



All the work we do is custom, and as a company we've focused on the integration of instructional design, visual design, and technology. In this eBook, you'll discover five stories of our work—unique challenges, audiences, and solutions to spark creative thought for your next virtual training program design.

And, as you'll see, we're all about learners. Not to the detriment of addressing business and organizational drivers and achieving ROI—on the contrary, a learner-centered approach is critical to meeting those goals.

When you step into learners' shoes, when you include the "why," when you speak to learners authentically, when you give them the opportunity to do and to reflect,* that's more than just creating training. You are designing a learning experience. Experiences have the power to change people. To change performance, behavior, hearts, and minds. To improve people's careers and lives.

* These happen to be four of the nine **SweetRush Design Truisms**, [which you can read more about here \(page 7\)](#).

Is that the reason you gravitated to this craft? Well, you're in good company with all of us here at SweetRush. Feel good about the work you do, and we hope we can contribute to your success.

Now that we know each other, let's get you into these case studies. You have the power! Pick the ones that interest you, and jump around at will.

How can I meet learners' needs in a rapid response situation? Discover the incredible work that the National Emerging Special Pathogen Training and Education Center (NETEC) is doing to educate frontline health care professionals about COVID-19. Learn how we collaborated to expand their capacity and rapidly develop custom training designed for this audience, and get some great tips for making rapid development succeed.



[Jump to Chapter 1](#)

How can I use design thinking to create learner-centric solutions? Explore how we adapted design thinking for designing L&D programs—we call it CoDesign—through the story of our partnership with the New York Society for the Prevention of Cruelty to Children (NYSPCC). Together, we are designing a learning program for youth gymnasts (three different age groups) on how to recognize and speak up about sexual abuse. We also share how we pivoted our own live CoDesign experience to a virtual one.



[Jump to Chapter 2](#)



How can I make virtual training more inclusive?

As L&D professionals, we should have diversity, equity, and inclusion at the forefront of our minds when designing and delivering virtual training. Find out how we supported the University of California at San Francisco Center for Excellence in Transgender Care in its mission to create safe spaces for transgender and non-binary folks in health care settings. And get insights and expertise about widening representation through the use of illustration, stock photography, and voice-over.



Jump to Chapter 3

How can I use storytelling and scenario-based learning to engage learners?

Six friends gather at a coffee shop...hold on, don't step away from this eBook and turn on Netflix. We've got a new, binge-worthy program for you, with a cast of friends to get to know and love. Discover SHRM People Manager Qualification (PMQ), a 10-hour virtual learning experience designed to upskill new people managers. Learn about the SHRM-SweetRush collaboration that produced a compelling, story- and character-driven learning program and assessment strategy.



Jump to Chapter 4

How do I reimagine virtual training through the lens of learner experience?

You know curriculum design. You know blended learning. Do you know about learning journeys—or, better yet, the learner's journey? Find out how Pfizer's Marketing Effectiveness team, partnering with SweetRush, created a multimodal virtual learner's journey to teach marketing leaders how to leverage their teams and connect with customers in the digital age. And discover how visual maps can be powerful tools to align and orient project teams, stakeholders, and learners.



Jump to Chapter 5

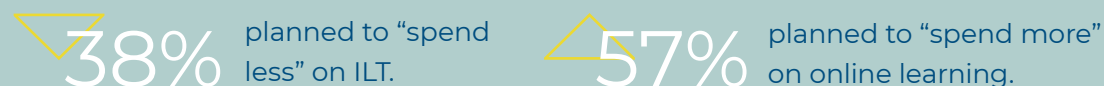
Enjoy!





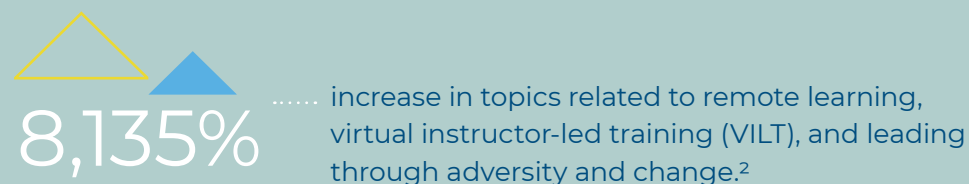
Digital Transformation: Already Happening, Accelerated by COVID-19

And at the start of the year, LinkedIn's 2020 Learning Report¹ confirmed the trend of ILT budgets decreasing and online learning budgets increasing.



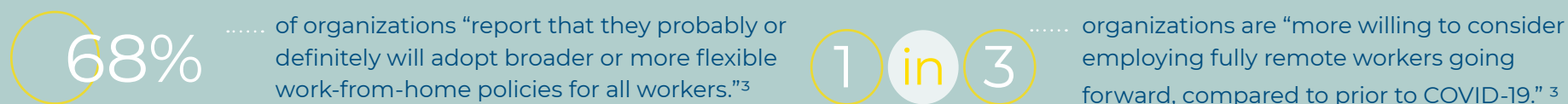
Coronavirus Pivot

In April, Training Industry reported an:



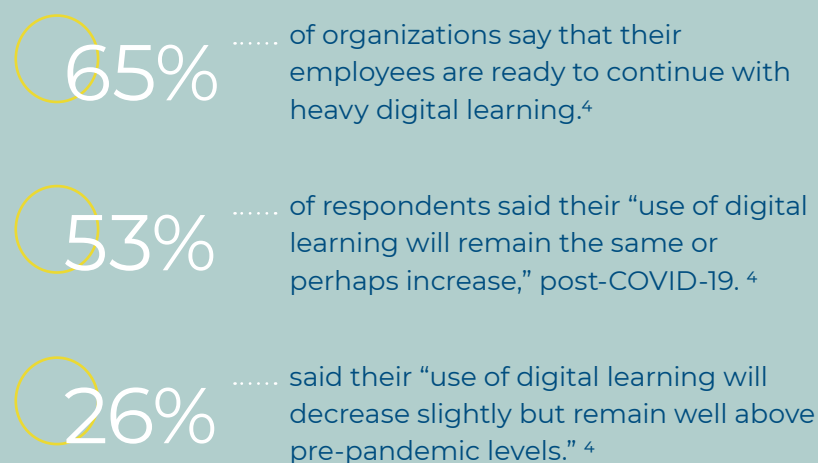
Remote Work—Not a Temporary Trend

A recent SHRM survey indicates that:



Remote Work—Not a Temporary Trend And Neither Is Digital Learning

Brandon Hall Group reports that:



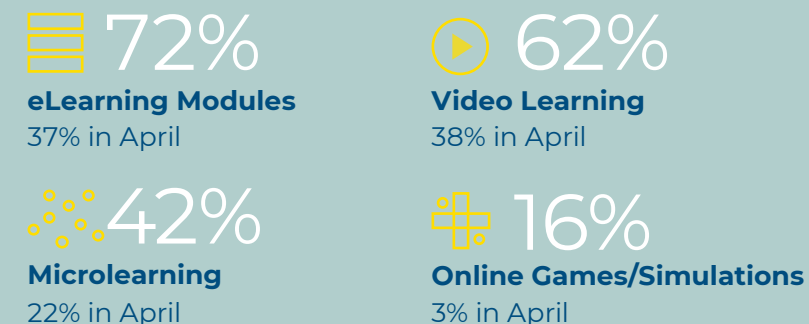
But Short-Term Solutions Won't Stay for the Long Term

In a comparison survey, Brandon Hall Group also showed that while VILT, webinars, and conference calls were go-to, short-term solutions in April, by June, eLearning, video learning, microlearning, and online games/simulations were gaining significantly in popularity.⁵

In April:



In June:



1. <https://learning.linkedin.com/content/dam/me/learning/resources/pdfs/LinkedIn-Learning-2020-Workplace-Learning-Report.pdf>
 2. <https://trainingindustry.com/articles/strategy-alignment-and-planning/navigating-the-corporate-training-market-during-the-covid-19-pandemic/>
 3. <https://www.shrm.org/hr-today/trends-and-forecasting/research-and-surveys/documents/for%20media%20shrm%20cv19%20return%20to%20work%20hr%20data%20v4.pdf>
 4. <https://go.brandonhall.com/l/8262/2020-06-29/b387rx>
 5. <https://go.brandonhall.com/l/8262/2020-06-29/b387rx>



SweetRush Design Truisms

SweetRush's Design Truisms are at the heart of everything we do. They are simple ideas with profound implications. Incorporate the Truisms into your work, and you will find that they continue speaking to you in new and deeper ways.

How to use them:

Stuck for an idea? Grab a Truism—any Truism—and use it to reflect on your challenges.

Reviewing your own or other's work? Use the Truisms as a framework for evaluation.

Is something only “pretty good”? Leverage a Truism to take it up a notch.



Step into Their Shoes

Clearly understanding your audience, stakeholders, and organizational needs enables you to identify people's challenges, as well as their hopes and dreams. With this insight, you can make good design decisions so the solution matches (and perhaps exceeds) the goals of the learner, leadership, and the organization as a whole.



Define Objectives, Create a Story

People are storytelling creatures by nature, and the use of narrative in learning draws on an instinctual love of stories to create compelling and memorable learning experiences. If we think about learning objectives as the bones of our story, then the story is the thing that brings these bones to life.



Include the “Why”

When adults understand how the learning will improve their lives, they will open their minds, become more engaged, and ultimately show willingness to try new skills and recall knowledge.



Create an Authentic Experience

Instruction is best anchored in the real-life experience of the learners. When your content and stories match their daily experiences, learners can bridge the gap between a digital experience and a true-to-life learning moment.



Show, Don't Tell

Everyone knows that a picture is worth a thousand words, but words can also be used effectively to “show” what is happening. No one wants to hear about the party, they want to be there. Put the learner in the middle of the action.



It's Good to Know and Better to Do

We acquire knowledge so we can take it into the world and do something with it. For most learners, the “doing” is the most interesting part. And it's this “doing” that leads to stronger memories, a mastery of skills, and, ideally, change.



Make the Learner's Journey Intuitive

Everything the learner encounters should feel natural and intuitive. This includes all components of the course, from the user interface, to how the content is sequenced and chunked, to how the content is laid out on the screen, to the overall user experience. If our learners have to stop and ask “What is happening?” or “Where am I?” or “How do I...?” then we've done something wrong.



Be Creative in Everything You Do, Everyone

Creativity is for everyone. A commitment to creativity requires a promise to keep pushing. It means summoning the courage to offer an “OK” suggestion, knowing that the processes of brainstorming and design will bring new life to ideas, elevating them from “OK” to “wow.” It is taking joy in the creative process itself, reveling in the excitement of the journey rather than focusing solely on the destination.



1

When Rapid Response Requires Rapid Development:

Using Virtual Training to Address a Critical, Life-and-Death Need



She rises at 5:15 a.m., arrives in the COVID-19 unit by 7:15. Receives the handoff information from the night shift. She washes down, dons the yellow gown, shoe covers, hair cover, the N95 mask, gloves, and the eye shield, and enters the negative pressure room.

Her distraught patient is coughing uncontrollably. She administers a breathing treatment along with some Tylenol and fluids, checks her oxygen saturation, delivers a message from her family, and reassures her that she will get better. She leaves and repeats the process with her next patient.

She does this for 12 hours. She goes home and disinfects before she greets her family, has some dinner, and goes to bed. Rises at 5:15 and repeats the process, trying not to be discouraged by the patients who go on ventilators or don't survive.

The nurses never say no, they are always there, eight, 12, sometimes 15 hours a day, and then they do it again the next day and the next. They are the front line.

—MICHAEL DEWAR, MD, FACS, FRCS (C)

ASSISTANT PROFESSOR OF CARDIAC SURGERY, YALE SCHOOL OF MEDICINE,
LETTERS TO THE EDITOR, NEW YORK TIMES⁶

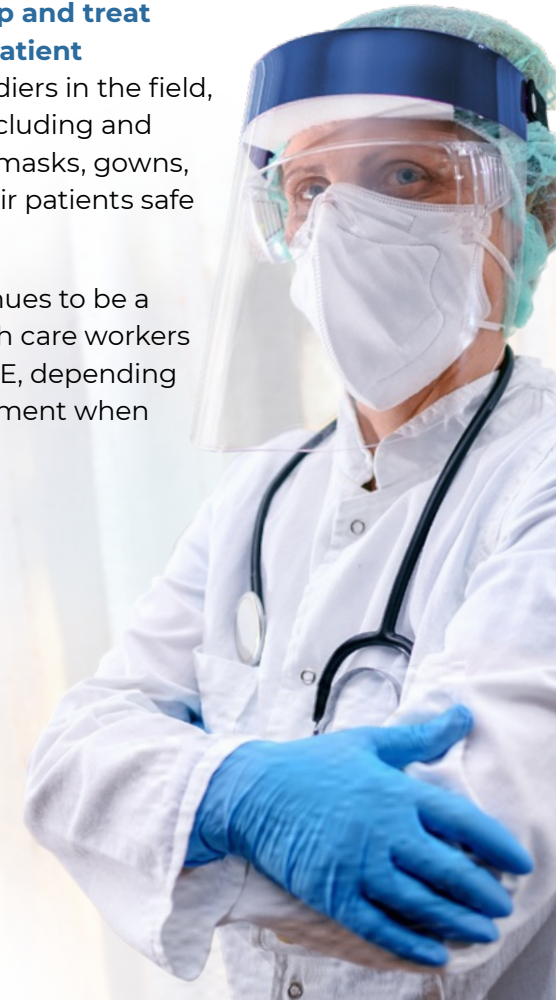
6. <https://www.nytimes.com/2020/03/26/opinion/letters/coronavirus-health-care.html>

In the war against COVID-19, our front line is our dedicated health care workers, who fight every day to help and treat their patients, and do their utmost to prevent patient casualties and stay alive in the process.

Like soldiers in the field, they need the right equipment to do their jobs, including and especially personal protective equipment (PPE)—masks, gowns, gloves, goggles, etc.—to keep themselves and their patients safe and prevent further spread of the virus.

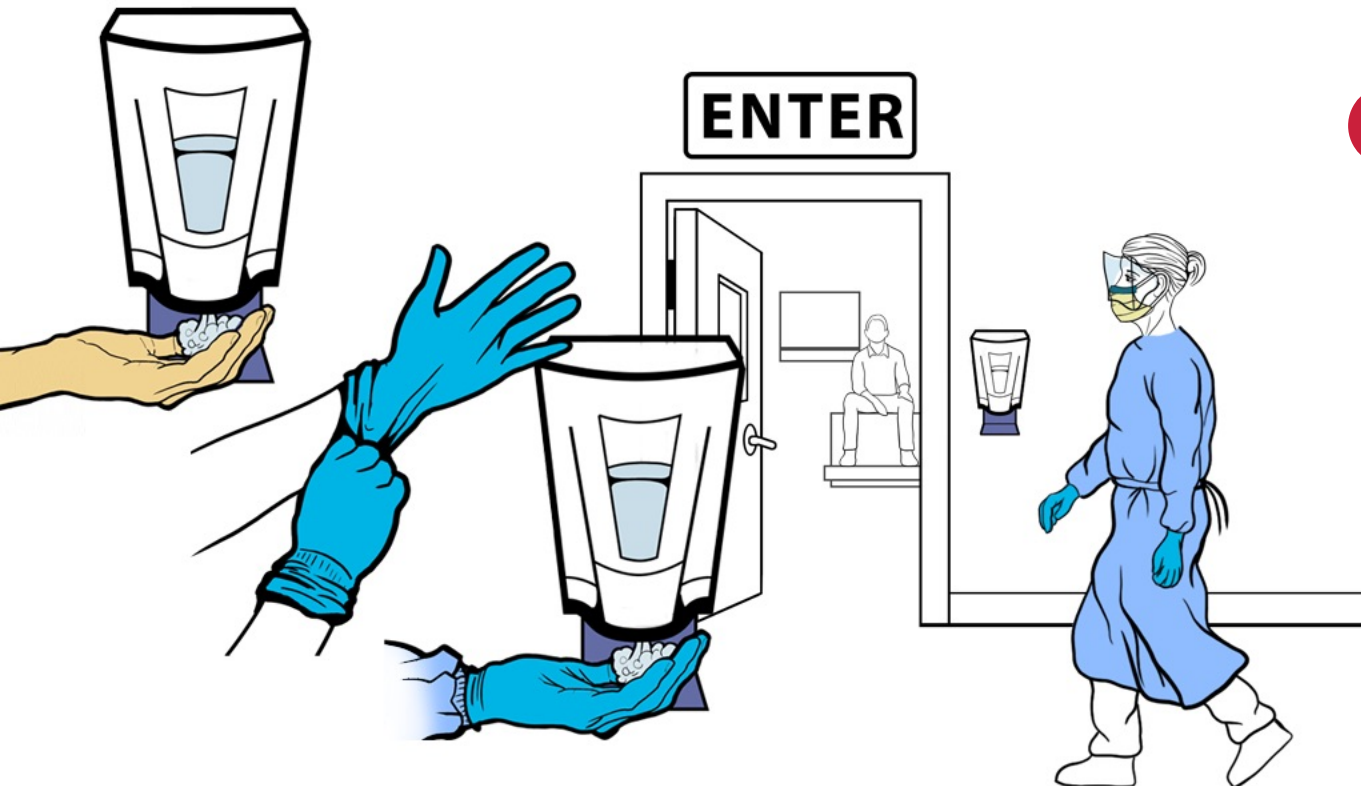
Getting access to appropriate and new PPE continues to be a challenge as the virus surges across the U.S. Health care workers need to use new varieties and combinations of PPE, depending on what's available, and disinfect and reuse equipment when supplies are low.

All of this represents a significant change in how they are used to working—in the midst of the highest-stress work environment you can imagine. **Health care workers have training on PPE, but now they need to be retrained to pause and consider what equipment they have.** Adding to the challenge, the U.S. Centers for Disease Control (CDC) continues to update PPE guidelines based on our evolving understanding of the virus and how it spreads. For these frontline workers, it's a challenging, stressful, ever-changing landscape, with life and death in the balance.





Point-of-need PPE education that can be tailored to the health care workers' environments and available equipment demonstrates how effective training resources can support workers and save lives. **The National Emerging Special Pathogen Training and Education Center (NETEC) has brilliantly stepped up to this challenge.** No stranger to deadly pathogens, NETEC led the American response to the Ebola crisis, giving them a firsthand perspective on the issues and needs related to highly communicable diseases in health care settings.



The dedicated professionals at NETEC are faculty and staff from Emory University, the University of Nebraska Medical Center/Nebraska Medicine, and the New York Health and Hospitals Corporation, Bellevue Hospital Center. **They are working to increase the capability of U.S. public health and health care systems to safely and effectively manage individuals with suspected and confirmed special pathogens—which has made them ready and able to make an impact on COVID-19.**

The team at NETEC was doing an incredible job with their available resources, but they needed help to produce more training, more quickly. And, as they shared, there couldn't be a stronger case and need for education and training.



As someone whose specialty lies at the intersection of critical care, infectious disease, and public health preparedness, I've trained intellectually for this moment for many years. But nothing could have emotionally prepared me for the things I've seen and experienced these last weeks; I have witnessed innumerable deaths in my career, but I've never watched this many relatively young, otherwise healthy people become this sick, this quickly, and die alone.⁷

—Joshua Allen, BSN, RN, CCRN

⁷ <https://www.ncbi.nlm.nih.gov/pmc/articles/PMC7275145/>



The SweetRush team was ready to get to work and do everything possible to support NETEC. “We heard NETEC, loud and clear,” says Sara Chapin, Program Manager for the NETEC project team at SweetRush. “We needed to help get this information out to decrease the risk of self-contamination and potentially save lives. The team really identified with that mission.”

The need was critical, and the mandate was clear: move quickly. As the NETEC and SweetRush teams moved rapidly through the stages of group development (forming, storming, norming, performing), they came to understand each others’ strengths and capabilities, growing into a trusted partnership. **At the same time, the SweetRush team worked diligently to adapt its standard production processes to be as nimble as possible in this time-pressured situation.**



NETEC initially came to us with a targeted need, which was to help them rapidly create additional learning assets, specifically targeting COVID-19-related topics for the medical community. NETEC has long created their own excellent informational materials. It was just the volume shift that inspired them to reach out to us. Then as NETEC members started to see our deliverables, they identified other opportunities for how SweetRush could support their work.

—Sara Chapin, SweetRush Program Manager

Let’s take a look at what we’ve created together to support this critical need.



Flexible, Stand-Alone, Visually-Driven Learning Assets

The NETEC team had already established a visual style and approach for learning assets, which enables quick and clear comprehension in a just-in-time learning environment. Emory School of Medicine's Visual Medical Education team contributed their illustrations as source material to help expedite development. SweetRush illustrators sought not to simply mimic the style, but see where they could build upon it.

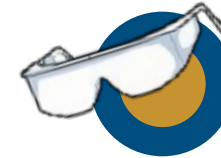
From the beginning, NETEC reinforced how essential accuracy was in the learning assets.

There was no room to improvise or create something that doesn't look like the real thing, because people's lives depend on how they use and sometimes reuse the protective equipment—how they clean their hands, etc. We needed to respect NETEC's approach and style.

—SweetRush Creative Director



GLOVES



EYE PROTECTION



AIRWAY PROTECTION



BODY PROTECTION

The assets are image-forward and infographic-centric. Taking complicated, life-saving information and boiling it down to an intuitive and accurate illustration poses an interesting challenge.

—Sara Chapin

The work involved everything from traditional PDFs, to animations, to eLearning courses. The audiences included frontline health care workers in many different settings, including hospitals and alternative care environments, such as assisted living facilities. Some learning assets are also being designed for the general public.

NETEC is generating resources on a significant breadth of topics, not just PPE. It is tackling multiple angles on the NETEC crisis, ranging from negative air pressure, to proning, to disinfecting, and even topics like mental health for the caregiver.

—Sara Chapin

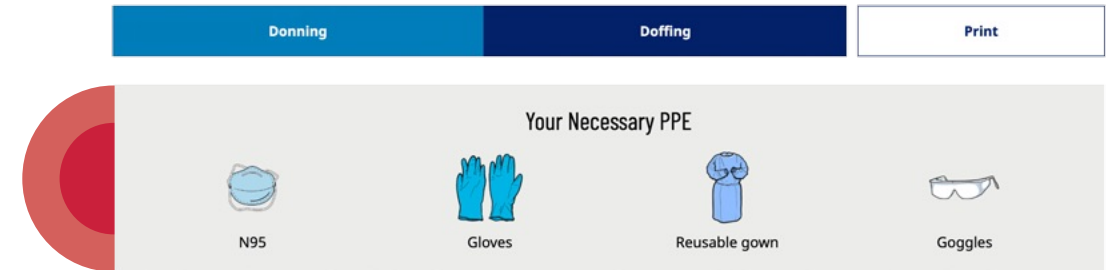
SweetRush worked with an impressive array of diverse SMEs, and we came to appreciate even more the complex situation health care workers are facing.



Web-Based Performance Support App

As suppliers struggle to meet a global surge in PPE demand, and as the CDC and WHO issue shifting PPE recommendations, even experienced frontline medical professionals face a new challenge—namely, how do they best protect themselves, given their particular situation?

Each type of equipment has its own best practice for how to don (put on) and doff (take off). Donning and doffing are extremely regimented to decrease self-contamination. And many professionals are forced to reuse what was once considered single-use PPE.



These professionals need just-in-time training resources that work within their environment. Asking them to learn, retain, and apply potentially shifting new protocols—in situations in which they are tired and stressed—doesn't meet them at their point of need.

Emory Medical School knew there was a better way to get the medical community and caregivers the right information for their specific situation—with a web-based application.

This app is tailored to support two primary audiences: those who are extremely familiar with PPE but need to be trained on new donning and doffing methods, and those who are not as conversant with PPE, such as people working in long-term care homes and social workers. App users then indicate what type of patient interaction is planned and what PPE is available to get personalized, step-by-step coaching.

—Sara Chapin

Welcome to Guide My PPE

Guide MY PPE is a tool that has been developed by the Emory University School of Medicine to provide you with up-to-date information and best practices on the selection and use of personal protective equipment (PPE) as well as conservation and reuse.

The app is being updated on a regular basis. The latest release date is shown at the top of this web page. Please check back often for updates.

Click the launch button to open Guide My PPE and find out more about:



Minimum PPE Required



Donning and Doffing



Do's and Don'ts



PPE Reuse

[Launch Guide My PPE](#)





The app acts as point-of-need learning and performance support.

- Learners can pull up the app on their phones in any environment.
- They use the filter mechanism in the app to indicate what type of PPE they have available and whether they are reusing.
- The app then provides detailed instructions—again, visually-driven—for donning and doffing. The order in which one performs these steps is critical.



It works for a variety of situations. One example is the person on a phone who's in a changing room and needs the information immediately. Another is a nurse shift manager; the app allows them to print out in large format. They can do this at the beginning of a shift based on what resources are in stock, and post the print-outs around the hospital. This ability to personalize learning in real time is the key.

—Sara Chapin

The simplicity of the front end belies what's under the hood: **NETEC and SweetRush collaborated on a 100-page storyboard and more than 400 image assets. There are 90 possible combinations of instructions showing learners how to safely don and doff the equipment they are wearing for that shift.** And that's just the first phase—there will be more PPE options and coaching sequences supported in planned future releases. The app was intentionally designed to be easily maintainable, allowing NETEC to adjust content as updated CDC guidelines emerge.





Virtual Training:

A Must-Have for the Need



Virtual training was essential to provide a rapid response to this critical need for several reasons.

Widely Distributed, Global Audience

COVID-19 is affecting every state, region, and territory within the U.S., which means a vast population of health care workers and caregivers are in need of accurate, effective learning materials to stay safe. The only feasible way to reach such a large, distributed audience is through a virtual solution.

In addition, the virus is affecting 213 countries and territories around the world. One channel that NETEC uses to distribute learning assets is social media, which makes them available globally.

Just-in-Time Training Needs

Health care workers and caregivers need training resources in real time—for example, before they walk into a patient's room—applicable and tailored to their unique circumstances. With so many possible combinations of PPE, and the changing guidelines, virtual training is the only sustainable way to provide up-to-date, effective information at the point of need.

Image-Driven Approach

Heavy use of visuals was essential to the solution—clear illustrations depicting the actions learners should take are the reference guide they need. Illustrations also offer complete control and the ability to modify and maintain in an environment of change (new equipment, new guidelines). Virtual platforms to distribute this information, including the web-based app and website hub, ensure that learners can access what they need, when they need it.



Rapid Development: Work Teams Can Be Proud Of

Developing learning assets for frontline caregivers during a global pandemic was a big responsibility that the team took very seriously. Accuracy and clarity was always the priority, followed by speed.

The fact that we could take this complex content and create engaging, effective materials for a wide range of audiences is a testament to our great working collaboration with NETEC, to their impressive experts, and to our team.

—Sara Chapin, SweetRush Program Manager





INSIGHT

Making Rapid Development Work

Ever hear of the Iron Triangle? Fast, good, cheap—pick two.

The challenge of rapid development is that we want all three: a fast response to a critical need, an effective learning solution, all at a reasonable price.

So, how do you make rapid development work and solve the Iron Triangle? It's a challenge that we at SweetRush have been working on for years. Here's our take on what you need for successful rapid development:

► **Set strict guidelines for scope—and know where and when you can be flexible.**

Rapid development projects need a “box.” You can still make very effective training, but you'll need to put limits on complexity and interactivity. Define an approach that's feasible for the timeline and stick to it.

That said, for larger projects with lots of moving parts, such as our work with NETEC, everyone needs to remain flexible as the scope is evolving over time. Finding this balance falls into the arts/science category and realistically just takes experience.



► **Content readiness is king. Content stability is queen.**

Rapid development means hitting the ground running; there's no time for wading through out-of-date content, extensive SME interviews, or hunting down content updates and approvals.

Our work with NETEC was clearly an exception to this rule, given the nature of the pandemic situation and new research coming to light.

"In one case, we created a PDF about symptoms of the disease, and we changed it many times—there were new symptoms or some that needed to be removed. We all understood it was the nature of the situation.

—SweetRush Creative Director

Rapid development can work if all parties understand the expectations, and yet there is an understanding and a process to provide the needed amount of flexibility the team needs to respond to the client's iterative change requests.

► **Choose your tool.**

We regularly use all of the popular authoring tools (and some of the not-so-popular ones), and we've even built our own—twice. For rapid development, we are finding Articulate Rise to be an excellent choice.

► **Assign great people who take ownership.**

Since rapid development projects often have limitations on complexity and interactivity, you may think you can assign a more junior team. Not so fast. You'll want known players who can be counted on to produce great work and, importantly, take ownership.

"Thankfully our illustrators were capable of replicating the style quickly, and the same was true with graphic design. Illustration and graphic design is a core strength of ours, and it's just critically important to know you've assigned people who can accomplish the mission—and from our experience, junior talent will not get you excellent results quickly.

—SweetRush Creative Director

"In the case of rapid development, we give our instructional designers oversight of the deliverables from start to finish, which eliminates a lot of back and forth and hand-holding. This is different from a regular process in which a production manager will shepherd a deliverable along the steps.

—SweetRush Project Manager





► Eliminate the middleman.

In our rapid development projects, we vastly reduce the producer's role and even remove our bug tracking system from the equation. Instructional designers and graphic designers communicate directly and often, making changes to the course in Rise as they go.

"For the NETEC work, everyone understood we were in a big rush. We would throw five deliverables at a team member. They would jump on them and start sending them back as soon as they were finished. There were no deadlines needed. The level of commitment was so high that no one could ignore what they had on their plates."

—SweetRush Project Manager

► Be hyper-organized.

For larger projects, develop a simple tracking system that can give you a high-level status on every component at a glance. Make sure it can be easily, frequently, and rapidly updated; this will allow you to identify issues and make quick pivots.

"We created an internal structure for the design work that allowed us to easily grab parts and recycle things, in order to deliver with increased efficiency and speed."

—SweetRush Creative Director

► Stand up!

The process we use for rapid development is not "Agile" per se, but we've been inspired by and have borrowed certain features of Agile and iterative development methodologies. One of these is the "stand up"—a quick meeting, often daily, with team members to identify bottlenecks and quickly solve problems.

"Rather than having a single stand up, in which people had to wait to hear about their part of the project, we held specialized stand ups per NETEC work stream. Meetings were lean, targeted, and efficient."

—Sara Chapin, SweetRush Program Manager

► Resource in sprints.

For larger projects, identify resources needed on a weekly basis as opposed to longer durations, even if the project is expected to run several months or more.

► Eliminate phases.

Content stable? (Of course, you read the second bullet, right?) Go directly from detailed design or outline to content development inside your authoring tool, skipping the storyboard phase.



Key Takeaways

- 1 Life-and-death needs require a rapid response; **it was easy to have the team believe in the mission and give their all to ensure the program succeeds.** Most rapid development we take on does not have life and death hanging in the balance, but the team knows it is an important service, and they still need to, and do, rally behind the mission.
- 2 Just-in-time training + widely distributed audience + changing guidelines = virtual training. **Virtual training offered maintainability, scalability, and sustainability for a critical need.**
- 3 **Remember the king and queen of rapid development: content readiness and content stability.** If you need to hit a certain deadline, unavailable and unapproved content is not your friend.
- 4 Content, tools, and processes are important, but effective rapid development comes down to your team. **Partnership and ownership are the essential ingredients for success.**

Accelerate Your Impact

with SweetRush Team
or Staff Augmentation Support

We're proud to be recognized by our peers in the industry.



92 Brandon Hall Group Awards
2017-2020

eLearning Industry
#1 Virtual Training

5 Chief Learning Officer
Learning in Practice Awards

eLearning Industry
Top Rapid eLearning Providers

Learning & Performance Institute
Gold Learning Provider of the Year

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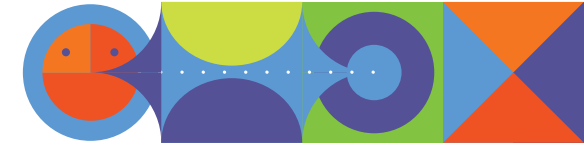
SWEETRUSH



2

The Design Thinking Revolution

How a New Design Process Can Create Learner-Centric Virtual Training



I think of the young girl that I was, and the little girls and young women all of these survivors were, every day. I feel like I see them in the faces of my two precious daughters. When I watch my daughters' eyes light up as they dance to The Nutcracker, I remember the little girl that I and all of these women used to be. The sparkle their eyes must have had as mine did before their innocence was taken. I watched my daughters love and trust unreservedly, and I remember the long road that it has been to let myself love and be loved without fear. I think of the scars that still remain for all of us.

—RACHEL DENHOLLANDER

FROM HER VICTIM STATEMENT, READ AT THE SENTENCING OF LARRY NASSAR⁸



The case and trial of Larry Nassar, the former USA Gymnastics national team doctor accused of assaulting at least 250 young women and girls, shocked each and every one of us. One hundred fifty-six women confronted Nassar during his sentencing, describing the horrific pain and suffering his actions caused. And while that case made world headlines, the problem is larger than Nassar.

Established in 1875 as the first child protection agency in the world, the New York Society for the Prevention of Cruelty to Children (The NYSPCC) is on a mission to make all children safe from abuse and neglect. The NYSPCC, in partnership with the Athlete Assistance Fund (AAF), is now helping to educate children in youth gymnastics on how to recognize and speak up about sexual abuse and grooming.

This work is right in the agency's wheelhouse. To respond to the complex needs of abused and neglected children—and those involved in their care—The NYSPCC provides counseling, legal, and educational services. Over the past 144 years, the agency has served more than two million children.

In fact, The NYSPCC already had a sexual abuse prevention program that they brought to K-12 classrooms all over New York State. **With an incredible team of subject matter experts and educators, and vast experience in the topic area, they were ready to make a difference in youth gymnastics, starting with a pilot in New York.**

What they needed was a partner to help bring this education to life as virtual training. When SweetRush got the call, you'd better believe we were ready and eager to join The NYSPCC on this mission.

8. <https://edition.cnn.com/2018/01/24/us/rachael-denhollander-full-statement/index.html>



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Enter SweetRush CoDesign™

Design Thinking for Learning and Development



CODESIGN™

made with *love* by you and  SWEETRUSH

We were bringing together two areas of expertise: The NYSPCC's deep expertise in providing children with what they need to prevent and report abuse, and the SweetRush expertise in creating award-winning digital learning. Working collaboratively from day one was essential. **Together, The NYSPCC and SweetRush team needed to question and validate assumptions.** And user testing would be a vital part of the process, to ensure the proposed solutions worked for the target audiences—three different age groups: grades K–3, 4–6, and 7–12.

Design thinking offers a methodology to do all that and more. And SweetRush has adapted the process to be specifically applicable to the design of learning and development solutions—we call it CoDesign.

Plans were made to get together in New York and spend an intense several days designing the program, and then COVID-19 hit. The entire process needed to pivot—now the collaboration needed to be done virtually.

As an entirely virtual company for 10 years, SweetRush was ready to make the pivot to virtual CoDesign.

Read about [how we made this happen](#).

Who's Invited to CoDesign?



The design thinking experience is most successful when all parties are at the table to participate in all five steps. This embraces the input of all: L&D and/or HR professionals, stakeholders, SMEs, the vendor-partner team, and—importantly—target learners. We try to get a representative cross section of learners; learning programs often have broad audiences with various, complex demographics.

SweetRush's CoDesign experience is led by a master facilitator. The project team leads are all in attendance—Solution Architect, Project Manager, Creative Director, Lead Instructional Designer, and possibly a Lead Engineer, depending on the nature of the project. As you'll see, in virtual CoDesign, this team plays an important role in the Sketch phase by collaborating on a prototype.

With CoDesign, we have all the right parties in the virtual “room” to create the best possible learning solution design. [Check out The Benefits of CoDesign to learn more.](#)

The Benefits of CoDesign



► Solutions with CoDesign are stronger.

We gain a deep understanding of the constraints and requirements, so our solutions are aligned with learner and business needs. One ID shared: “When we helped the client think through their audience needs, it became clear that they needed something beyond eLearning to solve their problem. In the end, we might only produce the eLearning, but they understand the support pieces they need to implement for true success.”

► Teams with CoDesign are stronger.

The immersive, intensive, collaborative experience deeply bonds the team. One Solution Architect shared: “I’ve seen a significant reduction in escalations in projects that begin with CoDesign. I’ve seen past struggles to align stakeholders and the project team, and to adapt the solution as more information becomes available. The CoDesign experience mitigates those risks!”

► Projects that begin with CoDesign are faster.

On average, CoDesign reduces project duration by 34 business days! One ID shared: “It takes considerably less time to develop a Solution Blueprint after CoDesign, and I am much more confident in the work.”

► Solutions are learner-centric.

In CoDesign, learners are front-and-center during the process. We are frequently surprised that their needs and experiences vary dramatically from what the stakeholders had imagined. For example, we had a stakeholder suggest that the learners, recent college graduates, desired a technology-rich learning solution with VR and apps. When interviewed, learners pleaded with us for a low-tech, slower-paced solution; the volume of information they were required to absorb was overwhelming. Together we created a solution with a lighter cognitive load.



of our clients say they'd **recommend CoDesign** to others.



And, seeing the positive outcomes for our clients, SweetRush has embraced **CoDesign for solving our own internal challenges as well.**



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Let's explore the **five steps of SweetRush's CoDesign process** and how each was applied to this challenge.

**1. Connect***Deep Understanding***2. Define****3. Play****4. Sketch***Ideation***5. Align** **Solution
Blueprint**

The five steps of CoDesign (**Connect, Define, Play, Sketch, and Align**) are designed to first gain a deep understanding of the audience, and then facilitate collaboration and ideation of great ideas. Our solution is validated and tested, and the end result is a Solution Blueprint detailing the path forward.



Connect

Building Empathy with Learners

With design thinking, the outcome we're looking for is to design learner-centric training that gets that audience excited about learning. Empathy is key—we need to deeply understand our learners in order to design effective learning solutions for them.

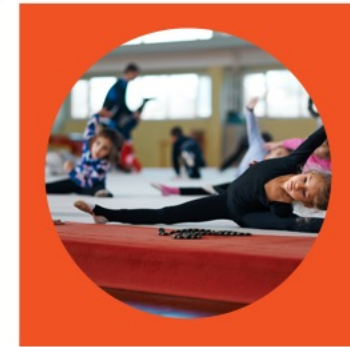
Typically in CoDesign, we will ask our client to invite learners to participate in the entire CoDesign process—during the first step, they will open up about themselves and we will explore how they like to learn. But given the subject matter and age groups involved, that wasn't possible. It was a real challenge to overcome.

The team came together with their areas of expertise. The NYSPCC team brought their deep expertise from teaching in the classroom, and SweetRush brought research and expertise in digital learning and entertainment preferences and behaviors for the different age groups.

Three Age Groups



K-3



4-6



7-12

Together, the team validated assumptions and made sure they were speaking at the right level for each set of kids. This work yielded lots of insights that positively impacted the course design.



From my experience with publishing and writing for children, I knew that kids ages 8-12 are known to be completionists. If you look at book series for that age group, you'll often see a checklist in the back to collect all the books. There's no linear progression to the books, in terms of the story; the publisher knows kids like to collect all of the books. We talked about these kinds of preferences and how to bring them into the solution design.

—Rafi Mittlefehldt, SweetRush Instructional Designer



A disturbing statistic that The NYSPCC team shared is that one in five kids will have experienced some kind of sexual exploitation or abuse situation by the time they are 18. Tough to process, but important for learner empathy: those same kids will be part of the audience taking this educational program.

We realized it was very important that we not put the learner in the story. Normally, we might consider having the action happen from a firsthand perspective, but in this case, we're going to have potentially sensitive scenarios, so the learner needs to be apart from it. Instead, they'll be watching and taking action in other ways.

—Rafi Mittlefehldt, SweetRush Instructional Designer

So that younger kids stay engaged, they get to create their own avatar within the course. But they are well outside the story when they are completing different activities, and not in the scenario itself.

Empathy-building and research also influenced the language used in the program.

Rather than have the learner “earn” anything, we talk about how they are “unleashing powers” they already have within themselves. They don’t “earn” the ability to speak up about sexual abuse; they unleash a power that was always within them. It’s just a small language tweak, but this level of attention to detail is important for these types of projects.

—SweetRush Solution Architect

Empathy-Building Design Thinking Activities

The Connect phase of CoDesign is always full of interesting insights and revelations. Here are some activities that can bring out the details you need to know:

▶ Talk show interviews:

Invite three or four learners “on stage” to be interviewed by an experienced Facilitator or Lead Instructional Designer. Ask open-ended questions. To be a real empath, ask your first question and just wait—no follow-up or comment. Just wait, and your learner may give you a subtler, more nuanced response.

▶ Love letters and break-up letters:

If you’re approaching a redesign, ask learners who have been through the program to write love letters and break-up letters about it. It’s a creative exercise that will unearth what to keep and what to change.

▶ Empathy walk-throughs:

Have learners record and talk through an experience that relates to what you want to teach them. This could be how they use a piece of software or the steps they go through during a customer interaction. Give them flexibility with how they share—their creativity, humor, and passion will help you connect with them more deeply.

If you’re up for some lighthearted but insightful fun, check out this “Dear Diary” account of a game-loving call center associate who participates in CoDesign.



Define

Identifying Constraints and Anticipating Roadblocks

Continuing to build deep understanding, during the Define stage, the team dug into two key activities: Build the Box and Kill the Program.



Build the Box

In this activity, the team defines the boundaries—the “must-haves”—of the program. The exercise illuminates all of the perceived constraints, and asks stakeholders to think about and consider each one generated by the large group and decide which are truly must-haves vs. nice-to-haves.

Some of the key findings from Build the Box that ultimately influenced the design included:

- ▶ **The need for scalability.** The initial need and program focuses on New York State and youth gymnastics, but the hope is that the program will extend beyond New York to a national program, and even extend beyond gymnastics. With this understanding, later in the process, the team began to create a story with layers that can be peeled away or changed for different audiences.
- ▶ **Reality of experience with abuse for some learners.** As mentioned, some learners may have already experienced abuse. Additionally, the majority of learners will engage with the program in the home, and the abuser could be in the home. These were important considerations for the storyline and the learner’s role in the program.
- ▶ **Technical requirements for an external audience.** Rather than a corporate or organizational audience with a limited set of approved devices, this audience will have a wider variety of devices and platforms. This impacts screen size and QA needs. During this step, the team also defined the authoring tool and LMS needs and specifications.



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Kill the Program

This activity asks participants:

Let's say you had an ideal program design.
What environmental factors could derail it?

Kill the Program is not about the learning program itself but about the environment in which it will live.

"Kill the Program gives the team—and especially stakeholders—an opportunity to step back and consider what things they need to do to ensure the soil is rich for planting the program. Some things are clearly in their control; some they can influence but may take more time. Others are outside their control entirely—labeling these can be a useful exercise to release emotional energy the team may be spending worrying about them.

—Lauren Granahan, SweetRush Director of Organizational Effectiveness and CoDesign Master Facilitator

Lack of support from gyms or parents came to light as an environmental risk factor, but one that could be influenced through the program design. Parents in particular are a key player in making sure that kids are able to access the training and encouraging them to complete it. The program design would need to embrace and motivate parents to take this role.

Other environmental factors not under The NYSPCC's control or influence included gyms going out of business due to COVID-19 and funding cuts.



Why Virtual Training?

The NYSPCC faced a classic learning and development challenge: **they knew how to educate children about this topic in the classroom, but they needed to extend their reach beyond the classroom, even independent of this COVID-19 moment.** While gymnastics can be a school-sponsored or club-level sport, many coaches and gyms operate and/or are physically located outside of the school system. Ultimately, in order to reach the 600,000 kids who participate in youth gymnastics in the U.S.,⁹ The NYSPCC recognized the solution for access and sustainability was online training.

9. <https://www.familyeducation.com/life/gymnastics/gymnastics-right-your-child>



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Play Dreaming Up (and Poking Holes) a Solution Design

When you're selecting a vendor to partner with in creating a learning program, the traditional sales cycle is a competitive process. Multiple vendors have a limited amount of time to deliver what they believe to be the right/winning solution. However, that solution is based on limited information and, typically, without the possibility of engaging with actual learners.

For The NYSPCC gymnasts sexual abuse prevention program, we did need to participate in a competitive Request for Proposal (RFP) process. And happily, The NYSPCC team was excited about the proposal SweetRush delivered (and SweetRush was pretty stoked on the ideas, too). But we also felt, collectively, that design thinking would ultimately help us arrive at an even better solution.



Design thinking works best when we remain open to all possible ideas. As a team, we decided to start with the ideas we initially proposed, but also recognize that they could be improved upon. Our job was to start to break it apart and figure out how to make it better. It was a great first step for this learning program, because we had multiple audiences due to the different age groups. So we broke into groups focusing on each age group.

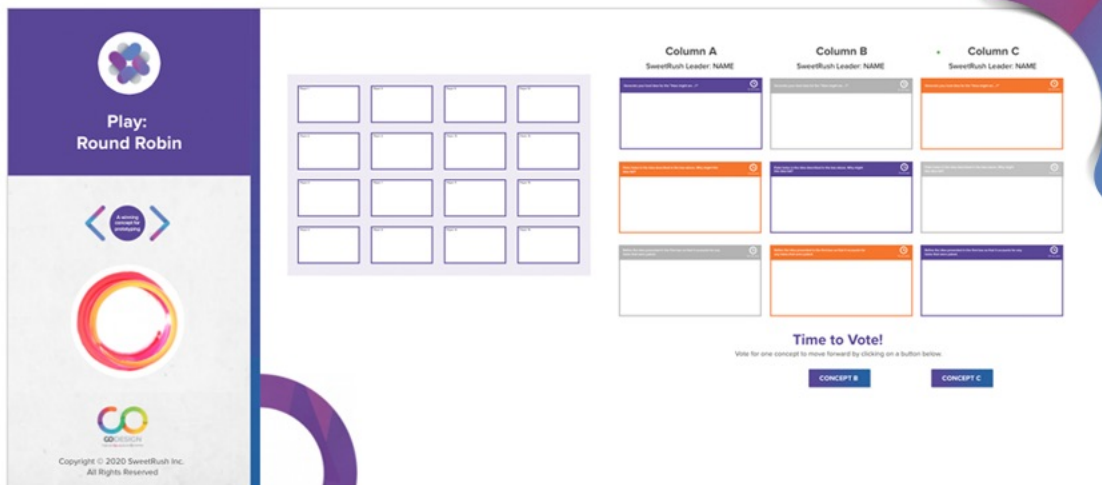
—Lauren Granahan

Using the “Round Robin” activity, each group poked holes in the proposal they were given for a specific age group, then passed it to the next group, who then refined the solution to address the “hole pokes” and improve the design.



The hole-poking was informed by what the team learned in the Connect and Define stages. With the information gained through deep understanding, we can make design decisions that are more aligned to the actual needs of the learners and the project.

—Lauren Granahan



The Creative Ecosystem

Ever been in a collaborative setting and felt like you were talking too much or too little? Or that your ideas were not coming fast enough—or they were coming fast and furious? **We all have innate ways we tend to collaborate. What's important to know is that being fast or slow, or talkative or reserved, doesn't impact the quality of your ideas.**

So how do we give each other the right time and space to contribute during CoDesign? That's where the SweetRush Creative Ecosystem comes in.

In this activity, individuals identify and share their collaboration “creative creature.” The graphic below illustrates our four creativity creatures. We ask everyone to first think about how quickly they generate ideas (that's the X-axis). Then, we ask them to think about how bold they are at sharing ideas (the Y-axis). If they identify as a fast idea-generator and a cautious sharer, their creativity animal is the cheetah. A slow idea-generator and bold sharer is the seahorse.

Participants get excited about naming their “creative creature” and referring to it during collaboration (“*Just give me a second, you know I’m a seahorse!*”). It becomes part of our vocabulary for working together.





Sketch

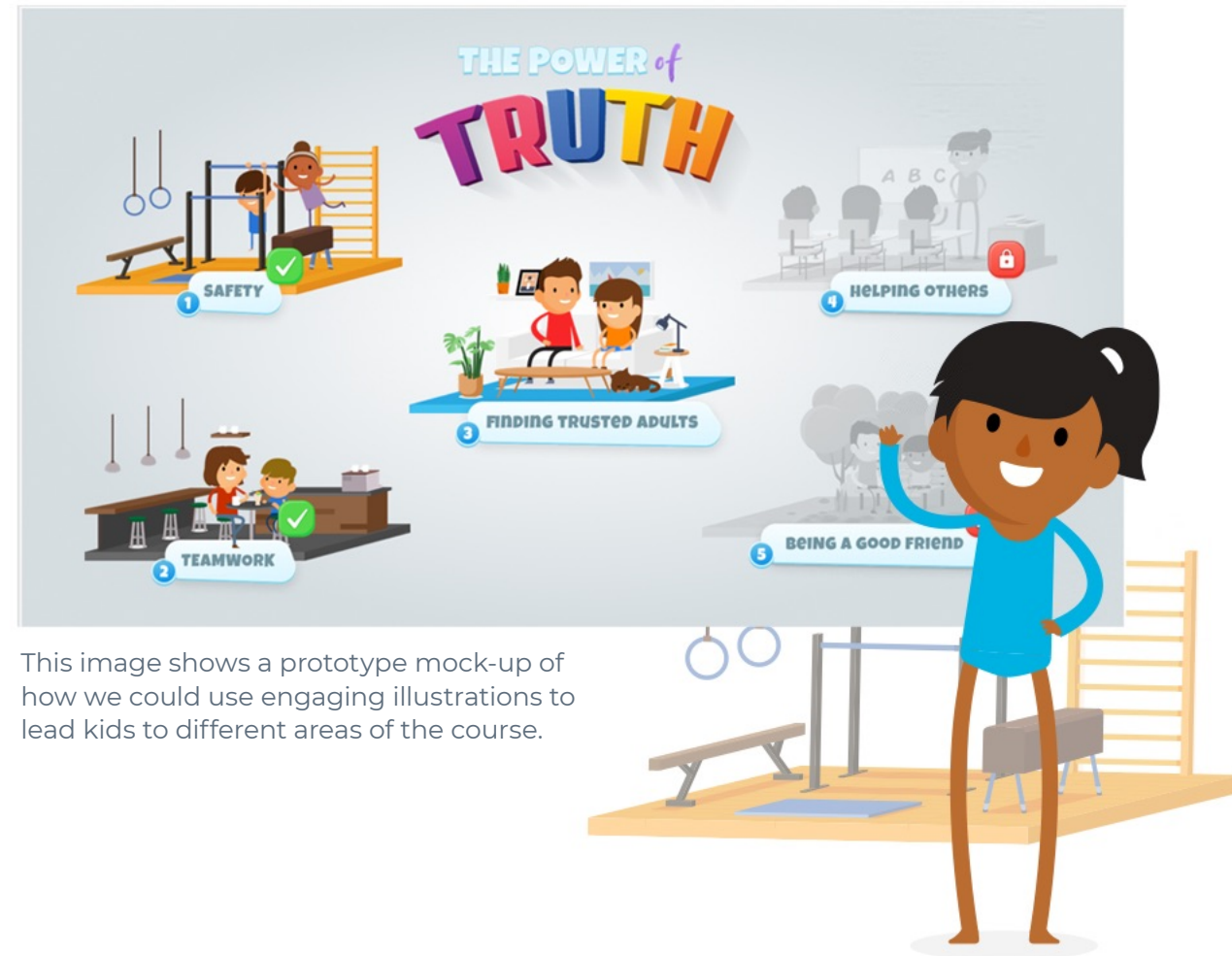
Making Prototypes

An advantage of virtual CoDesign is, because we are not traveling, we don't need to fit the experience into two sequential days. This flexibility means we can schedule time for the SweetRush team to step away and create a more fully formed prototype (much more than what can be done in a day or afternoon during a live CoDesign session). And that's just what we did during the Sketch phase.

Read more about [how we made the pivot to virtual CoDesign](#).

Note: Please keep in mind these are sketch prototype mock-ups and do not represent the final product, including content and design.

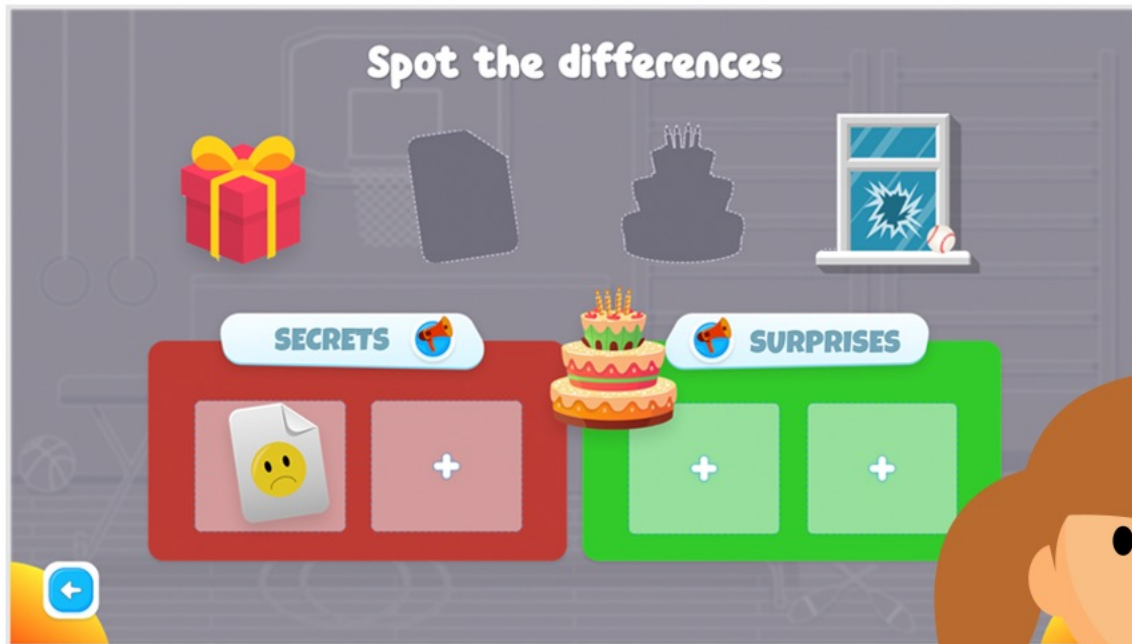
Each prototype focused on one topic area: using your voice. For the younger audiences, the content focuses on distinguishing between secrets and surprises. For the older audience, we focus on identifying trusted adults.



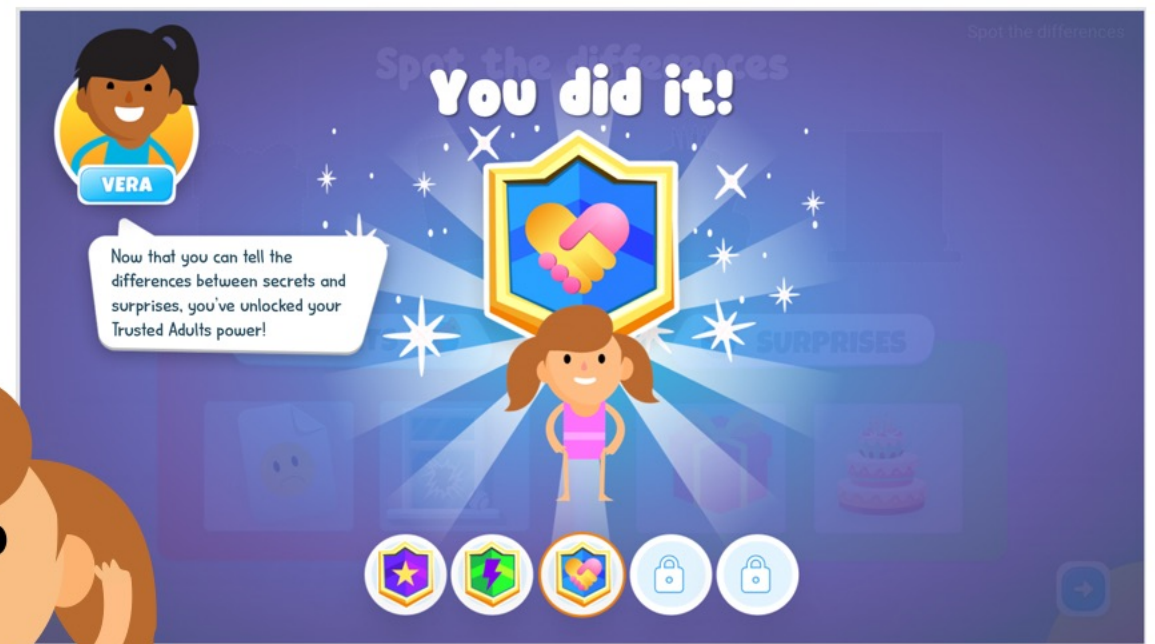
This image shows a prototype mock-up of how we could use engaging illustrations to lead kids to different areas of the course.



Sketch Prototype for Grades K-3



In this mock-up, we show how, after learning about the difference between a secret and a surprise, kids might drag and drop images to the correct areas of the screen.



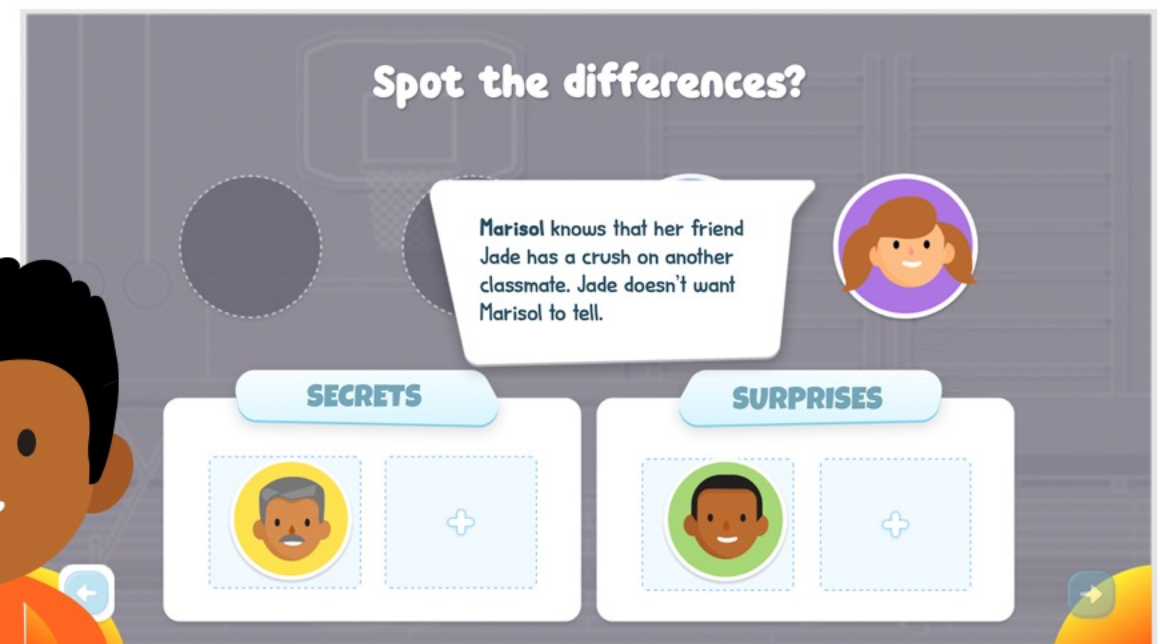
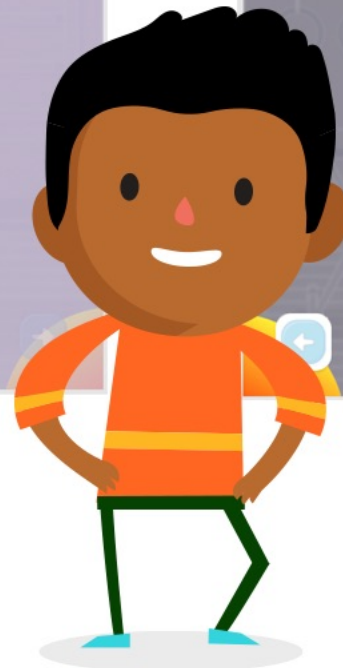
This prototype mock-up shows how kids might “unlock powers” by completing activities.



Sketch Prototype for Grades 4-6



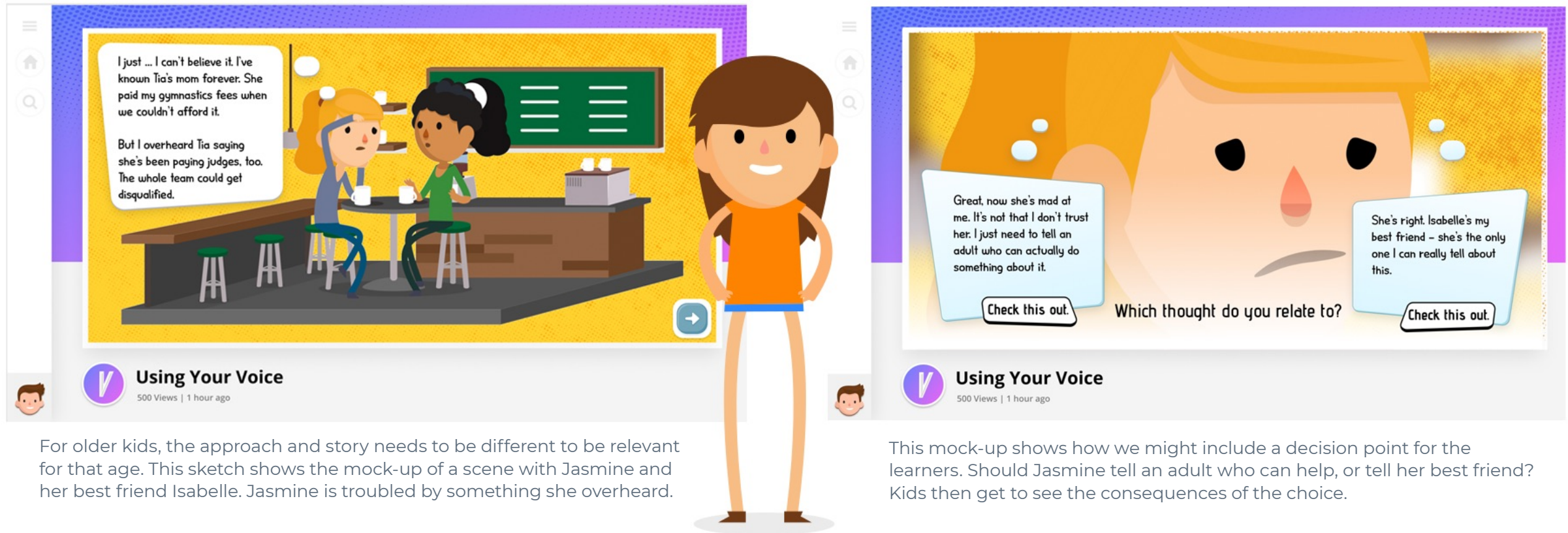
For slightly older kids, this sketch mock-up demonstrates how we might present more detail about secrets and surprises, with content relevant for this age group.



As this prototype mock-up shows, examples could include stories relevant to the audience.



Sketch Prototype for Grades 7-12



For older kids, the approach and story needs to be different to be relevant for that age. This sketch shows the mock-up of a scene with Jasmine and her best friend Isabelle. Jasmine is troubled by something she overheard.

This mock-up shows how we might include a decision point for the learners. Should Jasmine tell an adult who can help, or tell her best friend? Kids then get to see the consequences of the choice.

Knowing that the next step (spoiler alert) would include user testing with kids and their parents, the team felt a tremendous sense of responsibility to get it right. Stories were written, characters were created, and templates were designed.

Accounting for the three age groups, this was a monumental task, but we were ready for user testing after The NYSPCC's review and approval on the prototypes.



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Align User Testing



For the SweetRush team, after putting their hearts into the prototypes, seeing them being used by actual kids was a great feeling. The tests were set up in Zoom, with the kids sharing their screens, so the team could see what they gravitated to and if they hesitated or got confused in any area. We could see where they lost attention and what we could tweak to make the programs more effective.



One of the key things we uncovered when conducting testing for the K–3 age group was that kids who were older than we expected still struggled with reading. We decided that all interactions and even the buttons they click on need to include voice-overs. The value of testing just can't be overstated here. I have a five-year-old myself and I couldn't have predicted the specific ways kids in this age group interacted with our design.

—SweetRush Solution Architect

Testing with older kids revealed that the avatar style was too cartoony for them, so we did some A/B testing with different avatar styles.

In another important discovery, traits of older kids aligned with the research and The NYSPCC's experience. This age group will often answer in the way that adults think they want them to answer—for example, “I should speak up and tell an adult,” is a response this age group thinks is what adults want to hear. In reality, they're more likely to tell a peer than an adult. We saw this play out in the testing by paying attention to what they said and what body language they demonstrated. Testing revealed that we needed to craft the story and questions in a way that helps kids see that adults can be trusted.

We did two rounds of tests, applying the feedback after the first round and then testing with the same learners.



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CoDesign Outcome— the Solution Blueprint

And we're off! The end product of this collaboration, the Solution Blueprint, documents everything that's been gathered and learned during the process. **It defines a path forward for the solution that will guide The NYSPCC team and the SweetRush team in developing and implementing the program.** It's a robust document—58 pages in this case!—that gives the team everything they need to move forward with creation.

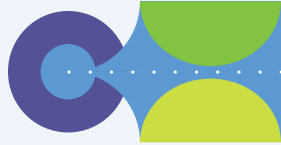
It's always a good feeling to know you're on the right track as you start to build a learning program, with assumptions validated and user input gathered. When you consider the needs—helping kids to speak up against sexual exploitation and abuse, and avoid further pain and suffering—we all feel a powerful feeling of responsibility to get it right for these kids.

Once again, the CoDesign experience supported the team in crafting the right solution, with all parties active and engaged in shaping the design. Learning programs are important and represent a great investment of time and resources. CoDesign enables buy-in and dramatically boosts the effectiveness and return on investment.



INSIGHT

The Coronavirus Pivot: Making Virtual CoDesign



As a 100% virtual company, it was always in our longer-term game plan to transform CoDesign into a virtual experience, and we were well along the path, pre-COVID-19. The pandemic then accelerated those plans.



We had been thinking about and making steps toward our virtual version for a long time, but then all of a sudden we had two CoDesign experiences sold and no way to travel. It was a rigorous and intensive pivot.

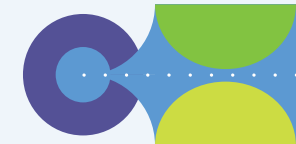
—Lauren Granahan, SweetRush Director of Organizational Effectiveness

How did that pivot happen? Check out these insights from the SweetRush team—many of which can be applied to your own digital transformation.

► Reinventing the Schedule

The travel involved with the on-site version imposes a time constraint on the experience; the entire design thinking experience has to happen over two consecutive days. The shift to virtual gave the team freedom to explore an alternative scheduling plan. Could more breathing room in the process add value? Turns out, the answer was yes.

In virtual CoDesign, teams typically take about a week to a week and a half to arrive at the Sketch step (the fourth step of five). Then, the SweetRush team works internally for about three days to create a prototype. Then, the group reconvenes for the Align step. The result: our client ends up with a more functional prototype that then speeds up production. And throughout the process, the SweetRush team can work ahead on the Solution Blueprint.



" *We found that the pacing was so much better. The virtual CoDesign schedule gives everyone more time to ruminate on what we learn, and they come to the next session fresh and ready to keep building. We also found that teams could do some of the work on the Solution Blueprint throughout, so it's not a crunch at the end. Our goal is to get the Blueprint in client in-boxes as soon as possible, following the last session.*

—Lauren Granahan

And, of course, eliminating travel time and costs for all parties makes virtual CoDesign a more cost-effective option.

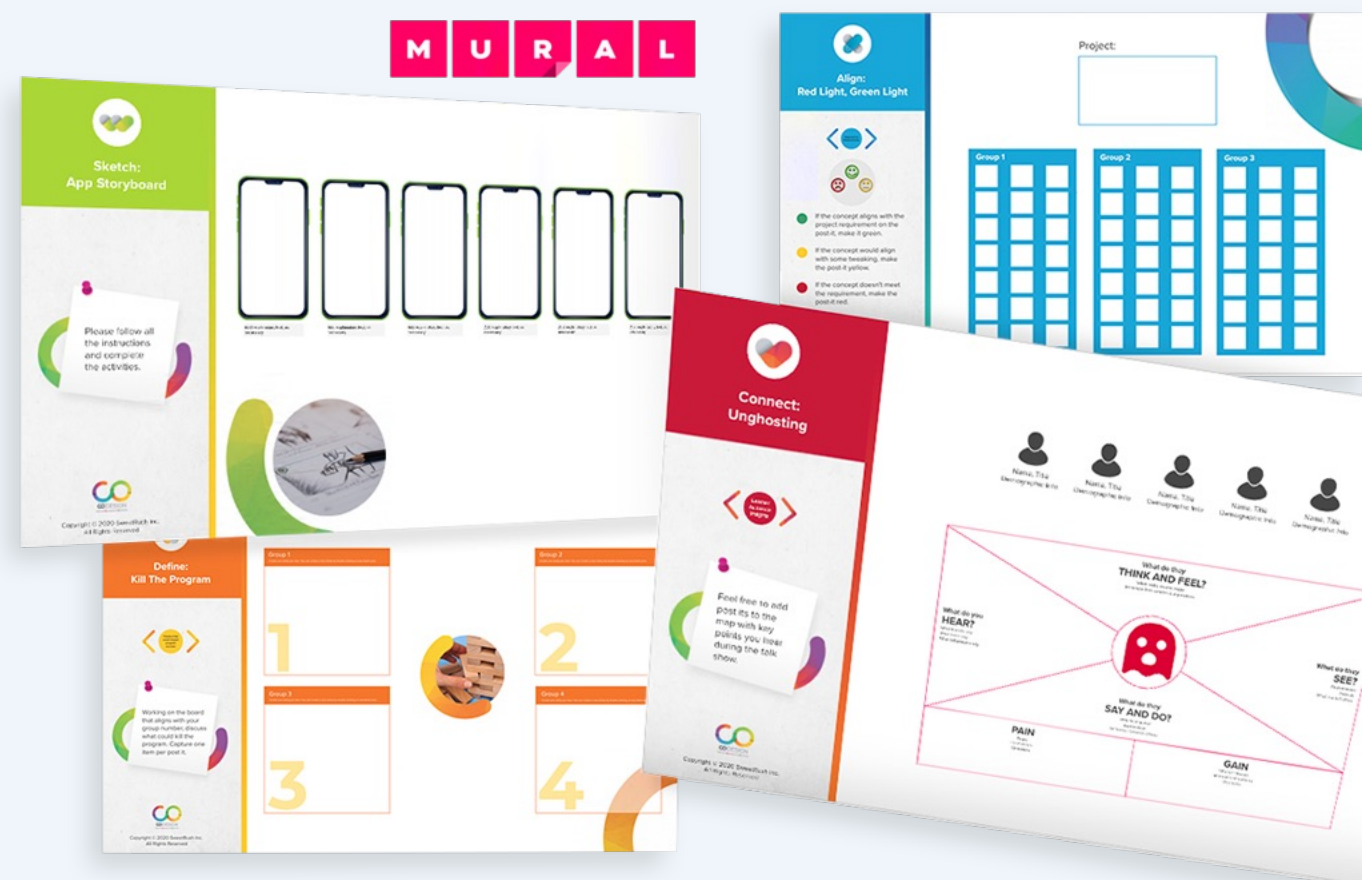
Transforming to Virtual Collaboration

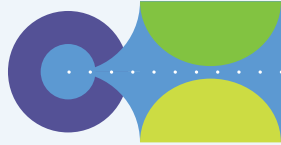
The leader's guide for on-site CoDesign included 35 possible activities with detailed facilitation notes and participant instructions. First step for our virtual transformation: prioritization.

" *We reviewed the activities to see which ones would translate to virtual, and then prioritized the ones we needed for our first two virtual CoDesigns. Our focus was, how can we modify this activity so it's engaging and interactive? Design thinking cannot be a passive experience.*

—Lauren Granahan

Critical to the transformation was the SweetRush team's choice of Mural as its virtual collaboration tool. They solicited volunteers to try out the new activities and, once the activities were vetted, worked with the graphics team to brand them for the program.





The Producer Role Comes into Focus

While in-person facilitation is certainly an art, it's typically more low-tech compared to virtual facilitation—and that is certainly the case with virtual CoDesign. While our on-site facilitation can be conducted with one master facilitator, virtual CoDesign highlighted the need for an additional role: producer. The producer ensures all of the technology and tools are prepped and ready during the CoDesign sessions, and helps participants if they're having issues.

This all needs to go off in a really seamless way. There are a lot of moving parts: pre-communication and pre-work, ensuring technology readiness. Each activity has its own choreography.

—Lauren Granahan

The team also rewrote the leader's guide for the virtual experience to accommodate both the Facilitator and Producer roles. It now features a “run sheet” of the program and a breakdown of steps for each role, including a prep section, Mural specifications, and timing.

A Good Surprise: Increased Engagement

My biggest concern about the transformation was keeping engagement high. The on-site experience is so fun, and I was concerned that it wouldn't translate.

—Lauren Granahan

In the virtual environment, the team quickly found that setting the right expectations was significant—participants needed to commit the time and be “plugged in.” When that happened, so did the magic: the team found that participants were more engaged in many cases.

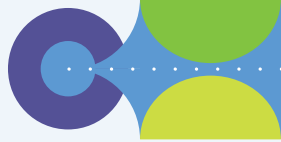
One reason for this is that the Mural boards give participants access to everything at all times—someone who might be hesitant to get up and look at a wall of Post-it notes at an on-site can find all of the information at their fingertips. “It just gives you so much more visibility into what's going on,” said Lauren.

In a virtual workshop setting, participants are much more open and willing to engage in unfamiliar approaches, as they have already had to say goodbye to their accustomed ways of working and their expectation that business will continue as usual. Unlike in face-to-face workshops, they can physically stay within their comfort zone while only their mind is being challenged by a new way of thinking and working.¹⁰

—Sebastian Hartmann, Global Head of Technology Strategy at KPMG, and
Lina Krawietz, Co-Founder & Managing Partner at This is Legal Design



10. <https://www.linkedin.com/pulse/benefits-virtual-design-thinking-workshops-sebastian-hartmann/>



Virtual CoDesign—Meeting the Increased Interest in Design Thinking for L&D

As the word gets out about design thinking and how it can be used to create effective, learner-centric solutions, demand is increasing. The SweetRush team has collaborated on almost the same number of virtual CoDesign experiences as on-sites, *in less than a third of the timeframe*.

And just like the iterative process they're facilitating, the SweetRush team continually improves CoDesign with lessons learned from every session. One important evolution is they've started to create modular experiences that can be leveraged during any learning program solution design, if the full CoDesign experience isn't possible.

“The goal is to be able to “plug in” activities that will have a positive impact on the solution design. It could be an empathy interview, so we're consulting with learners that we're designing the program for...or taking a beat and looking at the bigger picture constraints and implementation environment, as in the Kill the Program activity.

—Lauren Granahan

So, what's the prognosis? Will virtual CoDesign continue when we're past the pandemic? The benefits seem to speak loud and clear.

“I'm sure that in the future, when we can travel again, there will be some situations in which we'll want to get together in person. But for the most part, I think virtual CoDesign will be the go-to solution. From an expense standpoint alone, eliminating travel brings the cost down significantly. The additional benefits—more breathing room in the process, a more functional prototype, and the potential for increased engagement—make virtual CoDesign very attractive for everyone involved.

—Lauren Granahan





Key Takeaways

- 1 **Design thinking offers incredible benefits for learning solution design.** SweetRush has seen better, more learner-centric solutions, greater stakeholder and team buy-in, and stronger team engagement as a result of our CoDesign experience.
- 2 **Virtual CoDesign brings even more benefits**—greater engagement in the activities, more breathing room in the process, and a more functional prototype (which helps set up the next stages of the project for success).
- 3 **A best practice for strong virtual collaboration is understanding (and making space for) how individuals “show up” in a collaborative environment.** The SweetRush Creativity Ecosystem gives a name—well, actually, a creativity animal—to traits such as mental processing speed and comfort level in speaking up.
- 4 **For best results, choose a significant challenge, bring in your best experts, and arrive with an open mind and your best creative energy.** Design thinking can be an incredibly engaging team-building experience that offers a new perspective on what collaborative brainstorming can be!

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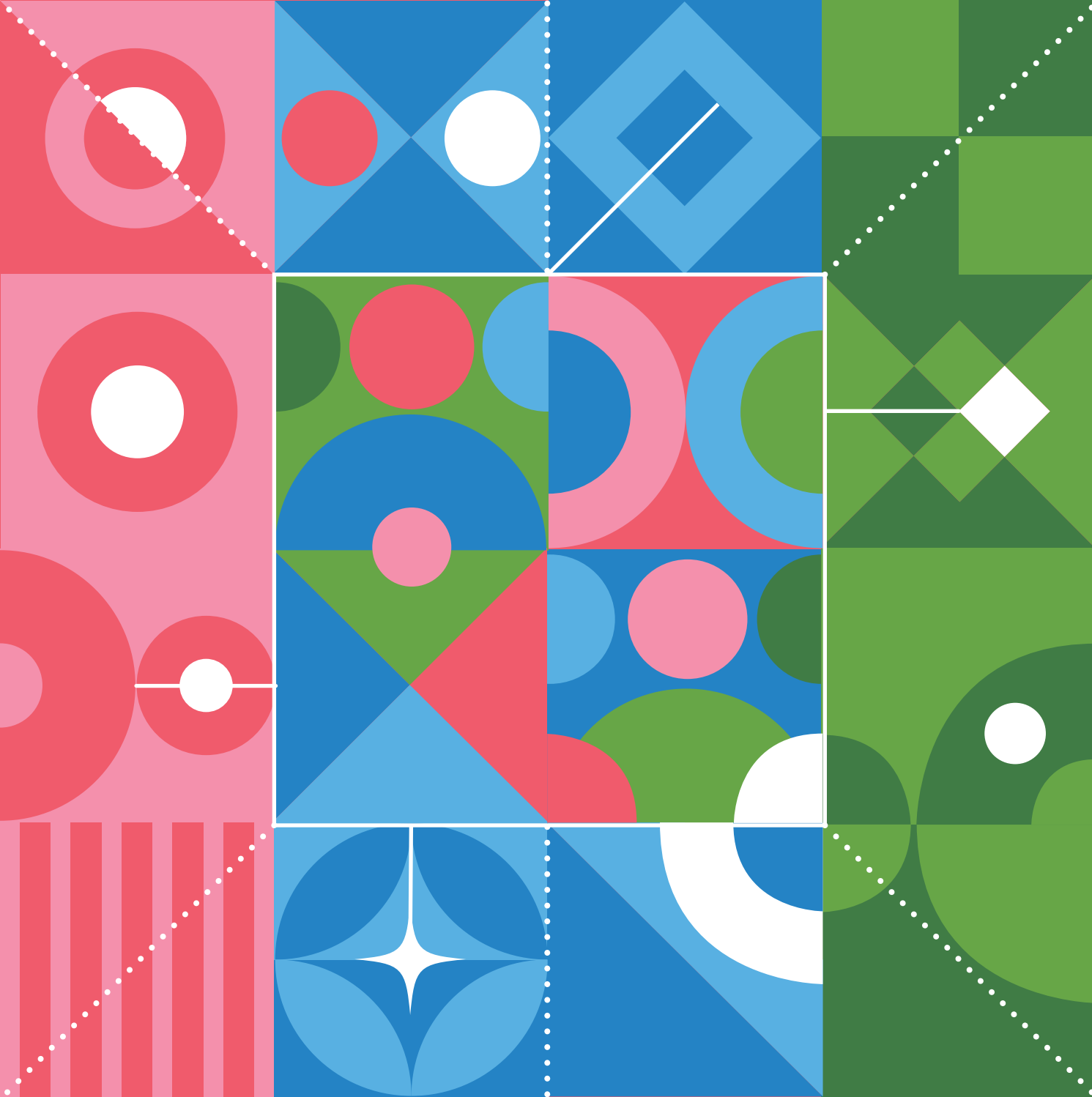
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Contact

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3

Diversity & Inclusion in Virtual Training:

Representation Matters



I was laughed at and belittled. I was there to seek treatment for what has become a life-altering autoimmune disease that I have been diagnosed with... Finding doctors that will even treat you is difficult. I can call several providers with you all on the phone, and I tell the nursing staff or front desk I'm transgender and just want to make sure they see people such as myself. And they come back after speaking with the provider and tell me they don't specialize in people like me or they don't treat people like me, or some other version. And all I'm trying to do is seek a primary care doctor.

—KELLY FARROW, ORANGE PARK, FL¹¹



Transgender people face discrimination in many areas of life, perhaps none so disheartening and discouraging as when they seek necessary medical care.

This year, the Williams Institute, UCLA School of Law, estimates that “483,000 transgender adults feel concerned that if they express their gender identity, they could be denied good medical care, and 77,000 feel unsatisfied with the care that they have received in the past.”¹²

Many transgender people avoid seeking health care because their treatment is often insensitive, traumatizing, and even incompetent. And many health care professionals want to be sensitive and appropriate in how they communicate and interact with transgender people, but they lack basic information on how to do so.

Enter the University of California at San Francisco Center for Excellence in Transgender Care (UCSF Trans CoE). Founded in 2009, the center's mission is to increase access to comprehensive, effective, and affirming health care services for transgender and gender diverse communities. With funding from the Centers for Disease Control and Prevention, the center has taken the lead in educating health care professionals on transgender issues, including basic concepts of identity, gender expression, and appropriate terminology.

11. <https://transequality.org/blog/transgender-people-share-stories-of-prejudice-and-stigma-in-health-care>

12. <https://williamsinstitute.law.ucla.edu/wp-content/uploads/Trans-COVID19-Apr-2020.pdf>



Traditionally, they've offered this training in person, flying out to locations across the country. But this approach is expensive and not scalable, and for the health care organizations themselves, pulling staff from work for a full-day workshop is often not viable.

UCSF Trans CoE needed a way to extend their reach, so they turned to partner SweetRush to help them create virtual training on this important topic.

Trans 101: Transgender People in Everyday Work and Life



UCSF Trans CoE's main goal was to create safe spaces for transgender and nonbinary folks. Not only had the center heard the voices of these folks, but many of our subject matter experts (SMEs) were trans and had similar personal experiences. They gave us a really clear picture of what lack of safety looks like.

—Heidi Green, SweetRush Lead Instructional Designer

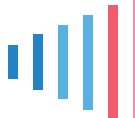
The virtual training course raises awareness about the lives of transgender people and the types of discrimination they face. It teaches doctors, nurses, and other staff to think about how they interact with and treat transgender people in medical settings.

Ultimately, it gives learners an opportunity to walk in the shoes of a transgender person, which builds empathy and is so essential to good care.

The program does this through carefully crafted, real-world stories of discrimination that transgender and nonbinary folks face, not only in health care settings but also in the workplace and other environments. Crafting these stories took keen listening skills and sensitivity.

As an ID, one of the most critical skills you can have is listening. When you meet with SMEs, you listen not just to their words but to the way they talk when they get passionate about something. Look for things that they return to again and again—these are the pain points. Listen for where the pain is and try to probe into what's going on there.

—Heidi Green



One story focuses on Jayla, a trans woman who is being disrespected by her HR Director. Though she asks to move the conversation to his office, he continues to discuss her HR matter in public and misgenders her by calling her by the wrong name.



The stories are designed to help the audience understand how certain behaviors show disrespect, demonstrate lack of understanding, and cause pain. Through Jayla's experiences the learner feels her pain and empathy builds.



Our SMEs were passionate about being co-creators, and it was a really powerful, iterative process. We were able to ask and get their nuances—and the nuances matter deeply in this work.

—Heidi Green

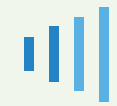
Representation in Virtual Training

Movements such as #OscarsSoWhite and #RepresentationMatters continue to shine a light on the lack of inclusion and the negative portrayal of under-represented populations in media and entertainment.

While academic research and opinion pieces tend to focus on representation in TV and movies, **it's up to all of us in the Learning and Development field to widen the lens and include virtual training as another way that people see themselves on-screen.**



+



Why is on-screen representation important?

It Shows Us Who We Already Are

According to 2018 U.S. Census Bureau estimates, the nation's population is nearly 40% non-white. By 2055, the country's racial makeup is expected to change dramatically. The U.S. will not have one racial or ethnic majority group by 2055, the Pew Research Center estimated.

—PBS NewsHour¹³

It Recognizes and Validates Human Beings

Specifically for the members of minority groups, seeing oneself reflected in the media is crucial, particularly in the face of prejudice, discrimination, and the constant barrage of invalidating comments and actions...to see a face or body that looks like your own is powerful in its effect to simply validate you as a worthy human being.¹⁴

—Dr. Eric Anthony Grollman, Associate Professor of Sociology, Department of Sociology and Anthropology, University of Richmond

It Builds Confidence and Inspires Us to Be Our Best

Representation creates relatable and powerful role models and sources of inspiration. What many seem to take for granted is the power of having a role model that you can look up to and relate to.¹⁵

—Glen Kisela, Creative Director

It Creates Change

When the same voices are being heard over and over again, conversation never progresses and the world is never challenged. Giving a voice to minorities allows everyone to have their worlds opened up and to have their beliefs challenged in a positive, constructive way.¹⁶

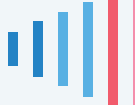
—Glen Kisela, Creative Director

13. <https://www.pbs.org/newshour/arts/why-on-screen-representation-matters-according-to-these-teens>

14. <https://egrollman.com/2012/09/24/representation/>

15. <https://www.criticalhit.net/opinion/representation-media-matters/>

16. <https://www.criticalhit.net/opinion/representation-media-matters/>



Meet Alex, Jayla, Quenton, and Skye: The Cast of Trans 101

One of the challenges that the UCSF-SweetRush team faced was the lack of available stock photography featuring images of transgender people in a variety of settings, displaying a variety of emotions. Since funds were limited for the design and development, a custom photo shoot was also not an option.

The team was committed to providing an authentic training solution for health care professionals, so they needed to find another way, and they did: illustrated characters.

"This was an amazing evolutionary process that involved ID, graphics, project management, and our SMEs. What we realized is that you can't tell a story about transgender and nonbinary people with only two characters, as we initially thought. The experience of trans women is completely different from the experience of trans men, so we have Jayla and Quenton. We have a nonbinary person who identifies with neither gender—Skye, and a nonbinary person who identifies with all genders—Alex."

—Heidi Green, SweetRush Lead Instructional Designer





ALEX

Gender Identity: Nonbinary

Sex Assigned at Birth: Female

Gender Expression: Androgynous

Sexual Orientation: Demisexual (I only feel sexual attraction to someone after having a close emotional bond to them)

Pronouns: "xe," "xem," and "xyrs."



QUENTON

Gender Identity: Man

Sex Assigned at Birth: Female

Gender Expression: Masculine

Sexual Orientation: Bisexual (I'm attracted to people with a similar gender identity as me as well as people who are different from me. Similar or different are the two sides of being bisexual. Get it?)

Pronouns: "he," "him," and "his."



SKYE

Gender Identity: Genderqueer

Sex Assigned at Birth: Male

Gender Expression: Gender fluid

Sexual Orientation: Pansexual (I'm attracted to people of any sex or gender identity!)

Pronouns: "they," "their," and "them."



JAYLA

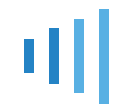
Gender Identity: Woman

Sex Assigned at Birth: Male

Gender Expression: Feminine

Sexual Orientation: Straight (I like men!)

Pronouns: "she," "her," and "hers."



Much like the stories and content, developing the characters and their personalities was an iterative process. Heidi worked closely with the illustrators to bring them to life. The objective of this course was to build empathy and understanding, so we needed to approach our characters with sensitivity and respect.



We realized that it wouldn't work to use avatars from our library with slight modifications; these characters needed to be completely custom-designed. Gender-normative appearance has been held up as an ideal for trans men and trans women. But the reality is that—though it's unique to the individual and may very well change in the future—in this day and age, trans people look a little different. For example, many trans women went all the way through puberty before transitioning, so they are taller, their hands are bigger, they've had facial hair.



The graphics team did an amazing job. Initially, it was challenging because we were describing a community they weren't familiar with, so there was a lot of back-and-forth. And then at some point, the illustrators caught fire, and we all saw where the characters needed to go. My backstories for the characters influenced their design, and their design influenced my writing, and the personalities came to life.

—Heidi Green

Read more about how [SweetRush has evolved its approach to representation in character illustration.](#)

The next challenge to overcome was finding suitable voice talent to authentically portray these characters. SweetRush worked hard to source appropriate professional voice talent, and UCSF approved all aspects of the characters and voices. Combined, these helped to bring the course to life in a way that was both respectful and believable.

Read more about [representation in voice-over.](#)

CREATING A TRANS INCLUSIVE ENVIRONMENT

Not all clinics support their transgender patients. The absence of knowledgeable providers negatively impacts access to care and contributes to health disparities, which in turn leads to poorer health outcomes for trans people.



Trans 101:

Making a Difference

UCSF Trans CoE now has a learning solution they are bringing to health care organizations across the U.S., regardless of location, in a scalable format that staff can access at any time.

"

Our SMEs really wanted this to feel genuine; that was critically important to them and their stakeholders. The characters, the conversational tone, the settings, the backgrounds—I don't think there was a single word written or line drawn that wasn't discussed during the process. Everyone worked hard to get it right.

—Heidi Green

The course can also serve as the prework portion of a blended learning solution. When they meet with organizations, they can request that staff take the virtual training course as a prerequisite. In the past, a lot of time would be spent discussing terminology—now, they can do a quick summary of what's covered in the eLearning and move on to deeper topics.

When providers have empathy for and listen to transgender people, it empowers both provider and patient to become partners. This can lead to improved health outcomes for trans communities and a far more sensitive and caring experience for all.

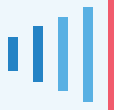


Trans 101 is making a difference in people's lives by educating health care professionals and building much-needed empathy and understanding.



INSIGHT

Diversity Trends in Illustration: A SweetRush Retrospective



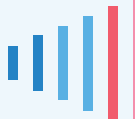
When looking at all aspects of virtual training, illustration may be the most striking and profound area in which representation has changed over time.

In this section of our eBook, SweetRush's 2D Team Lead, Jose Redondo, walks us through 10 years of diversity in SweetRush-illustrated characters, through a wide range of learning programs.

What you're about to see is a significant evolution. But we continue to be open and learn about representation, and how we can do better.

We're grateful for our client-partners and team members who collaborate with us and help us grow. We have had the opportunity to work with and for many communities, and that work has honed our commitment to and passion for creating authentic characters who live genuine lives.

Let's take a journey and see the evolution of diversity in illustration with Jose. We'll also hear from our friend, Heidi Green, the SweetRush Instructional Designer who walked you through the Trans 101 course earlier in this chapter.



About a decade ago, we started to put a stronger emphasis on storytelling and scenarios in our courses.

Jose Redondo, SweetRush 2D Team Lead

We started to experiment with changing skin tone, but the majority of our characters were still white, and everyone had the same body type.



Jose

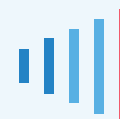
We started changing the skin tones more dramatically and modifying the shape of the eyes, hair, etc. This was a lot of variety for the time. But it's more or less the same character.

Importantly, it's the same type of head, modeled after white people. Now we recognize and illustrate differently shaped heads when we create a cast of characters.



Jose

We also didn't create any differently abled people during this time.



The next step was exploring diversity by representing variety in race and ethnicity, as well as exploring how to bring more individual personality to the characters through the use of accessories, hair styles, clothing, etc.

Jose

What we're still lacking here is attention to the body shape—you can easily see that all the bodies are the same.



Jose

Then, something happened. I had created a bunch of avatars of the actual people—the clients that we were working with on the project. So the team said, “Jose, you need to create an avatar for yourself!” Well, I’m a big guy, so I made my avatar like me, a big guy. I didn’t want the same body type as the other avatars because I wanted it to look like me.

THIS IS ME!

Jose

*Diversity is not just skin color.
Diversity is everything.*

This was Jose’s own personal “lightbulb” moment about representation, and there was no turning back after that. He recognized we needed to widen the lens on diversity even further.



So, we started to widen that lens. Here, we have a cast of characters that includes different races, ethnicities, heights, body shapes, skin colors, religions, abilities, gender identities, and sexual orientations.

And as character development became richer, so did “invisible diversity.” We began developing backstories for characters, and those backstories became more diverse. This meant that gender identities and sexual orientation became part of the character, even if it’s not a visible part of the illustration.

Heidi Green, SweetRush Lead ID

The work of an ID is immersing yourself in the audience’s world. It’s all about listening very closely to stories, to where the passion is, to the pain points. This is how you discover the backstories that can help you bring the characters to life.

Jose

In our heads, we felt that we needed to represent beauty all the time. But what’s beauty for me may not be beauty for someone else. It can be cultural or just personal preference. And let’s not forget that beauty comes from within. We needed to change that “chip” and see that everyone is beautiful in different ways.

This was really the tipping point for character diversity to become a standard practice. The focus now was on educating the illustration team.

Jose

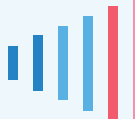
When you’re illustrating, what you put on paper is what you have in your head. If I’m surrounded by white people, then the first thing that I will put on paper is white people. If I live in a more mixed community, I’ll represent that. If I have someone with a disability at home, I’ll be more conscious to represent disabilities.

Every illustrator will draw—literally—from their life circumstances.

Jose

It really came down to helping the illustrators understand the “why” behind having a diverse cast of characters: our learning audiences can be tens of thousands of people or more—and diverse. And we need to represent everybody. Everyone needs to experience our courses and see themselves represented in the course.





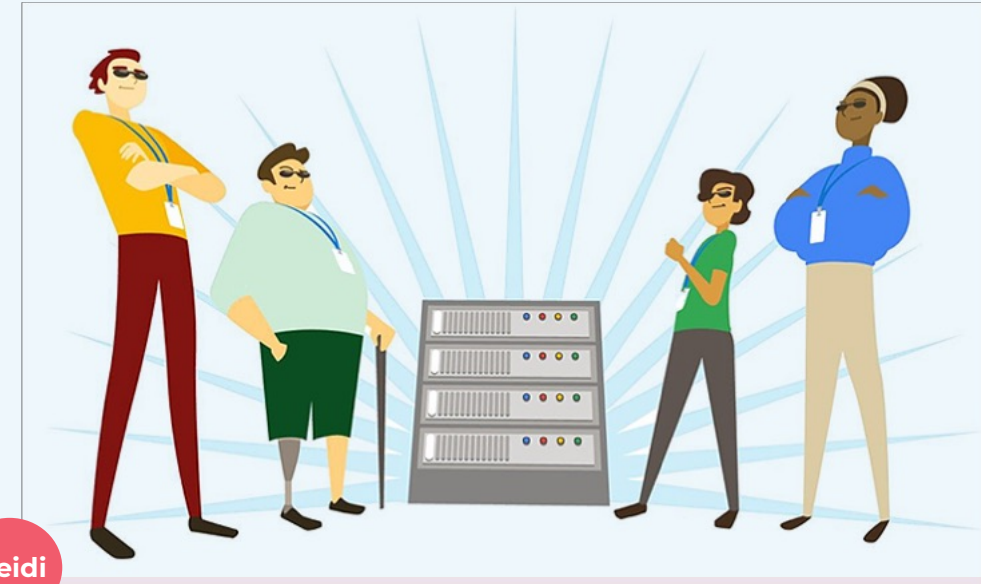
The next leap forward was increasing the focus on the context and scenes in which we were placing our characters.

Jose

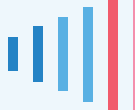
We had another version of this illustration, in which the Black character was kneeling on the floor. We recognized we had unintentionally put our character in a submissive pose, which could be offensive. We started looking at every detail. Now, they're all standing. There are different body shapes, a person with a prosthetic limb. There are different genders, but the clothing does not signal gender. We had to let go of bias and stereotype. In the context of the story, the message of this illustration that was unfolding was that all of them are heroes.



Heidi



*When I think about the difference between photos and illustrations, there are advantages and disadvantages to both. Photos are real people, so they will grab the learner in a way that an illustration never will. I think about how babies recognize other babies and want to touch them. It's the same thing with adult humans—we see other people and we connect with them. But the fact is, given the state of stock photos—even though there are good stock photos out there—**photos can only ever illustrate a story, whereas illustrations can actually tell a story because you can design them to the story.***



Context includes how different professions are represented in terms of gender and ethnicity. For example, are people of color represented in leadership roles or only as individual contributors?

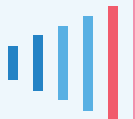
**Heidi**

The ID's role is to be a consultant to our clients. We need to help them meet their objectives and ensure that the learning program works for their entire audience. If diverse representation is not a specific request, it's our job to bring that forward and make sure that all of their audience is represented. If you are white, cisgender, and currently able-bodied, it's completely natural that, in the unconscious part of your mind, you're seeing most of your audience as white, cisgender, and able-bodied. Part of our job is to remind clients that their audience is broader. And importantly, we have to help each other recognize when we're not quite getting it right.

Jose

More clients were asking for diversity, and more and more, we were approaching the projects with this in mind because we were evolving what we considered to be inclusive representation. We started to do it as a practice. We started to include, where appropriate, older people and children.



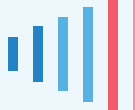


It depends on the subject matter and the client's brand, but we also started to see a trend toward more humanistic approaches, showing more emotion as part of the personality.



With the increasing use of storytelling as an instructional design technique, you see synergy between the illustrations and the character's stories that represent different realities.





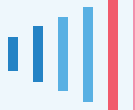
These examples point to how illustration can be a powerful alternative to photography, particularly when a photo shoot is not feasible for financial or health and safety reasons. This training is about sensitizing perinatal health care providers to the fact that, among birthing women, Black women are dying at three to four times the rate of white women. We didn't want to show them simply as statistics but as strong, powerful, beautiful women at grave risk due to systemic racism and unconscious bias.

Jose

Here, we wanted to represent Black mothers during the process of labor in a really beautiful and sensitive way, and there just weren't the right resources out there in stock photography. We wanted to represent Black moms in a very dignified way.

Heidi

This type of illustration-based storytelling requires a very strong collaboration between IDs and illustrators. We need to help each other craft vivid mental pictures. That helps IDs tell better stories and helps illustrators draw better stories.



Our Instructional Designers and Creative Directors started to give the characters in-depth backstories, sketching them out on a virtual whiteboard and introducing them to the illustrators. The illustration process has become more interesting and inventive, and the characters' personalities shine through in the details. They become individuals, and we find that our teams treat and protect the characters as if they are real people.

We find the subtlety and individuality in the characters through the stories.

Jose

In the past, if we had a gay character in a course, we might have thought: "Okay, how can I make sure that people know that he's gay? I'll add a scarf, or maybe he's walking a little dog." But we've all evolved to question whether we are just fostering bias and stereotyping.



In this course, there is a character, Heather, who the SweetRush team created as transgender. Heather prefers "they/them" pronouns, and there is a scene in which Heather meets up with their date in a bar. Through stories, characters can reveal themselves to the learner in a more natural way that feels true to who they are as individuals.

Learn more about this [incredible learning program for new people managers](#) in **Chapter 4**.

For this educational infographic, there was no stated requirement of diversity, but the illustrator instinctively took that approach.

Helping Children Wear Masks

**Wearing a mask can be difficult for all of us.
How can you teach and help a child to wear a mask?**

PLAN FOR SUCCESS

- Have multiple masks.
- Look for characters or designs the child enjoys when buying or making masks.
- Try different types of masks to find the right fit for the child.

PRACTICE TOGETHER

- Set an example and wear your mask properly.
- Practice with classmates, friends, neighbors, and family.
- Let the child help you put on a mask.

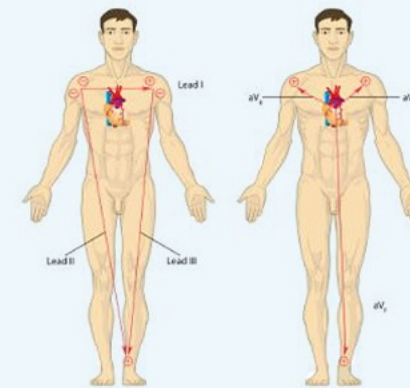


BE SENSITIVE TO EMOTIONS

- Practice when the child is well-rested, fed, and in a good mood.
- Plan breaks, especially if the child is overwhelmed or uncooperative.
- Acknowledge frustration.

Jose

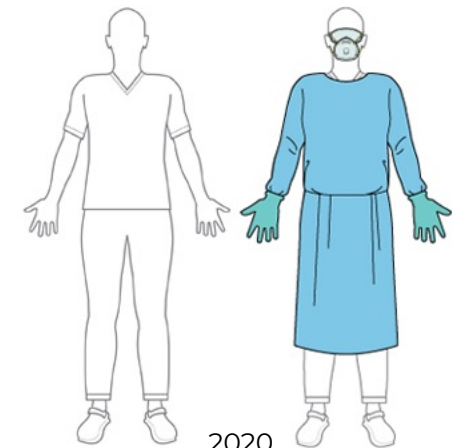
Now it feels weird when you see an illustration that doesn't show diversity. Something is missing. If it looks too monochromatic, it looks fake. Even if we are working with a style that's more cartoony, when we bring diversity to the illustrations, it looks more cohesive. Everyone feels connected with the illustrations immediately.



2008

Know Your PPE

Gloves Gowns Mask N95 Respirator Goggles Face Shield CDC Recommendations

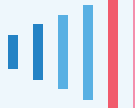


2020

The latest trend we are seeing is increased demand for “genderless” illustrations.

Jose

Here on the left, you see an illustration of the human body for a course about health. The specific subject matter was not about men, but we represented the illustration as a man, clearly and obviously so. On the right is what we are seeing more of today. Clients are asking for what we call “dolls”—in other words, body illustrations with fewer gender-specific characteristics.



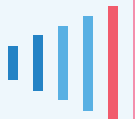
Related to this trend are increased requests for more cartoony characters with no gender.

We're seeing this more for clients who have extremely large and diverse learner audiences—for example, in customer training, in which the company has all types of customers. If having more realistic characters is not critical to the subject matter and storytelling, then this type of approach can work well.

Jose

Again, it's about context. We don't want to connect a particular problem—let's say, aggressive behavior or sexual harassment—to a specific race, ethnicity, or gender. We don't want to create or imply a subtext by unintentionally representing a specific group in a negative way. That's another reason for this trend.

Jose's #1 tip for improving diversity and representation in illustrations: treat your characters with respect. Consider them as representations of real people, rather than lines on a digital page. Understand their backstories, dreams, and desires. Find ways for them to express themselves in unique ways as individuals. Each of us is unique, and so are your characters, no matter what they are representing.



INSIGHT

Representation in Stock Photos—An L&D Challenge



Illustration provides total flexibility in all aspects of visual character development, from style and color to appearance, accessories, and context. However, illustration may not always be the best fit for your virtual training, be it for brand, style, subject matter, or financial reasons—or learner or stakeholder preference. **So, let's talk about representation in photography.**

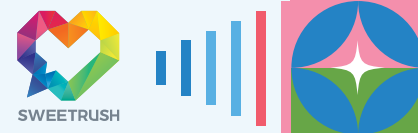
Live photo shoots may be cost-prohibitive or impractical for health and safety reasons. And depending on the experience of the models and photographer, we've found that they don't always yield the best results—and reshoots are typically beyond eLearning budgets. The tried-and-true method for adding photos to virtual training continues to be stock photography.

As in the case of illustrations, requests for diversity in photography several years ago focused on racial diversity.



In the past few years, this is changing course, and everyone desires to be more inclusive. And clients and SweetRush team members are looking closely at stock photos to avoid stereotypes. We avoid photos that are too staged with pretty, perfect people.

—Rolando Barrantes, SweetRush Design Lead



Here are some tips from the SweetRush team to increase representation using stock photos.

Widen the Lens of Diversity to Show Individuality

We've talked about representation in race, ethnicity, religion, ability, gender, and sexual orientation. As you saw in the above illustrations,



the next level is finding stock photos that really show individuality. We don't all show up to the office—well, when we show up to an office—in crisp, white, button-down shirts and black slacks. Everyone you encounter in the workplace is an individual—the goal is to represent that individuality within your virtual training and give your learners a vision of themselves, on-screen.

"Diversity is everything about the way you present yourself. Are you an artistic person? Are you into health and fitness? Everything that makes a personality come through in the way you look is diversity."

—Rolando Barrantes

Dig Deep and Put in the Time

Searching for stock photos may seem very simple on the surface, but finding the right combination of photos that represents the audience and their individuality will take some time.



"It can be difficult to find a good photo that fits the context. You need to have a mindset of wanting to find something different."

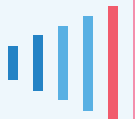
—Rolando Barrantes

ID Heidi Green agrees.

"So many stock photos represent white, able-bodied, cisgender people. It's harder to have diverse representation in photos. You have to spend more time digging. You may

have to compromise on other aspects of what you want to show, just to have people of color. Over-representing people of color can be very powerful, because they are discounted in society and the white psyche. It makes the audience think.

—Heidi Green



Staying organized can help. Create an easily accessible library of photos you've found and ones you've already used. A checklist can also help you keep track of the different people you've included and help you identify what might be missing.

"We're all evolving in our work in this area. We have to speak up and help each other recognize where we can improve. It's a continual learning process."

—Heidi Green

Find Your Photo-Based Avatar First, Then Write Their Story

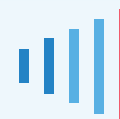
It's one thing to find a one-off stock photo for an individual screen or slide. It's a much bigger challenge to find a stock-photo-based avatar/character. This requires finding a photo series that includes multiple poses and facial expressions, within an environment that works for your story. You can see how that will limit your options.

"One way to approach this is to find the photo series first. Find a character that will work in your story first, then write the backstory of that character to fit the photos. It's a little limiting, but it just might be a working solution."

—Rolando Barrantes

There's only so much Photoshop magic you can do to a stock photo, but as Rolando says, that may change in the future: *"I wouldn't be surprised if in a couple of years we will be able to change the expression of a face, using AI. That's probably in the works."*





INSIGHT

Representation in Voice-Over Casting and Directing



The art of voice-over casting and directing is truly understanding what the learning program—and the particular scene—is trying to accomplish, and interpreting that in the correct way.

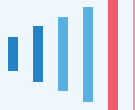
—Matt Leo, SweetRush's Audio Team Lead

The increase of diversity and representation in virtual training photos and illustrations translates to more diverse needs for voice-over talent—and the SweetRush audio voice-over pool has been growing and evolving to meet those needs. It now includes over 60 varied voice talents.



There's a desire to listen to people and have people teach you, who sound like you, so you can relate and empathize.

—Scott Shankland, SweetRush Audio Engineer



Creating a Common Language

Often, the team has everything they need in the storyboard to cast the right actors for the roles, but complex projects with large, diverse casts and/or sensitive subject matter may require in-depth conversations with IDs and clients. The approach to these conversations is evolving, too.

“It’s a question of expectations versus reality,” says Matt. “If we’re given, for example, a race or ethnicity and an age range for a talent request, that doesn’t actually tell us very much.” What the client is commonly looking for is a particular accent and tone.

But that doesn’t mean these conversations are easy, even when everyone is trying their best to do the right thing.

We are actively trying to get away from using words that can be distracting and offensive to others, especially when describing a specific race or ethnicity. For instance, instead of using a word like “urban” to describe a Black person’s voice, we will use words like “slang” or “casual.” As a team, we are working on a common language for describing voice that focuses more on tone, pitch, and other characteristics; this helps us use descriptors without sounding careless or disrespectful.

— Scott Shankland

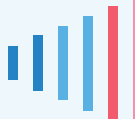
Gender is another descriptor that has been traditionally used to describe voices. The rising demand for gender-nonbinary characters and voices means taking gender out of the mix when describing a voice.



As a virtual company, we hire the majority of our voice actors through the Internet. Unless the actor has a website with a headshot, we may never know or discuss gender identity. Our focus is on the quality of the voice and how the actor could round out our talent pool.

—Matt Leo





Let's get some tips from the Audio Team for enabling greater diversity in your voice-overs.

Build a Diverse Talent Pool

If you're primarily using internal talent, see if you can branch out to using voice-over actors.

"We are always on the lookout for great talent that represents our diverse audiences. At the same time, we expand our talent pool slowly and selectively to ensure the quality, reliability, and versatility of our active voices. We receive hundreds of voice talent applicants, and our talent pool now includes around 60 people. It's really important to develop relationships and mutual trust with your actors."

—Matt Leo

Be Prepared to Find More Specific Voices

As diversity increases in stories and scenarios, more specific voices will be needed. This is typically a combination of characteristics—for example, a male with an Indian accent in his 20s, who is very warm and friendly.

"The biggest trend that we're seeing now is requests for younger-sounding voices. More learners will be in the Gen Z or young millennial age range, and we want to represent them in our characters and narrators on-screen."

— Scott Shankland

Consider Using Natural Speakers

Rather than asking actors to change their voices dramatically, hone in on the actors' natural speaking voices and cast them in roles that match their voice. This helps create a more conversational tone.

"We have some really versatile actors who can do a range of voices, even something like a parrot or a robot. But since the beginning, we've tried our best to hire people who we can cast in different roles to speak in their natural voices. And thankfully, 99% percent of the time, we nail it and deliver exactly what our client is hoping for."

—Matt Leo



Key Takeaways

- 1 Representation matters.** Learners need to see and hear themselves in virtual training, through the use of appropriate photography, illustrations, and/or voice-over. The more diversity you can bring to your learning program, the wider range of learners you can authentically connect with.
- 2 Representation is doubly important when your learning program needs to not only teach skills but also increase confidence.** Don't underestimate the power of seeing role models on-screen.
- 3 Treat your illustrated characters with respect.** Give them backstories, personalities, behaviors, and even quirks. Bringing them to life as individuals will help you avoid leaning on stereotypical touchpoints in your visuals.
- 4 Voice brings another opportunity for representation.** Using a diverse voice-over actor talent pool is essential. Evolve your thinking about the voices you require, focusing on tone, pitch, and location-based accents.

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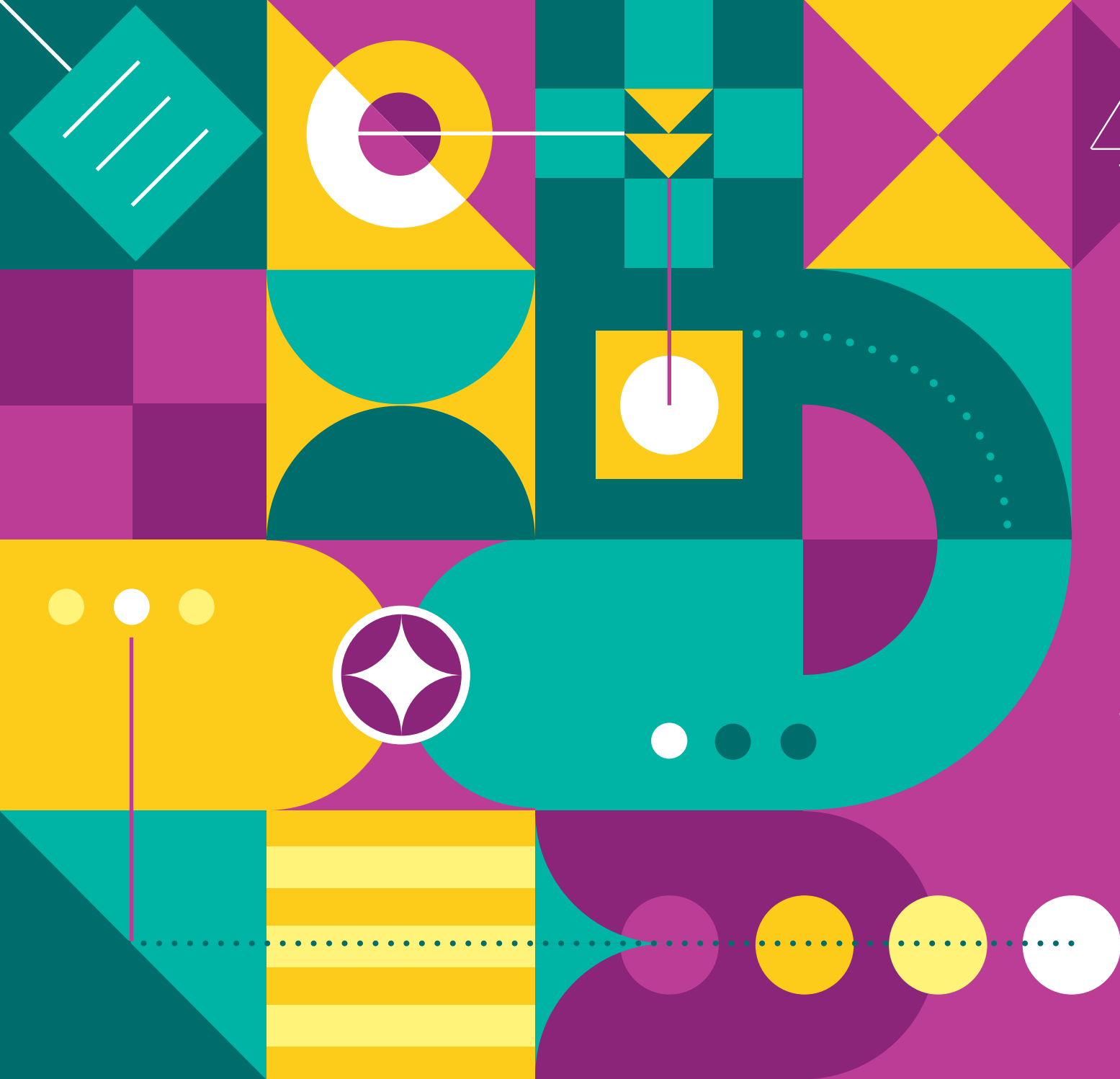
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SWEETRUSH



4

Creative Storytelling and Scenario-Based Learning

for Engaging Virtual Training



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Instead of making them feel great and inspired to grow in their roles, I had let these 10 employees down. All that caused me to realize something—that managing is a privilege. You don't have to be a manager to be successful in your career. It is a career choice, a choice that you need to take seriously should you go down that path. As a manager, you have a tremendous amount of impact on your employees' lives. And I needed to take that privilege more seriously.

—PAT WADORS

CHIEF TALENT OFFICER AND CHIEF HUMAN RESOURCES
OFFICER, SERVICE NOW

MY DIFFICULT, NO-FUN FIRST FEW YEARS AS A MANAGER¹⁷

The venerable Society for Human Resource Management (SHRM), a professional association with over 300,000 members in 165 countries, is on a mission to empower people and workplaces by advancing HR practices and maximizing human potential.

With two highly popular certification programs for professionals in HR, SHRM have identified a new area in which they could have a positive impact on organizations worldwide: **creating a qualification program for new people managers.**

No matter what industry you work in, the transition from individual contributor to people manager can be a painful one. Linda A. Hill, professor and author of *Becoming a Manager*, shares the words of one new branch manager at a securities firm:

“

Do you know how hard it is to be the boss when you are so out of control? It's hard to verbalize. It's the feeling you get when you have a child. On day X minus 1, you still don't have a child. On day X, all of a sudden you're a mother or a father and you're supposed to know everything there is to know about taking care of a kid.”¹⁸

17. <https://learning.linkedin.com/blog/learning-tips/my-difficult--no-fun-first-few-years-as-a-manager>

18. <https://hbr.org/2007/01/becoming-the-boss>



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In many organizations, training, coaching, and mentoring resources are limited or unavailable, leading to a sink-or-swim situation for new managers, putting them at risk of alienating their team members, feeling unprepared, and negatively impacting productivity.

SHRM wanted to change all that by creating a best-in-class learning program that teaches new people managers how to overcome the challenges they face. To reach an international audience of managers working in every industry, the training needed to be virtual.

What SHRM didn't want was a "Click Next" experience that got them to the assessment. **The team wanted a robust, highly engaging program that would speak authentically to an audience consisting primarily of millennials.** After an extensive RFP process, SHRM chose SweetRush to partner with them on this journey, and the SweetRush team was more than up for the challenge—excited to create an exceptionally creative and engaging program for SHRM.

What happened next was a little bit meta—a story of friends working and collaborating together and supporting each other inside the virtual training, and a parallel story of collaborators (who became friends) creating the actual virtual training.

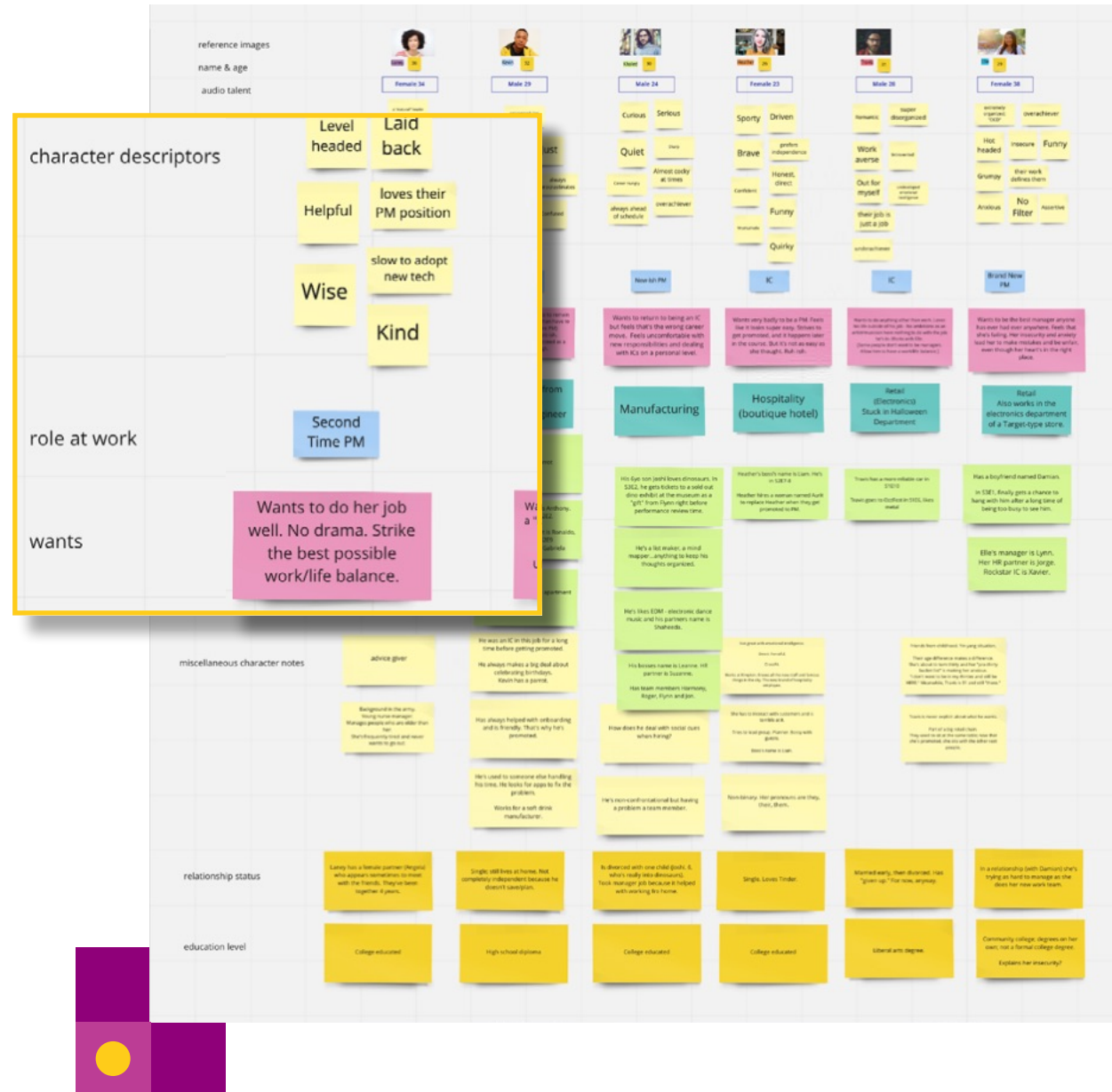
Six Friends Meet in a Coffee Shop...

Haven't I Heard this Story Before?

Effective people management is a combination of skills and behaviors, and SHRM identified 27 performance objectives and 110 behavioral indicators for the program, which would ultimately be put to the test via assessments.

The combined SHRM and SweetRush team knew from the get-go that storytelling needed to be part of the solution. Particularly in the assessment, SHRM wanted to put learners in real-world situations and evaluate if they met the qualification criteria. It shouldn't be easy and it needed to feel as real as possible.

Early brainstorming meetings hit on an idea with potential: What if the program followed six friends who are all new managers, meeting up at a coffee shop, sharing their experiences, and helping each other? The team was game to explore the idea, but not everyone was sold on it.



The biggest challenge that I had was in the beginning—the idea of six friends. I thought, “it’s been done before.” You cannot turn on the TV and not see an episode of something being done in a similar way. How are we gonna make this work?

—Hernan Muñoz, SweetRush Creative Director

The team started with a blank (virtual) whiteboard and focused on the character stories. Detailed backstories started going up on the wall: life experiences, work history and industry, personality traits, goals and desires, likes and dislikes, ethnicity, gender identity, sexual orientation, and abilities and disabilities. Two characters seem too much alike? Change the stories so they are more diverse.



We workshopped the characters. One of the exercises we did was just throwing out adjectives and attaching them to a character. Then we thought, what’s the opposite of that adjective, and who embodies that trait? Every character came to life with qualities and flaws.

—Hernan Muñoz, SweetRush Creative Director

The six friends and their stories were beginning to take shape. The original scope included photo-based avatars, but the team wasn’t having much luck finding enough variety of stock photos to cover 10 hours of virtual training. And the SHRM team’s vision was for these characters to be funky, trendy, and cool—representative of the millennial audience.



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Bringing these individuals to life meant a major change in direction—from photos to illustration. The characters mapped out had diverse body types, races, ethnicities, and abilities: all different people in all different environments. Many iterations were needed to get these characters where they needed to be, but they began to jump off the page. Tattoos, piercings, creative hair color—these details brought personality and individuality to the cast of characters.



Often when I'm drawing characters, it's like fiction—you're not representing someone in a very specific way. But with SHRM PMQ, these characters are alive. Early on, I realized, "Oh, they really want to do this. They want to create real people." And when I heard their voices, that made it even more real.

—Jonathan (Jonas) Ramirez, SweetRush Illustrator

As Jonas says, another key to bringing the characters to life were the voiceovers. The script and dialog needed to be great, but the voiceover actors needed to make sure the humor landed, the disappointment and confusion came through, and the camaraderie of the friends was palpable.

Including supporting characters—family, coworkers, friends of the friends, mentors, and even a pet parrot and a UPS worker—40 different characters were created for the program.



Travis would love to be making it as a full-time musician. Unfortunately, his retail job isn't getting him much closer to achieving that end, and he'll be the first to admit that he's a little resentful of his job for that reason.

Gender: Male
Pronouns: He/him
Age at start of show: 31
Occupation: An individual contributor at a large retail chain
Relationship Status: Divorced
Education: Bachelor of Arts



Elle has just been made a manager. And it's about freaking time. After a couple of years of not knowing where she was headed with her job, or her future, Elle saw her 30s barreling toward her and decided to put her mind toward being made a manager. And after a lot of hard work, her determination paid off.

Gender: Female
Pronouns: She/her
Age at start of show: 29
Occupation: New manager at a large retail chain
Relationship Status: Has a boyfriend, Damian
Education: Some college

Heather's the youngest member of the SHRM PMQ friend group and probably one of the most energetic.

Gender: Nonbinary
Pronouns: They
Age at start of show: 26
Occupation: Front of house individual contributor at a boutique hotel
Relationship Status: Single
Education: Bachelor of Arts



Khaled has had a roller coaster year: first a divorce, and now a promotion. But he's coming into his own at his new job, and he's working hard on his relationship with his 6-year-old son, Joshi.

Gender: Male
Pronouns: He/him
Age at start of show: 30
Occupation: Team manager at a soft drink manufacturing company
Relationship Status: Divorced
Education: High school diploma

Number one, **Laney** wants to be a great nurse manager. Number two, Laney wants no drama. Number three, if all this could happen with minimal reliance on computers, phones, social media, etc., that would be great, please and thank you.

Gender: Female
Pronouns: She/her
Age at start of show: 36
Occupation: Nurse manager
Relationship Status: Has a committed partner, Angela
Education: Bachelor of Science

Only recently promoted to manager at the start of SHRM's PMQ, **Kevin** says one of his main goals at work is to have fun. And do a good job. But also have fun.

Gender: Male
Pronouns: He/him
Age at start of show: 32
Occupation: Software engineer
Pets: gary (parrot)
Relationship Status: Single
Education: Bachelor of Science



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The Daily Grind:

Season 1, Episode 1, Scene 1, Take 1

The first rule of storytelling in learning programs is to make sure your stories are relevant and relatable for the audience. Speaking authentically to the audience is critical—if you're trying to capture and retain their attention and the story doesn't click, you'll lose them.

People in their first management positions are typically in their late 20s or their 30s. They're moving into the next stage of their careers, and, more often than not, they've had no formal training in people management. There are 12 million people managers in the United States, and 42% of them were elevated to their positions based on their performance as individual contributors—but they still have a lot to learn to be strong managers.

Empathy interviews helped the team see this topic through the eyes of the audience and understand their desires and preferences for learning. But the team also asked questions about how the audience consumes information and entertainment outside of learning...which eventually led to an interesting idea:



What if, instead of modules and lessons, the program was presented as seasons and episodes?

Suddenly the concept tied together—each episode features a story related into one of the core topics in the program, “starring” one of the friends. Other friends and supporting characters help round out the story. Each episode would have all the story elements and a standard plot structure, presented through a variety of activities. And just like any good entertainment series, the goal was to make it totally binge-worthy.

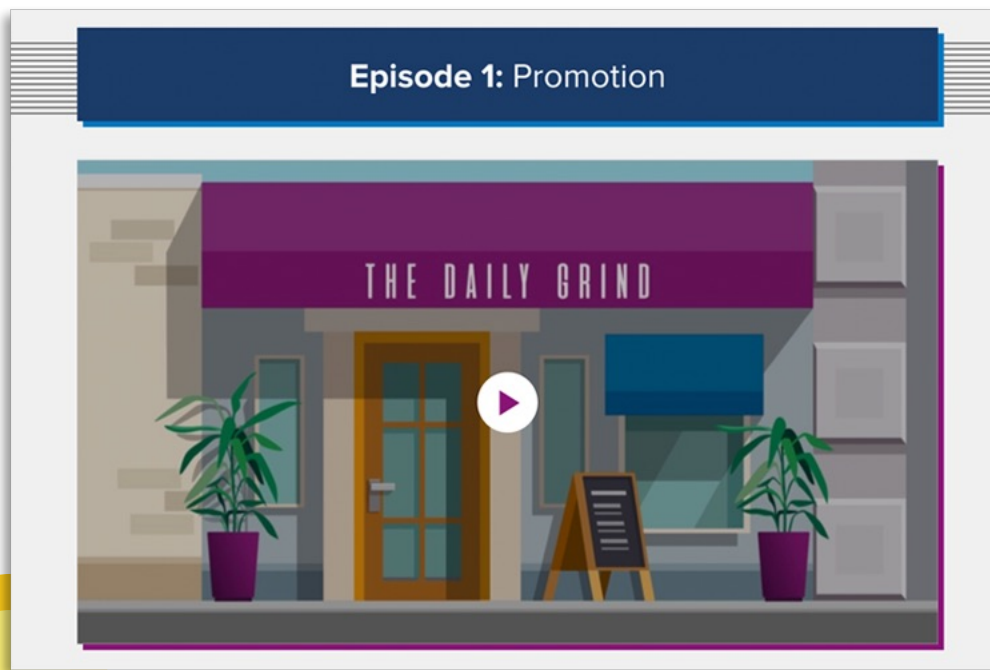


We created something like a writer's room. Our whiteboard tracked the topics for each episode, and we lined those up with the “story beats” so we could see how both track over the entirety of the program. We had a lot of latitude and creative freedom; it's definitely been one of my favorite projects to work on.

—Donald Harrison, SweetRush Instructional Designer



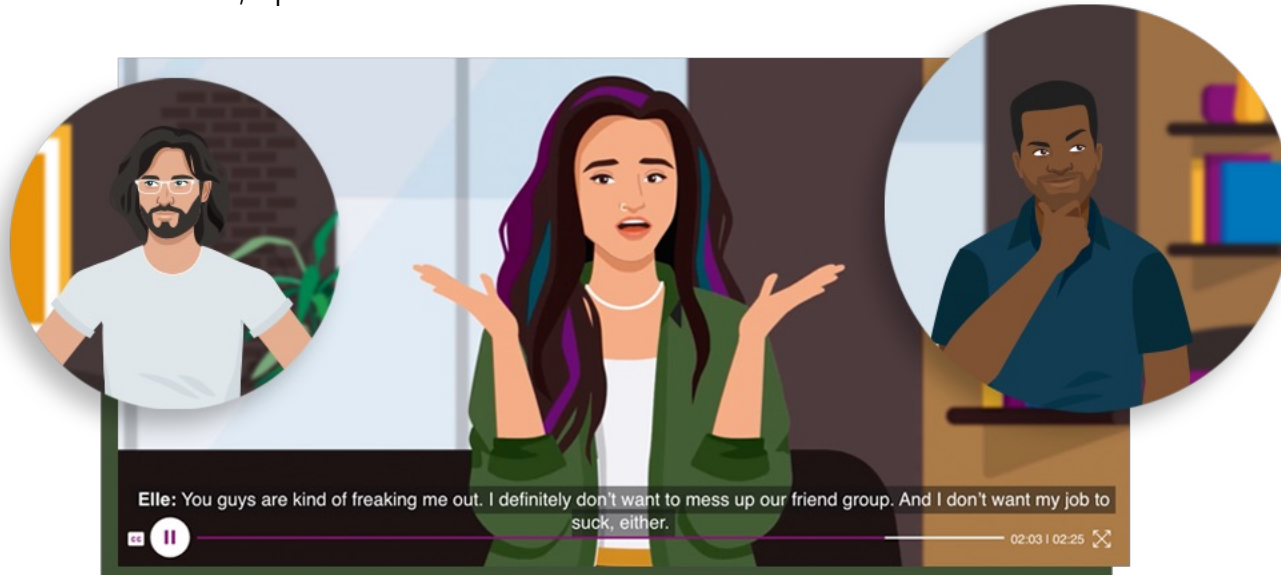
Let's see how this all plays out in
Season 1, Episode 1: **The Promotion.**



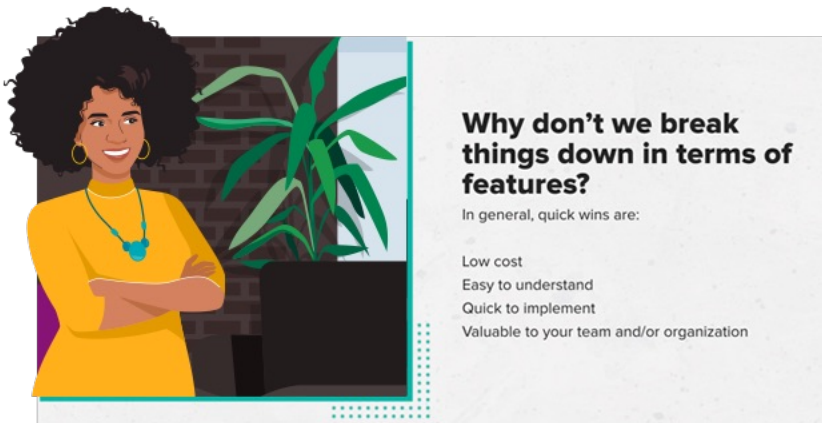
Welcome to The Daily Grind!



And here are our six friends gathered at their favorite spot.
Elle has a big announcement: she just got promoted!

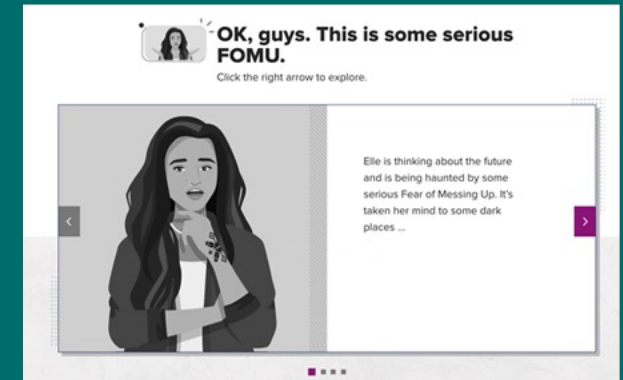
Season 1, Episode 1: *The Promotion*

Elle listens to her friends' reactions and is starting to feel FOMU (Fear of Messing Up)



Luckily Laney steps in with some sage advice about achieving quick and early wins (and introduces the performance objective for this episode).

FOMU: Fear of Messing Up



Another storytelling device the team created is “FOMU”—inspired, of course by “FOMO” (Fear of Missing Out), FOMU is the Fear of Messing Up. Let’s have our ID Donald explain FOMU.



We wanted the friends to experience challenges, but we didn't want to have things go wrong in a really big way as part of the episode's main storyline. At the same time, however, when you're writing a course on management, you need the learner to know what happens when things do go wrong. So we came up with FOMU. It's like a black-and-white version of the world where you're outside the story, in a parallel universe where things go really wrong. And then you come back to the technicolor world in which none of those things actually happened.

—Donald Harrison, SweetRush Instructional Designer

Season 1, Episode 1: *The Promotion*

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Cool. Can anyone give me an example?

Click each **PLAY** button below.



And the other friends step up and share some great examples of quick wins.

Hey! What would you do?

Think about your own place of work. No matter what your role is right now, **think like a people manager**. Use these strategies above to identify a couple different quick win opportunities.

In the space below, describe the first quick win you'd try to accomplish at your workplace, then click **SUBMIT**.

Enter your response here.

SUBMIT

Time for a little self-reflection! What are some quick-win opportunities at your workplace? (Activities like this help the audience process what they're learning to make the connection to their own work.)

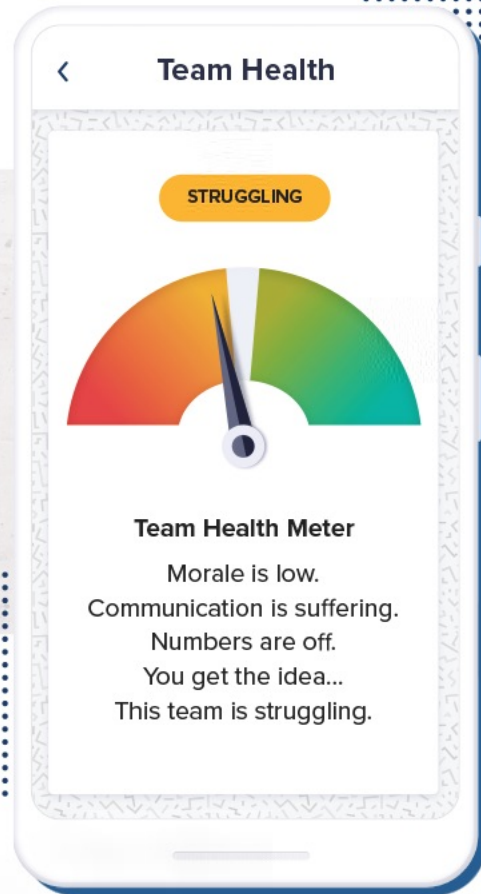


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Season 1, Episode 1: **The Promotion**

Health Meter:

The Better Workplaces App

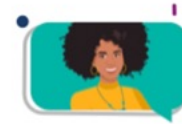


Looks like I've got some work to do.

How's Elle doing with her quick win initiative? Fortunately, her friend Kevin has created the Better Workplaces App, so she can gather feedback from her team and see how she's doing. (Not well at the moment.) The Health Meter offers a great storytelling device—and becomes a functional meter in the assessments, but we'll get to that in a bit.

What Learners Say

"I think that probably the best thing about the course is that it reminds [us] that people management is not an easy task and not just a natural ability but something that requires hard work."



Don't worry, Elle. This is going to be so great.

Just remember to relax and keep these things in mind moving forward.



Quick wins boost your team's confidence in you, your boss' confidence in the decision to promote you and, most importantly, your confidence in yourself.



If you're searching for a quick-win idea, remember to look for confusion, brainstorm solutions, listen and learn, and think strategically.

Like the song says, "I'll be there for you..." and the friends are definitely there for Elle, giving her—and, by proxy, the learner—some encouragement and summarizing of the key points from the episode.

What Learners Say

"I thought the animation and character development made Season 1 interesting! I didn't even realize I was learning so much as I was going through the episodes."



"Heather Wouldn't Listen to a Podcast!"

Now it was time to get to work. **The team had three seasons and 28 episodes to write—10 hours of elearning (!), assessments at the end of each season, and the series finale—to round out the qualification program.** It was a massive effort, fueled by the SHRM-SweetRush creative partnership.

On the SHRM team, Jennifer Currence, SPHR, SHRM-SCP, was inspired and worked brilliantly to provide subject matter content for each episode, along with bits of creative flair that inspired the SweetRush team. "She essentially wrote a book on people management," says Donald. Lead Instructional Designer Andy LaPage adds, "Jen felt like a full member of our ID team. She was incredibly responsive." SweetRush IDs would then take Jen's content and write the episode's story and dialogue.

To be real and believable, the characters needed to change as the seasons and episodes progressed, just as the learners are gaining knowledge and changing. With full creative license, SweetRush IDs brought their own flavor to each episode. But just like a multi-season TV show, there needed to be continuity police. (Tattoo QA—checking for consistent look and placement—became an actual job.)



The team got really invested in the characters. At one point, I suggested that Heather might listen to a podcast in one episode. Our Illustrator and Art Director were shocked. "Why would we have Heather listen to a podcast? They would never listen to a podcast. They would follow an influencer on Instagram, but they would not listen to podcasts." I knew then that the team was truly invested and had this well in hand.

—Hernan Muñoz, SweetRush Creative Director

Everyone in the design team developed a soft spot for a particular character, and in each episode starring that character, new details emerged. You see their living situations. You meet family members and mentors. They were weird, they had flaws, and that made it fun for the team—and ultimately, fun for the learner.



It was very important to SHRM that learners are able to see growth in the characters—as professionals but also personally. Heather comes to mind—they start off a little immature, a bit of a hothead. They have a "Bridezilla" moment with somebody at their hotel, where they work. But through the course and through their journey, they learn about emotional intelligence.

—Andrew LaPage, SweetRush Instructional Designer

INSIGHT

How Not to Lose a Learner: Keeping It Fresh Over 10 Hours of Virtual Training



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Let's face it—you won't become a qualified people manager in a one- or two-hour virtual training course. SHRM PMQ is an in-depth learning program that is designed to teach critical skills for effective communication, performance management, team leadership, and situational judgment.

How do you keep learners engaged over multiple hours of training? Here are three ways the SHRM-SweetRush team accomplished this in the PMQ program.

► **Create story arcs that span across courses.**

What makes you click on the next episode of your latest Netflix binge, when you know you should really go to bed? You've got to know what happens! The season-episode structure of PMQ lent itself to a similar treatment.



For example, in Episode 1 we find out that Elle and Travis are longtime friends and coworkers, and since she's the younger of the two, he's a little put out that she's been promoted before him. In later episodes, we revisit the Elle and Travis story and see them struggle with their power dynamic at work. How will it affect their friendship—and the group of friends—if the situation escalates? You have to keep watching to find out!

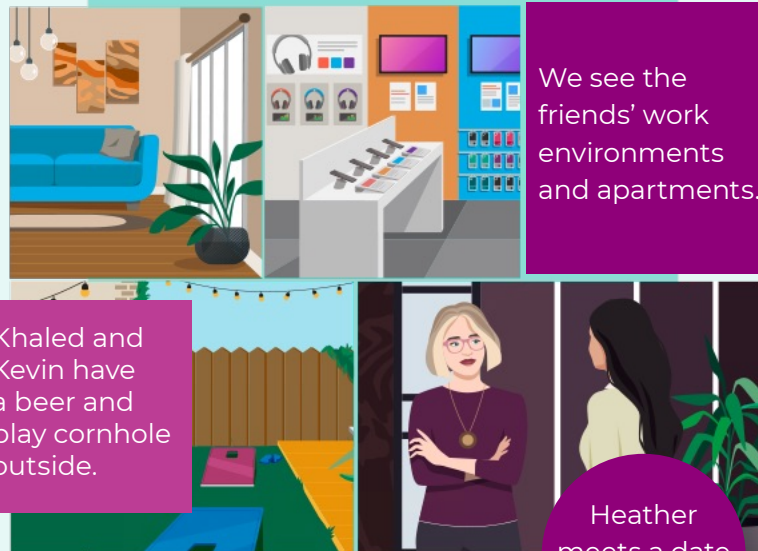


► Introduce new supporting characters and locations.

The six friends aren't the only players in the mix—in each episode we expand the “world” of PMQ by introducing new characters. Family and friends, coworkers, mentors, and more, support each episode's storyline, providing new challenges or giving advice to the main characters. The supporting characters provide another opportunity to increase representation in the program, and care is given to make them individuals in their own right. Who knows, maybe they'll go on to be the stars of the next qualification program!



Another technique the team used—again inspired by long-running TV shows—was to show the characters in new locations.

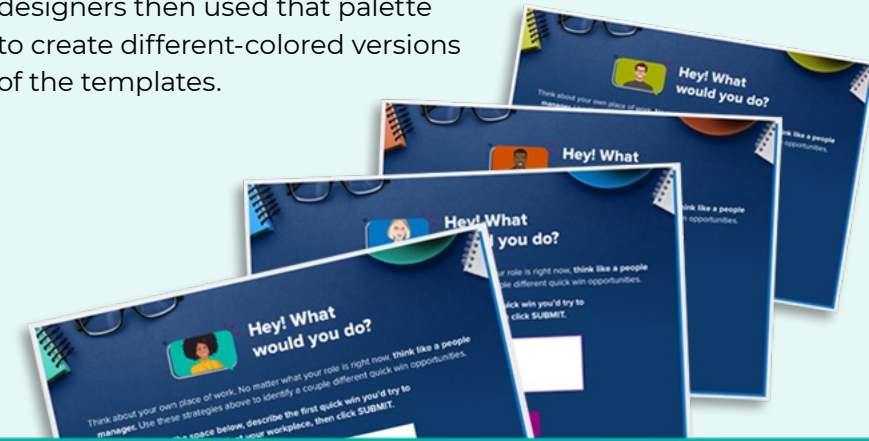


New locations (often inspired by Pinterest) serve to keep visuals fresh and learners engaged.

► Use graphic design techniques to add variety.

In the development of a 10-hour learning program, templates are essential to keep production fast and efficient. Leveraging your library while also injecting some variation to keep things interesting is the sweet spot of graphic design.

Since the illustrators had already defined a color palette for each character, the graphic designers then used that palette to create different-colored versions of the templates.



Each episode features one of the friends as the “lead” character in the story—and every interactive component in that episode features the character's colors. This adds variety to the look and feel of each episode, and it also orients the learner to who the focus is on for the episode.



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Giving Assessments a Storyline

With the characters, storytelling flow, and graphic assets in development for our bingeable seasons and episodes, the team worked in parallel on the assessment strategy. **The stakes were high—after all, SHRM was putting its brand on this qualification program, and the organization wanted to ensure that learners truly earned and achieved the qualifications upon completing the program.** Recall, that's assessing 27 performance objectives and 110 behavioral indicators!

"We worked with our psychometrician, Barbara, to create the scenarios in the assessments. She suggested the "setup," and then one of our IDs wrote the scenario. Then, Barbara ensured that the objectives and indicators mapped to the scenario questions.

—Andrew LaPage, SweetRush Instructional Designer

The team knew it wanted to align the assessments with the great work that was being done in the episodes—but the episodic format created a complication. Would the assessment be like a season finale? What if learners decided to skip or delay taking the assessment and moved on to the next season? Would they lose the thread of the story?

They decided to make the assessment stand alone instead of serving as a continuation of the six friends story. The assessments present the learner with multiple interactive scenarios that take place in the same environments as the main "show" (Elle's retail store, Lainey's clinic, Heather's hotel).

But now, the learner is *in* the story as a friend or coworker of one of the main characters. **Learners see a scenario play out and must provide advice and suggestions to the character on which actions would create the best outcome.**

Let's take a look at some of Scenario 1. No cheating, though—we're not giving away any answers!

Scenario 1: Welcome to the jungle

Congratulations! You've just been promoted to manager at Elle's store, overseeing a staff of four: Kirsten, Jerry, Efrain, and Craig.

You probably have a lot of questions, but don't worry—you'll be able to lean on the other managers, including Elle, Mario, Preeti, and Hermès, for advice.

Scroll down to begin the scenario.

Welcome to the jungle! You've just been promoted!

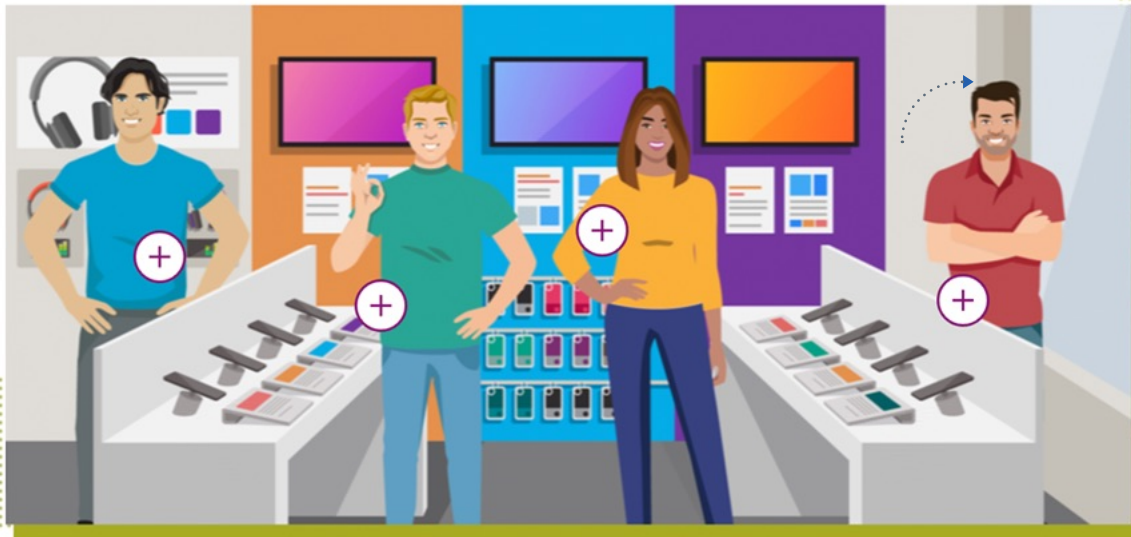


Assessment, Scenario 1



Reading minds

Oh, you can, too? Then what are your team members thinking right now? What does your promotion mean for them? Click on each direct report to read his or her mind.



First, let's find out what your team members are thinking about you—seems they've got some opinions on who your old work should go to, now that you're the manager.

So, how are you going to handle it?

Choose the best answer.

- ☐ I will ask the team what they can take on, and delegate from there.
- ☐ If I extend my deadlines, there is time for it all.
- ☐ I am a manager now. Time to delegate based on what I think my team's strengths and weaknesses are.
- ☐ Keep my old tasks. It is not fair to pawn off all my work on others.

SUBMIT

How are you going to handle it?

Assessment, Scenario 1



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Oh, look. Here come two of your team members.



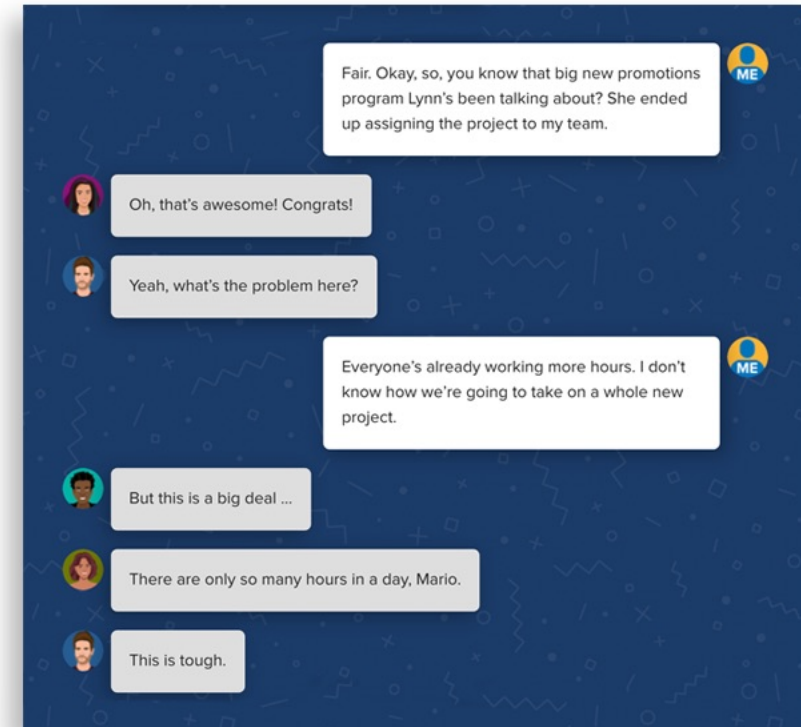
We have a problem with Kirsten.

Whoa, Jerry, we said we were gonna be chill about this.

Bummer, looks like there's a problem with some work you've delegated.

 What Learners Say

"There were many concepts I became aware of, that got me questioning how I currently manage my team and how I could manage and communicate with them well."



Fair. Okay, so, you know that big new promotions program Lynn's been talking about? She ended up assigning the project to my team.

Oh, that's awesome! Congrats!

Yeah, what's the problem here?

Everyone's already working more hours. I don't know how we're going to take on a whole new project.

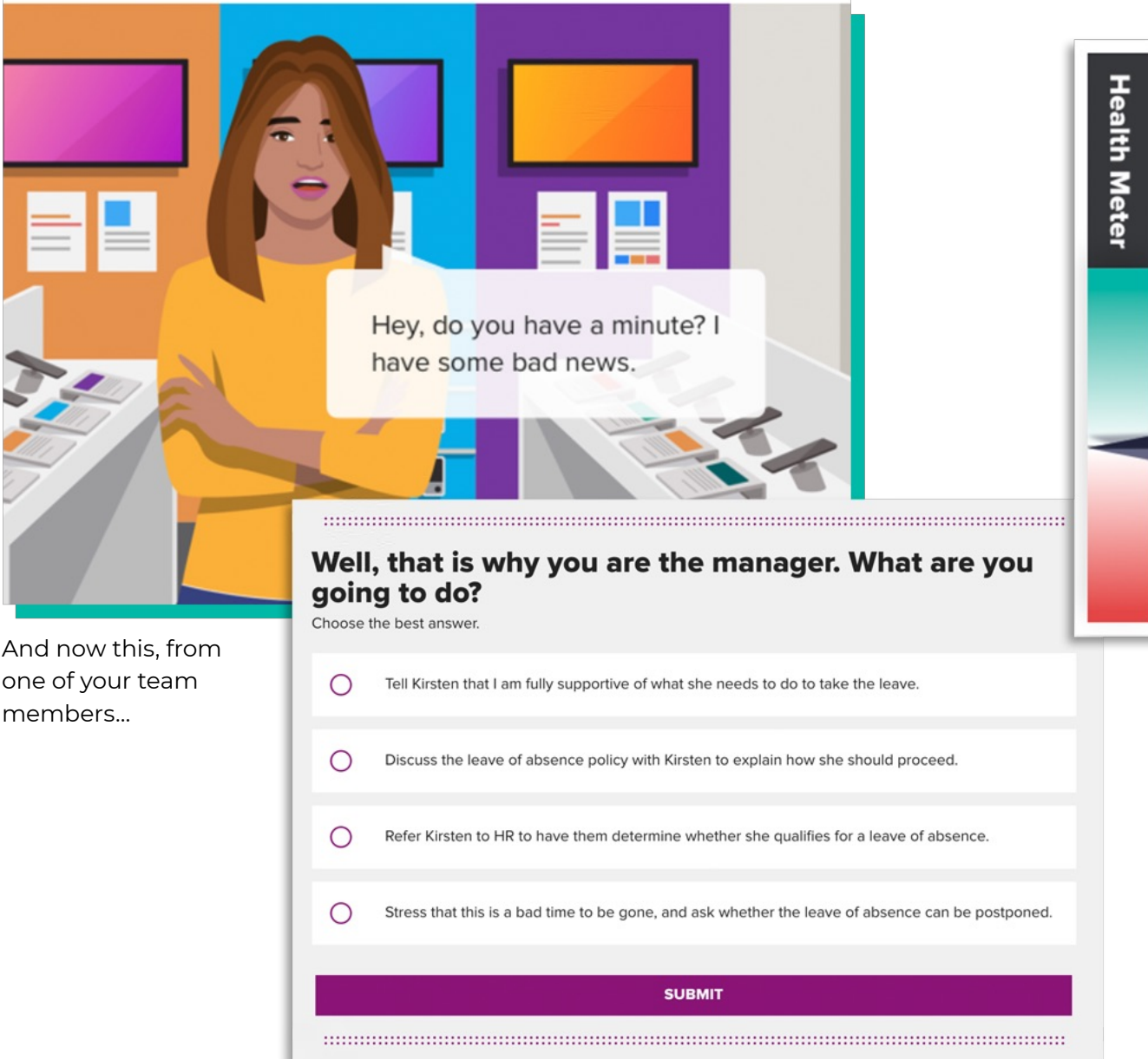
But this is a big deal ...

There are only so many hours in a day, Mario.

This is tough.

And now your boss has given you a big, new opportunity. Can your team handle it?

Assessment, Scenario 1



Hey, do you have a minute? I have some bad news.

Well, that is why you are the manager. What are you going to do?
Choose the best answer.

- ☐ Tell Kirsten that I am fully supportive of what she needs to do to take the leave.
- ☐ Discuss the leave of absence policy with Kirsten to explain how she should proceed.
- ☐ Refer Kirsten to HR to have them determine whether she qualifies for a leave of absence.
- ☐ Stress that this is a bad time to be gone, and ask whether the leave of absence can be postponed.

SUBMIT

And now this, from one of your team members...



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The Return of the Health Meter

The Health Meter also comes back into play during the assessments. During the episodes, it's used as more of a storytelling device, helping the characters see where they stand with their team and how their actions create consequences.

Now, during the assessment, the Health Meter becomes the learner's measurement of how well they are doing in the assessment scenario. Make the right choices and the meter goes up; make the wrong choices and it goes down.

At the end of the scenarios, learners see their full results and get feedback and remediation, so they can study up on the areas they missed and, if needed, take the assessment again.



What Learners Say

"I found this program to be easy to navigate and follow. While (I was) completing this PMQ program over the course of several weeks, the technology always knew where I was and was helpful. I enjoyed the health meter on the side of each test."



A Learning Program That's Actually Binge-Worthy

Put together, the SHRM People Manager Qualification program includes over 10 hours of virtual training. **It's tied together with an overarching storyline, yet each episode brings new challenges, fresh perspectives, and personal and professional growth in characters that learners come to love.** This is virtual training as we all hope it can be: effective and yet entertaining—or, as we like to say, binge worthy!

Finish one episode and you immediately want to know what challenges will face the friends in the next one. Will Khaled find his footing with his team? Will Laney have to face some drama? *Will Travis get fired?!?*

” *Ultimately, this was an incredible team effort with SHRM and SweetRush, and what made it successful was the work we did upfront to get into the heads of the learners. We sought to understand how they consume education and entertainment, and the end product is a great execution of that combination.*

—Andrew LaPage, SweetRush Instructional Designer

The need for effective people management training is real. According to SHRM, one in three workers say their manager can't lead a team, and 28% of HR professionals' time is spent addressing problems caused by poor people managers.¹⁹

The People Manager Qualification program is here to fill that need, and the response so far has been outstanding.



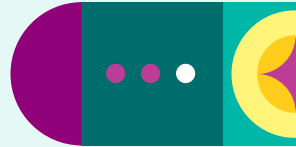
What Learners Say

“The content was REAL! It was almost as if someone was watching my life and creating content from it. The information learnt is timely, useful, and applicable.”

¹⁹ <https://www.shrm.org/pmq>

INSIGHT

Why Has Storytelling Become So Popular in Virtual Training?



What was your favorite story as a child? You probably didn't need to think very long or hard about that question; cherished stories stay with us for a lifetime. (Mine was *The Magic Faraway Tree*.) Perhaps you have even shared some of your favorite childhood stories with your own children or loved ones?



We have been telling stories for thousands of years. From our humble beginnings of sitting around a campfire and telling tales of our ancestors, to the current pastime of gathering with our “friends” to binge-watch a new series, we are both the creators and consumers of stories that inform, entertain, and connect us.

We've been telling them for many different reasons, too. From the cautionary tales of morality like Aesop's famous fables, to the entertaining tales of tragedy and comedy courtesy of the Bard, and cultural tales, passed on through generations of hunter-gatherers, that foster social cooperation and teach social norms.



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It's no surprise, then, that storytelling has a role to play in learning. Here are some of the benefits we see to telling stories and using story-based scenarios in your programs:

► **They Build Empathy**

Character-based storytelling can build empathy and help learners connect with the content in a way that is more meaningful, particularly when emotions are brought into play. When creating characters, be sure to make them as authentic and “real” as possible. Take time to think through your cast of characters and their backstories, and avoid stereotypes and caricatures at all costs.

► **They Provide Safety to Try (and Fail)**

Story-based scenarios and activities—specifically those that closely mirror the learner's workplace—enable learners to apply their knowledge and skills in a safe way. Learners are more likely to take risks and give things a try (even if they are not completely sure their experiment is the right approach) knowing that “failure” is an option—provided they learn from it, of course. When designing story/scenario-based activities, be sure to develop feedback that helps educate and inform learners on each of their choices—even the correct ones!

► **They Provide Context and Remove Uncertainty**

Storytelling and scenario-based learning are great tools for providing context and helping learners prepare for the unknown. When writing narrative for this purpose, think about how you sequence things and try to base your storytelling on what the learner can expect to experience when back in the workplace.

► **They Engage and Motivate**

Stories have the ability to make content more interesting and engaging—engaging content is motivating, and a learner's ability to navigate or sort through complex or difficult material is, in some part, determined by motivation. The more we can do to increase motivation, the greater the chance the learner will succeed. You can build motivation in your stories by creating true-to-life scenarios and stories that challenge the learner and that ideally evoke an emotional response.



Key Takeaways

- 1 Storytelling and story-based scenarios are proven techniques to engage and motivate learners.** They help build empathy, provide a safe place to practice, provide context, and remove uncertainty.
- 2** If you're looking to use storytelling as an instructional design technique, it's imperative that you understand your learners. **Talk to the specific group you're designing for.** Empathy interviews are a great way to tease out their learning preferences, find out what stories and style/tone will resonate, and get inspired. ([Read more in Chapter 2!](#))
- 3 To achieve a great end product, client-vendor partnership and collaboration can not be understated.** SHRM committed and delivered at every turn, and so did SweetRush. Teamwork makes the dream work.
- 4 Latitude and creative freedom can empower and motivate individuals to produce their best work.** Successful storytelling requires imagination, and giving teams that space can lead to amazing results.

Raise Engagement to New Heights

with SweetRush's Award-Winning Custom Learning Team

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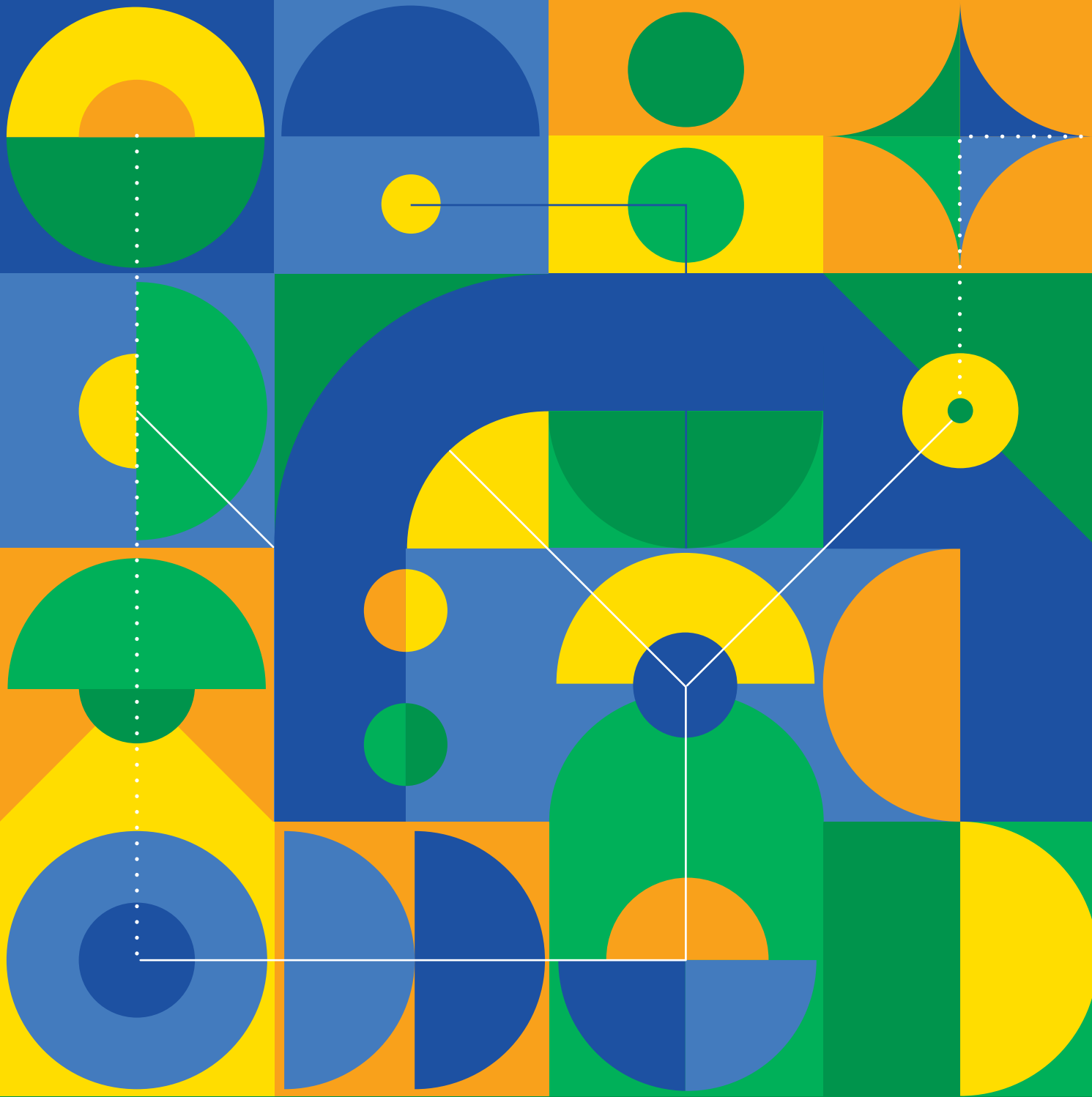
eLearning Industry
#1 Scenario-Based Learning

Learning & Performance Institute
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Virtual Training Reimagined:

The Virtual Learning Journey,
Starring a Pfizer Challenge

made with *love* by  SWEETRUSH



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It is good to have an end to journey toward;
but it is the journey that matters, in the end.

—URSULA K. LE GUIN,
THE LEFT HAND OF DARKNESS

Raise your hand if COVID-19 forced you to pivot your live classroom workshop to virtual, in record speed. It's a challenge that so many L&D professionals faced this year.

You did your best, and for the time you had available, you should be pretty proud of what you were able to pull off. It worked, but you know it's not a perfect, long-term solution. Ultimately, you want a more robust, learner-centered approach.

Could it be that what you're looking for is a virtual learning journey?



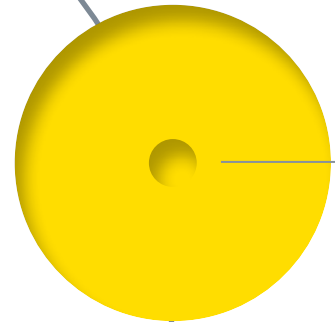
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The Learner's Journey Defined

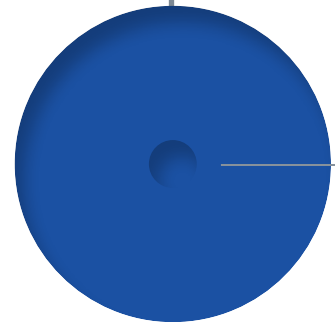
What exactly is a learner's journey? Is it just a fancy way to say blended learning? Didn't we used to call this curriculum design? While there is some overlap, we are actually talking about three distinct terms.

We asked Clare Dygert, Director of Instructional Design at SweetRush, to help us break it down.



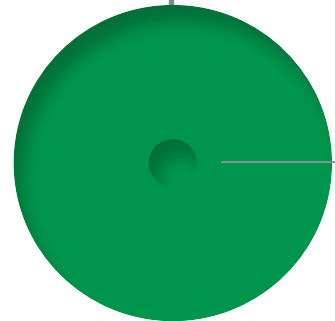
● Curriculum Design...Is About Content

When we talk about curriculum, we mean content and topics. Curriculum design refers to how the content and topics are organized.



● Blended Learning...Is About Modality

Blended learning describes a curriculum design in which the content and topics are broken up and delivered via a mix of different modalities. This can include anything from eLearning courses to ILT, vILT to videos, blogs, and podcasts to social learning—anything goes!



● Learner's Journey...Is About the Learner's Experience

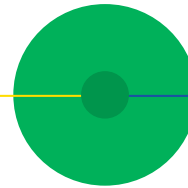
The learner's journey describes the end-to-end learner's experience with the content and modality, and everything in between—think marketing and communications, program administration, coaching, and follow-up. The learner's wants and needs should be known and placed front of mind when designing the learner's journey, in order to optimize the experience.



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There is often a strong focus on the learner's WIIFM (What's In It For Me) and on learning outcomes. These are unquestionably important in learning design. However, the learner's journey—the experience learners have as they navigate the learning program—is of equal importance. This is a subtle shift, but one that Clare believes makes a big difference in how we approach the design of learning experiences at SweetRush.



Content Meets the Learner's Journey

The intersection of curriculum design and the learner's journey is where you take into account how the content is organized. You might ask questions like, "How can I sequence and structure the content in a way that makes it better for the learner?" and "How should it all flow together?" For example, if your learner's journey includes curated content (such as books, articles, podcasts, etc.), Clare suggests that you take the time to index it.



Indexing the content helps the learner understand what their curated content is about so they can interact with it in a really purposeful way. When you're curating content you need to do it in a way that benefits the learners (and not you), so that it feels special and chosen just for them.

— Clare Dygert, SweetRush Director of Instructional Design

Modality Meets the Learner's Journey

The thing to consider here is learners' preferences for how, when, and where the content gets served up—and requires even more attention if your program design calls for blended learning. Do learners prefer the content in smaller or larger pieces? Should the content be spaced closer together or further apart? What modalities and technologies do learners prefer? How do these learners prefer to learn? What, if any, support might they want and need as they move through the program?

Of course, it's important to mention here that you should always use sound instructional design principles when you design a learning program. Here at SweetRush, we consider the learner's journey and experience to be a crucial part of that instructional design strategy.



To me, the ideal learning experience makes the learner think to themselves, "Wait a minute, this isn't what I was expecting. This is really different. The learning feels like it was made just for me."

— Clare Dygert



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Pfizer Digital IQ:

Transforming a Live Classroom Workshop to a Virtual Learning Journey

Let's draw inspiration from our friends at Pfizer, who, in collaboration with the SweetRush team, successfully balanced their instructional design strategy with the learner's journey and experience to create their Digital IQ program. While this program was designed and launched long before COVID-19, the lessons learned in shifting a live curriculum to a virtual one apply today more than ever!

Pfizer is a global leader in pharmaceuticals, with a marketing population of approximately 2,000 global colleagues working across five therapy areas. The Global Marketing Excellence Training (GMET) Team supports marketing capability development by setting standards of excellence and providing capability-based development programs, resources, and tools, all designed to support Pfizer's mission of delivering breakthroughs that change patients' lives.

The company recognized that in the “age of the tech-enabled customer,” winning players will leverage digital technologies appropriately. Every manager making marketing decisions needs to think about and leverage digital.

GMET saw the opportunity: inform, empower and enable marketing leaders to guide their teams to drive business outcomes in the digital age. The team envisioned a program that would help Pfizer transform its marketing team into a more digitally fluent organization, with leadership equipped to support their teams in developing and deploying customer-centered digital marketing.



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Phase 1: Digital IQ

Prior to the engagement with SweetRush, the GMET created a robust learning solution combining communications, independent study, instructor-led training, and follow-up. The core of the Digital IQ program was **an immersive live learning experience—a two-and-a-half-day workshop that taught new skills and gave marketing leaders the opportunity to practice skills within a gamified case study.**

These workshops each saw more than 100 attendees in three of Pfizer's major global hubs and provided a memorable experience that raised the profile of digital and gave senior leaders hands-on exposure to key digital tools and approaches.

While the live workshop was extremely well-received, **it was only able to reach a small percentage of the audience.** Combined with the costs inherent to delivering a live program, the limited reach propelled the team to investigate options for a virtual solution. Enter Phase 2!

Phase 2: The Journey from Classroom to Virtual

Pfizer's challenge—a very common one in learning and development—was to not lose the successful elements of the live experience in transitioning to a virtual training experience. A single platform learning experience, such as eLearning modules or PowerPoint/WebEx training presentations, was not the right solution. During the RFP process, GMET specifically called out to potential vendor-partners that there were no limits on creativity—that was music to our ears!

GMET was looking for creative thought-partners—and SweetRush was more than ready to step up to the partnership. What helped seal the deal for GMET? SweetRush operates 100% remotely ourselves, so we knew how to communicate with a global, remote audience.

With the partnership in place, we were ready to collaborate and bring Digital IQ into virtual.



Pfizer was looking for an agency that really understood what it means to “work globally and virtually” so that could be applied to the learner journey. The fact that SweetRush has always operated that way—no physical headquarters even—gave them the edge.

—Debbie Botwick, Senior Director, Global Marketing Excellence Training, Pfizer





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Understanding the Audience

You already know the first step to creating a learner's journey: getting to know the audience and their learning preferences. Even though the new Digital IQ program would leverage the learning objectives and content from the classroom experience, we completely transformed how it was delivered. Our new design needed a new experience, fit to the learner.

The audience analysis findings were interesting. Marketing leaders, who work all over the globe to promote Pfizer's pharmaceutical products, are not created equal.

- ▶ While there are core skills that all professionals in a marketing leadership role need to know, **the audiences, environments, and experience that each leader brings to the table can be very different.**
- ▶ We also found **variety in leaders' backgrounds, experience, and attitudes about digital marketing.** Some leaders are very open to learning new skills and techniques, while others are more set on the tried-and-true techniques they've used throughout their career.
- ▶ By nature, **marketing leaders are very competitive**, so competition was not only appropriate, but also—we believed—valuable to the learning experience.





Designing the Virtual Learning Journey

Based on the audience analysis findings, the team knew they needed to design a learning experience that would create excitement and give learners the satisfaction and thrill of sharing and brainstorming new ideas. It needed to inspire Pfizer marketing leaders, the group that can have the single greatest impact on moving Pfizer closer to its customers.

In transforming the program from live to virtual, radical changes to the design and an innovative approach were needed. The learning audience was no longer “captive” in a room—and the learning would happen in parallel with their busy work lives and many competing priorities.

To create an exceptional, learner-centric experience, Digital IQ needed to:





Through a strong collaboration, the Pfizer GMET-SweetRush team developed a first-of-its-kind, 28-day virtual learning journey for Pfizer marketing leaders.

The program is a blend of live webinars, asynchronous eLearning, self-reflection, peer-to-peer collaboration, review and assessments, and participant guides, all wrapped in a gamified experience featuring team-based competition—a true blended learning experience.



Creating Virtual Teams and Kicking Off

Marketing leaders are arranged into cohorts of about 30 individuals, divided into five teams of six participants. The teams are intentionally created to include a mix of business units and geographic locations, which adds diversity and richness to the group discussions.

Participants have shared that one of their favorite things about the program design is the ability to connect and learn from their counterparts in other regions of the world. Ultimately, marketing leaders face many of the same challenges, regardless of location. The exchange of success stories, best practices, and lessons learned informs and enriches Pfizer marketing as a whole.

The first step in their journey is a 60-minute live webinar that brings together the entire 30-person cohort. The webinar:

- ▶ Introduces learners to the purpose of the program and structure of the learning journey and what they can expect along the way



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- ▶ Presents the participant guide, which guides them through each step of the journey
- ▶ Establishes the five teams of six participants for the game and the social collaboration
- ▶ Identifies team leaders, who moderate the Team Collaboration Sessions
- ▶ Describes how the gamification aspect of the program works

The tone of the Kickoff webinar is all about creating excitement and engagement as learners embark on this journey, in which they will learn new skills and techniques for coaching their teams to maximize digital opportunities.



Cycles: Learning, Reflecting, Collaborating, Reviewing, and Sharing

The next part of the journey focuses on specific learning objectives with an exciting mix of learning modalities. Learners are given eight to nine days to complete a cycle of activity for three different areas of focus.



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The same structure is repeated through each of the three cycles, which provides a level of consistency and predictability within a program framework that is very new to the learners.

Let's walk through what each cycle includes.



Asynchronous, Interactive, Scenario-Based eLearning

Each cycle begins with a 60-minute eLearning course designed to teach the fundamental concepts and provide opportunities for the audience to apply what they've learned.

Woven throughout the eLearning modules is a core scenario, (leveraged from the Phase 1, live classroom version of the program) focused on the marketing of a fictitious drug, Loozall. Learners complete interactive activities related to marketing Loozall in which they practice managing and evaluating their (fictitious) team's work on the campaign.

These activities are directly relevant to marketing leaders' day-to-day work and help them expand their skills as leaders. During the activities, learners also earn points that roll up to their team's overall score and impact the program leaderboard. (We'll talk more about that in the section below about gamification.) Additionally, video testimonials, animation, and case studies support the learning objectives.



Reflection Exercises

Following the eLearning module, learners turn to their participant guide to work on the self-study portion of the journey. They answer self-reflection questions, which take them approximately 30 minutes.

Independently, they evaluate their own—and their teams'—strengths and areas for improvement, and brainstorm ideas for expanding the capabilities of their teams. The result is a workbook of ideas, strategies, and tactical steps to bring back to their team, to increase digital opportunities.



Team Collaboration Sessions

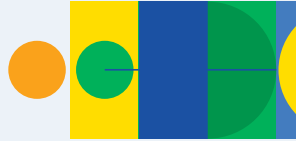
Via WebEx, teams meet during each cycle for a 60-minute social learning collaboration session, designed to foster cross-collaboration and peer-to-peer learning. During this activity, they answer guided questions (moderated by the team leader chosen in the webinar breakout sessions), sharing and brainstorming ideas.



Review, Assessment, and Sharing

Finally, after the collaboration, learners take a 10-minute eLearning-based quiz to validate that they have completed the module and achieved the learning objectives. They also access a program-wide social collaborative learning site (the Digital IQ chat) and post the best ideas they brainstormed within each cycle. This increases cross-collaboration and sharing of ideas from all teams, across cohorts! Points are earned from both activities.

The Visual Map— Your Journey Begins Here!



Pfizer's Digital IQ journey map is a great example of a learning journey visualization. Why create a visual map for your virtual learning journey? In addition to showing off your expertly designed learner's journey, the map can be a great resource for everyone who touches the program.

Internal Design Team

The map is a valuable tool to help the team visualize all the different parts and pieces that make up the program and how they all connect together. This is especially helpful if you are creating a blended learning curriculum that is composed of different modalities, like Digital IQ, as it will help you all stay aligned during construction.

Stakeholders

Visual maps are a great tool to help communicate your design vision with stakeholders. They are especially helpful when the program is complicated or includes content for different audiences. You can use the map to illustrate where the different learners' journeys intersect, and where and how they differ. You can also call out any touchpoints or other areas that require the client's input or interaction with the learner.

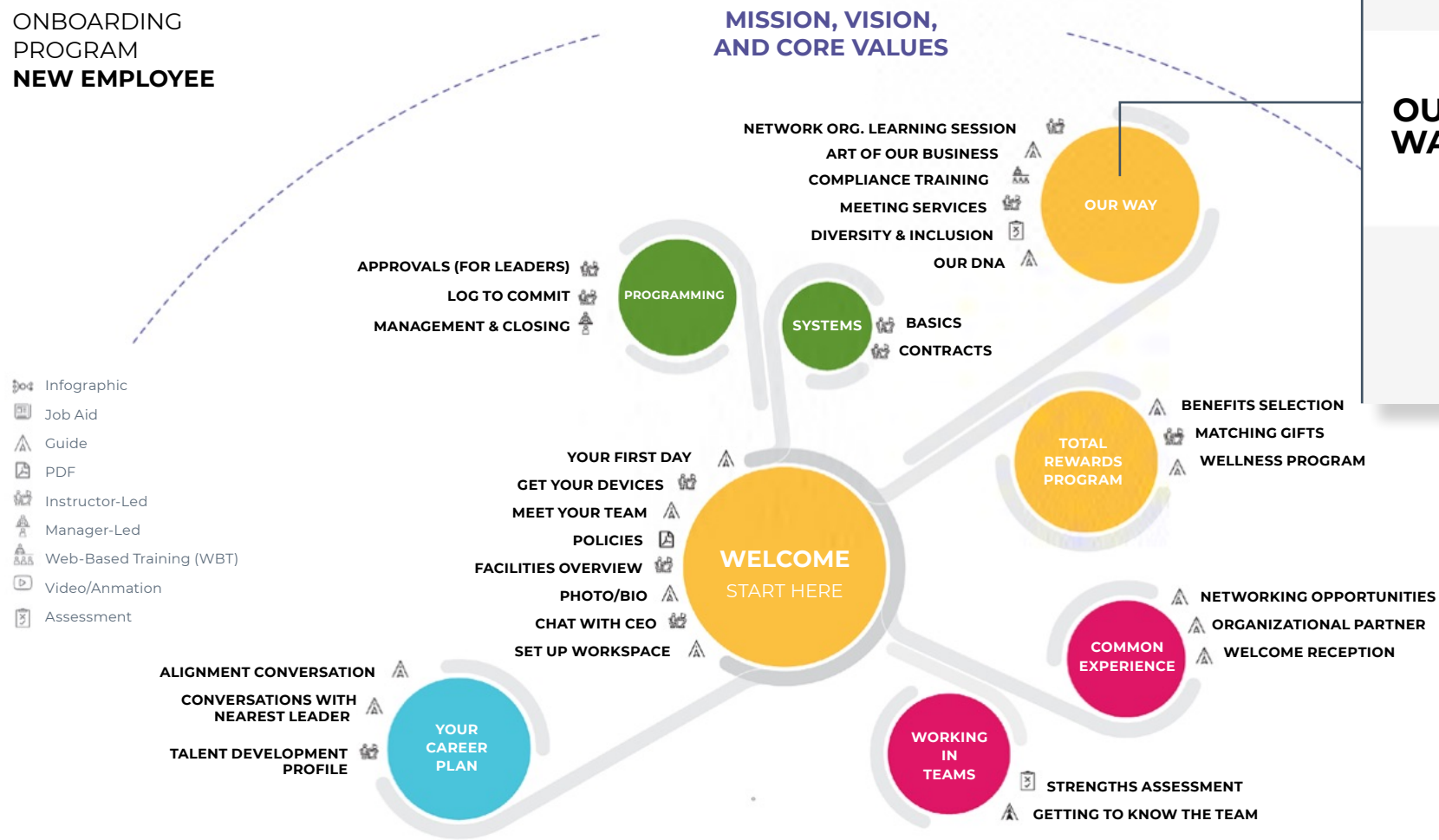
Learners

Visual maps are extremely beneficial for learners; maps help show them what their journey looks like and where they are at any given moment on the journey ("You are here"). Journey maps can be designed to show how pieces of content or topics build upon or connect to each other (also known as a schema), which can help with cognitive load. When people can make connections around what they are learning, it makes it easier to learn.



The Visual Journey Map: Another Example

ONBOARDING PROGRAM NEW EMPLOYEE



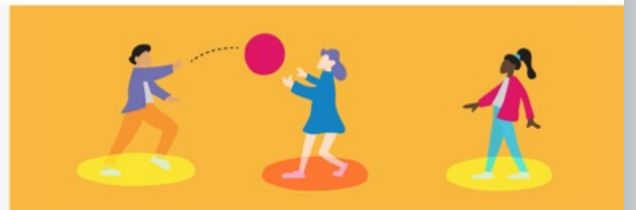
OUR WAY

Network Org. Learning Session

An introduction to working in a networked organization, including principles and guidelines, will take place within your first two weeks of hire.

Compliance Training

At different times throughout your first 6 months of hire, you will complete a series of mandatory trainings that include courses in Civil Treatment for Employees/Leaders, Learn Foundation Law, Ethics & Conflict of Interest and HIPAA.



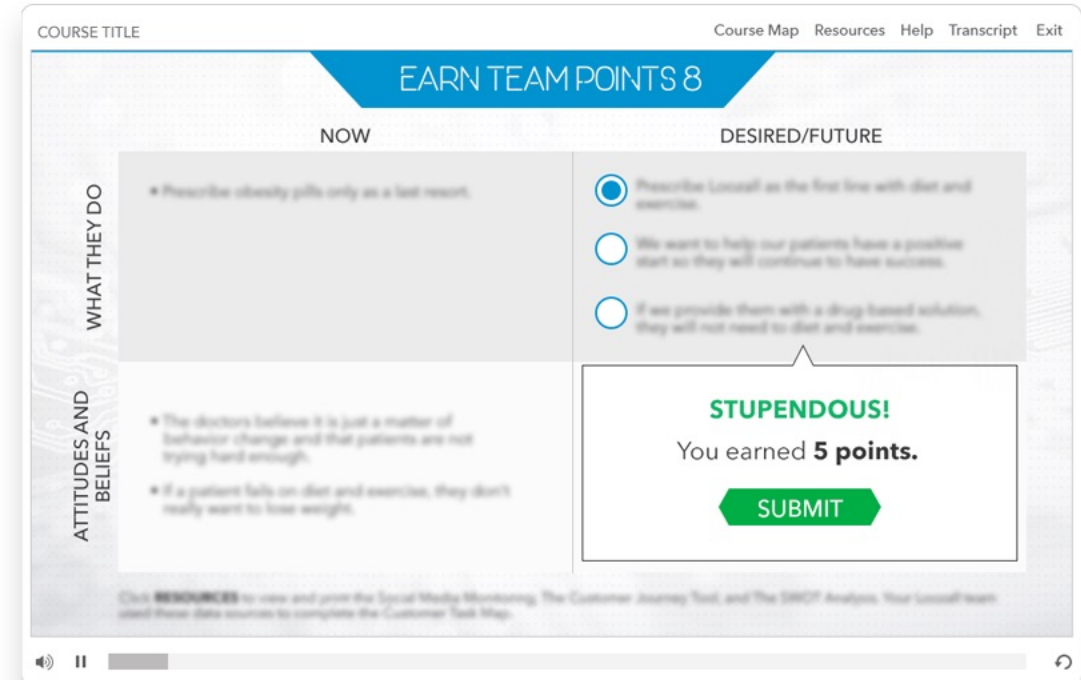
This visual map has more to it than meets the eye. Hidden interactive content—which is accessed by clicking the circles—reveals a detailed breakdown of what the learners can expect to experience during each stage of their journey. From the people they will meet and interact with to the tasks they will need to complete on their own, this map literally leads the way.



Gamification:

Harnessing Competition for Motivation

In transforming Digital IQ from a classroom to a virtual learning experience, retaining the creativity and engagement factor that made the classroom version successful was essential.



In one activity learners earn points for answering questions correctly within the eLearning and reviews, which then roll up to their team.

To increase the fun factor and motivation, gamification and competition were incorporated into the virtual learning journey, so learners performed at their best every step of the way. **These techniques also increased the accountability of team members to each other.**



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DIGITAL IQ - LEADERBOARD					
ACTIVE COHORT					
NAME OF THE COHORT					
POSITION	TEAM	ROUND 1	ROUND 2	ROUND 3	TOTAL
01	DigOlympians	90	141	76	307
02	Digital-The Front	85	159	58	303
03	Dare 2 Do Digital	87	136	72	295
04	Share is Care	84	60	29	174

The Leaderboard is updated in real time so learners can check their team's current standings.

During each social collaboration meeting, teams check their scores and the leaderboard to see how they are performing, compared to the other teams.

Digital IQ— First-of-Its-Kind and a Great Success!

Initially there were concerns about shifting the program from a live, classroom-based experience to a virtual one, but this innovative approach retains and improves upon the excitement, collaboration, and engagement in the original, while being more scalable, cost-effective, and flexible for Pfizer's global audience.

And the response from learners has been tremendously positive, including comments like this from learners: ***"This is the best eLearning I've ever taken at Pfizer!"***



Top Three Tips for Optimizing the Learner's Journey



If you are new to the world of learners' journeys, you might be wondering how to get started. Fortunately, it's actually easier than you might think!

Here are Clare's top three tips for optimizing the learner's journey within your program design.

Tip #1: Talk to the learners.

To design an optimal learner's journey, it is critical to have a strong sense of who the audience is and what is important to them. And to do that, you need to talk to them! According to Clare: "You don't need to speak to all of the learners, a representative sample will do. But if you don't speak to any learners at all, you could risk creating an experience that won't land with your audience."

NOTE: If you are unable to connect with the learners, the next best option will be to talk with people who have access to the learners, and who know what they do and how they do it. While these people are not the actual learners, they should be able to offer insights and considerations.

Tip #2: Listen to the learners.

When you get to speak to learners, make sure you actually listen to them. They should be the ones doing most of the talking, and you should be doing all of the listening. Dial up the empathy, ask lots of open-ended

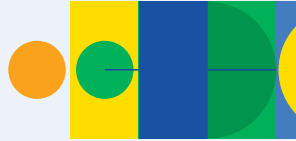
questions, and set your active listening skills to 10! Remember, we want to optimize the learner's journey, and who better to define that for us than the learners themselves?

Tip #3: Consider the learning administrator's needs too.

We've talked a lot about ensuring that the learner's needs are heard and met, but it is also critical to make sure your learner's journey design can be managed by the program's administrators. Clare notes, "Breaking the curriculum down into really small chunks might be ideal for the learner, but how easy or difficult will it be to manage from a logistical standpoint?" This was a critical part of Digital IQ—GMET is not a large team, and they needed to be able to administer the program with ease.

When you are designing a learner's journey, you're looking for that sweet spot, where both parties are happy! How do you find it, you ask? You need to talk and listen to the program administrators, as well as the learners! Make sure you understand all of the administrative and logistical constraints and preferences, and use those—along with your learners' insights—to inform your design.

Evaluating the Learner's Journey



As with all good program design, you need to take into consideration how you will evaluate the learner's journey *during* the design phase. How do you go about building an evaluation for a learner's journey, and what should it include?

You will need to approach the evaluation in two ways:

- 1. Evaluate the learning outcomes:** The approach here is going to be the same for any other program design. You'll need to select the most appropriate evaluation tool for each piece of content that is included in your learner's journey. If your content includes both knowledge- and performance-level learning objectives, you'll need to create both Level 2 and Level 3 evaluations to accompany them.
- 2. Evaluate the learner's experience:** When it comes to evaluating the learner's journey, what we really want to know is, "How was it for you?" We would recommend using a level one assessment to do this. When done well, the level one evaluation can yield valuable insights that will help you further optimize your design. Clare's advice is: "Take your time and prepare questions that require the learner to provide a detailed response. Avoid ratings-based questions, and try not to create leading questions that are likely to generate a specific response."



What we want to understand is how learners feel while they are going through the content and how we can make it the best experience—that is, best for the learner—every step of the way.

— Clare Dygert, SweetRush Director of Instructional Design

Key Takeaways

- 1 Shift how you think about learning journeys. Rather than focusing a map with a start and end point, think about the learner's journey—in other words, the learner's experience. Envision the journey not as a series of stops, but as an overall adventure!
- 2 Spend time talking to your target audience(s) and really listening to what it is they are hoping to see, do, and experience on their learning journey. Find out how, when, and where they like to consume learning, and create a solution that will work best for them. Try not to make any assumptions on their behalf.
- 3 Consult with the program's administrators to make sure that what you are designing can be easily implemented and maintained. Find the sweet spot: a learning experience that is both meaningful and manageable.
- 4 Visual maps can help you gain alignment (with your design and development team) and buy-in (with your stakeholders). The map is also an invaluable tool for your learners to set expectations and connect the dots between where they have been and where they are going.
- 5 As with all journeys, there can be the occasional bump in the road. Be sure to actively seek out feedback from your learners on their experience (as opposed to the content, which you'll evaluate in the usual way), and make adjustments and course corrections as needed.

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Thank You for Reading Our Stories

We hope you're leaving with a spark of inspiration (or two).

Having been at SweetRush for more than 16 years, I know there are so many more stories to tell. I have my own from when I started as a Project Manager and then moved on to become a Solution Architect. But when I started the marketing team six years ago, I found myself in the fortunate position of being a collector of stories across SweetRush. And it was a lot of fun to dig deeper into these case studies and interview the teams. I'm grateful for their contributions so we can share them with you.

I couldn't be more proud of the organizations we choose to work with and the positive impact that we make through those partnerships. Last year we articulated our "BHAG" (Big Hairy Audacious Goal): to positively impact the lives of a billion people. The companies and organizations we work for are made up of people, and whether it's improving people's careers and lives or supporting the missions of over 30 nonprofits and foundations, being in the field of learning is our meaning and purpose, as I'm sure it is for you, too.

Please reach out anytime if I—or the SweetRush team—can help you on your path to create exceptional, learner-centric virtual training. I'd love to hear any feedback you have on this eBook or to learn about other topics that are of interest to you. And if we can be of service in partnering with you and your organization, don't hesitate to reach out. It would make my day—our day—to hear from you.

With gratitude,



Danielle Hart, SweetRush Director of Marketing

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In Our Clients' Words

SweetRush's ability to creatively problem solve, brainstorm, adjust, and find new solutions was amazing. Also, the team's consistent, deep engagement, throughout and then leading up to the launch—getting all the last details right and going the extra mile—was exceptional.

—Global social justice foundation

Our team always felt an intense collaborative spirit when working alongside SweetRush...Their attention to detail within every component that was created made a world of difference, and truly understanding our audience led to the successful creation of a product we are proud to have built.

—Silicon Valley innovator

The company and staff are highly innovative and collaborative. They bring together a specialized team for each project, a team that collaborates throughout the project.

—Global health care NGO

SweetRush has been an amazing partner! Everyone we have worked with over the last year and a half has been open, honest, fun, respectful, creative, flexible...I could go on and on! We were looking for a new partnership, and we are so glad we found that with SweetRush.

—Global supermarket and specialty retailer

Empower Your People. Improve Performance. Make a Positive Impact.

WITH A COLLABORATIVE, INNOVATIVE PARTNER YOU CAN TRUST



CUSTOM LEARNING

Bespoke solutions designed to motivate, build skills, and change behavior. Give us the opportunity to show you why we're judged the best.



SPARK

VR, AR, immersive learning. A new world of opportunity. Curious? Confused? Let us be your guide and show you how these technologies can work for you.



TALENT SOLUTIONS

Need temporary talent? We understand your needs and can quickly match you with the right L&D professional—because we do this work, too.



thrive BY SWEETRUSH

Investing in our culture has been the secret to our success. Discover how we can help you create high-performing leaders and teams.



GOOD THINGS

Nonprofits, we stand in awe of what you do. Let us show you how learning and communication can amplify your impact.



High-impact, complex challenge? Talk to us about CoDesign, our design thinking process. (It's disruptive.)

Get in touch. It would make our day to hear from you.

www.sweetrush.com info@sweetrush.com



Virtual Training, SweetRush Style

5 Case Studies
to Inspire a Learner-Centered Approach

- 1 Rapid Development with NETEC
- 2 The Design Thinking Revolution with NYSPPC and CoDesign
- 3 Diversity & Inclusion with USCF
- 4 Creative Storytelling & Scenario-Based Learning with SHRM
- 5 Virtual Learning Journey with Pfizer

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