When it comes to developing training programs, user experience is a significant factor.

Revelations About Experience Design

BY BRANDON DICKENS

Learning professionals are becoming ever more focused on experience design—that is, designing their training and learning programs to make them more user-friendly, accessible, and appealing to the end user. Given the many demands and directions L&D professionals are being pulled in, this isn't necessarily easy—even while we know that the learners need us to be their advocates. Given that I am a creative writer who became a learning designer, people often ask me about my transition into large-scale learning consultation; I now run a global team of user experience professionals for NIIT, a large learning outsourcing company. Here are several revelations I discovered along the way for developing effective experience designs.

We make bad goals that don't work hard enough for us

A big part of my job is, and has been for some time now, crafting responses to client needs, often expressed through requests for proposals. These requests are generally motivated by straightforward business goals such as reducing training time, decreasing travel requirements, increasing close rates in a sales audience, or reducing deaths from accidents in an industrial setting. But these are preludes to measurement strategies and will not do what a goal really should: inform all the minute decisions you need to make to build a breathtaking experience.

A little more than 10 years ago, I received an RFP that was motivated by something different: The global head of learning for a global quick-serve restaurant, in a personalized letter, asked for a training strategy that would make employees look forward to their next training as much as they looked forward to their next paycheck. After struggling and failing to make one of my standard responses fit, I went to the library and dug in, happening upon a copy of *About Face* by Alan Cooper. In it, Cooper enumerates, among other things, a load of techniques to employ to better understand users and more effectively meet their needs.

I devoured the book over a weekend and wrote a proposal the next Monday that offered only user research—no concrete training proposals. To my shock, the company accepted the proposal, and I worked out, in real time, a first draft of the user-focused training methodology that I still use today. That methodology's starting point is a bold goal that describes how you want your users to feel. Treat your goal statement as a vehicle for emotional content, one that will help unify and inform complex design decisions across the solution. A goal that is not a call to arms is a bad goal.

We don't know who our learners really are

I see briefs for almost 100 projects each year across a wide range of industries. Each attempts to capture what the target audience does on a day-to-day basis. These briefs, invariably, focus on factors such as tenure, demographics, and job descriptions. Those details can be somewhat useful in informing certain details of a learning product, such as the tone and formality of the writing and the level of complexity of topics to cover. But that level of detail does not get you far.

Years ago, my team and I worked on a project with a large insurance company that wanted to dramatically overhaul its learning experience. As part of the project, we completed an extensive analysis that involved telephone interviews and real-world observation of people in the training audience. The group included high- and low-performing representatives of roles involved in restaurant training, such as trainees, their managers, and senior executives. We recorded everything so that others further downstream would have the benefit of the original data we used to determine the high-level curriculum architecture.

My office, located just outside of Chicago, Illinois, has access to a robust creative talent market. As part of an experiment, we brought in some practicing improv comics from well-known stand-up troops. When we started the writing process, the new improv recruits asked questions that aren't standard in the learning world. One that sticks out: "What bumper stickers are on their cars?" The key here is not the specific questions but the mindset these improv comics brought to the task. They are trained to suck up every ounce of personality from people they meet and then act as that personality on stage to general comic effect.

To create engaging training, you need to adopt a similar mindset. You must understand your audience well enough to write them into courses and give them resonant touchstones.

Since that project, I start the writing phase of most of my projects with a character bible, which is an incredibly detailed set of user personas that serve several critical purposes. First, they are a vehicle that helps all team members—programmers, writers, artists, media personnel, user experience individuals, and others—maintain laser focus on the audience you're trying to help via the learning product. Second, these personas become characters that you can easily drop into complex training scenarios, giving reality and lending an engaging element to courseware.

Lots of training is irrelevant to the user's real life

I worked with a Fortune 100 consumer goods company that approached NIIT to help it redesign its level 1 compliance training. The firm had already completed a yearlong analysis and had discovered that its learners hated compliance training. That, of course, didn't surprise me or my team.

We dug into the organization's research and found several oddities. First, it had an audience of roughly 350,000 employees, all of whom were required to sit through around 17 hours of mandatory compliance training. Quick math suggests

the cost of this training, in terms of productivity taken from the business, was greater than $500 million a year—a truly staggering number. Second, the study contained a free-form entry asking learners to describe their feelings about the training. We ran those entries through a piece of word cloud software and found that the three most commonly used descriptors were *irrelevant, boring,* and *long.*

Several of our designers created a simplified heuristic review against a single heuristic: Can the typical users do anything in their real job with this information? The designers reverse engineered scripts for all 17 courses and marked them up with one of two colors. Red meant the learners could not use the information on the job, and green meant the learners could use it on the job. Of the courses, two did not have any green, and the majority had less than 10 percent of information that was relevant to learners' jobs. On average, this meant that a typical user could expect roughly six minutes out of 60 that were relevant to their job task. The client was looking for tricks to make the content more engaging, but the learners were pointing right at the real problem: The training was completely irrelevant.

We rewrote the training, checking each iteration of the outline and script against that one heuristic. The revised compliance curriculums were a little more than one hour of training in total. Each one-hour course came down to 10 minutes or less. Following extensive user surveys, it was clear that users appreciated the laser focus on relevance. That is one of the simplest things you can do to move to a more user-centered design approach.

We think learners want it easy

Years ago, I worked with the CEO of a major for-profit university who was concerned that off-site students' user experience was poor, as evidenced by many dropouts. He brought me in to redesign the entire experience for students, instructors, and administrators. He was enamored with games and gamification

You need to know your learners better than they know themselves.

and had convinced himself that somehow, somewhere the secret to happy students who stick around long enough to finish degrees could be found in the game designer's dark magic.

Although I wanted to get my hands on some real end users, that was a sensitive request at the time—the U.S. Department of Justice and the U.S. Department of Education were both investigating for-profit universities, and discussions with students could come with significant exposure. Instead, I did an extensive heuristic review of the school's existing user experience, including all the content students consumed and the tests they took. I started with a math course that had the highest drop rate.

The course included two solid weeks of reading before the students were asked to do anything meaningful. Even then, the requests were largely superficial filling out of formulae, not meaningful interaction. In a word, the course was easy.

I put together an example math curriculum, along with an app to deliver the content and some class engagement pieces, such as forums. The solution's core was an interactive story-based game that asked learners to adopt the persona of an eccentric robotics engineer who was setting up a factory. Each week, students would receive a series of logistical challenges that they could solve mathematically; by doing so, they'd see progress reflected in their virtual business. The factory would be built, production would increase, their avatar would become visibly wealthier, and so forth. The design approach was for users to learn by doing.

I presented this to the head of curriculum, the key stakeholder, and the CEO. The CEO loved the idea, cost concerns aside. The curriculum head said, "That's too hard—our students will never get it. They're not smart."

The problem with this thinking is that it's self-perpetuating: People do not learn or engage without a challenge. By keeping the difficult material for "smart" people, the individuals you need to train will never get there, except in spite of you.

Although the curriculum idea was shut down, I have implemented this kind of solution for several clients, with successful results. It turns out that learners think hard is fun—and that's the dark magic of game design.

We take our learners' input at face value

Recently, I worked with a large oil and gas client who wanted to train senior executives on how to handle complex compliance cases. I proposed a serious game that hired learners into a fictional oil and gas company, presented them with realistic executive challenges, and let them try to overcome them. While the design was cool, when I shared the concept with leadership, a senior executive responded flatly, "Yeah, so, executives hate games and we hate technology—this is a terrible idea." I tried my best to bail and to counsel my client away from the entire approach. To my extreme displeasure at the time, they decided to press forward.

The rollout was massively successful. Not only did the senior leaders like the game, they played and replayed it. Word got out, and the training team had to develop a process to enable folks to take compliance training they weren't assigned—people were asking for compliance training.

Many learning professionals go out and ask learners what they want and then implement it. But that's not enough. You need to be hungrier than that. You must know your learners better than they know themselves. In the case of the senior executives who hated games, it turns out that they lacked the motor skills needed to play games using standard gaming controls. Once we figured that out and adjusted for it, they loved games. As an L&D professional, if you're curious enough and work at it, you can give learners so much more than they expect or even can imagine.

Brandon Dickens is head of user experience design for NIIT's corporate learning group; brandon dickens@gmail.com.

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