CINÉCRAFT
PRODUCTIONS

7 BETTER LEARNING PRINCIPLES FOR CUSTOM ELEARNING

ACCESSIBLE

AUTHENTIC

FUN

TIMELY

ENGAGING

RELEVANT

EFFICIENT

A FREE AND USEFUL GUIDE FOR INSTRUCTIONAL DESIGNERS

WRITTEN BY: DAN KECKAN

ABOUT THE AUTHOR

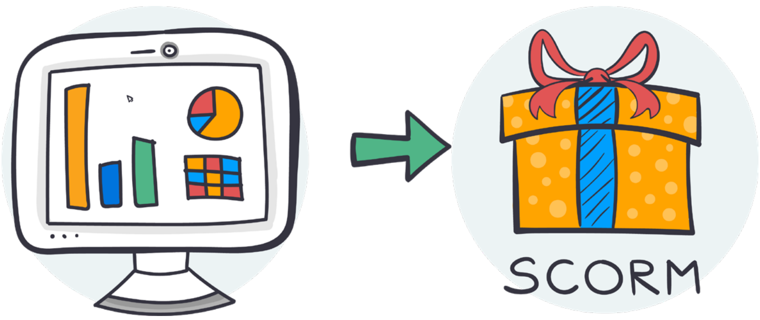
Dan Keckan is CEO at Cinécraft Productions, a custom content learning company that has called Cleveland, Ohio home since 1939. After joining his family business in 1998, he began rebranding the company from a local training video company, to an international custom content learning company. He works with organizations to design and develop learning strategies, and provides thought leadership that achieves measurable business results. His expertise is in matching learning modalities to the actual skill or behavior to be learned. You can often find him at learning conferences speaking on simulation design best-practices and presenting award-winning work. He resides in Rocky River, Ohio with his wife, Kate, and their two children, Mackenna (6) and William (4). Dan is also an avid Cleveland sports and Ohio State Buckeyes fan.

ABOUT CINÉCRAFT PRODUCTIONS

Cinécraft boasts a creative and award-winning staff of 25 employees and dozens more freelancers, including instructional designers, scriptwriters, video editors, project managers, animators, graphic designers & developers. Cinécraft's team of learning professionals works to ensure Cinécraft's customer list of Fortune 1000 organizations are happy with the results, learners enjoy learning and everyone has fun in the process.

INTRODUCTION TO THE 7 BETTER LEARNING PRINCIPLES

There is a large contingent of instructional designers out there who are forced by their organizations' lines of business to take orders and "design" eLearning courses. Stakeholders ask these well-intentioned instructional designers to become order-takers and apply learning objectives, knowledge checks and assessments to their PowerPoints and import them into a Storyline or Captivate published SCORM file. Once it is loaded into the organization's LMS it resides there in a deep blue abyss forever. Did I mention that these projects have a completion deadline of 2-3 weeks? Does this sound like you? It's not your fault. Let me say it again, it's not your fault! After all, you have a backlog of projects and only so many hours in a day to argue the merits of learner-centric and performance-focused eLearning.



In 2014, a team of well-educated and experienced learning professionals got together to create the *Serious eLearning Manifesto.*

They were frustrated with bad elearning that fails to live up to its promise of improving performance and creating measurable results. So they decided to come up with a set of 22 principles that reflect effective performance-focused eLearning that instructional designers should know and use. I'm a signatory and agree with every principle in the manifesto. However, it falls short of being a useful tool that instructional designers can use to evaluate their design throughout the project life cycle and make changes for the better.

There are other tools out there that evaluate the quality of instructional design based on performance-focused and learner-centric standards. Take the Quality Matters Rubric for instance. This tool is very advanced, has quality assurance standards, certification for designers, and even membership opportunities. However, it focuses primarily on academia not industry, it is very rigorous, and it can take almost as much time to evaluate your course than building the actual course. Therefore, I decided to come up with an evaluation tool for my team and I would like to share it with you.

The evaluation tool is called the 7 Better Learning Principles Assessment (of course if someone comes up with a better name, I'm all ears).

These 7 Principles are based on 20 years of designing and reviewing effective and unfortunately ineffective courses. They are also based on other people's research and experience. I would argue that ***cognitive apprenticeship**** is a more effective teaching technique than most other approaches. The technique draws on the theory that a more knowledgeable person engages in a task with a more novice person by describing their own thoughts as they work on a task. Here they provide modeling of behaviors, coaching, scaffolding (where the teacher enables the student to perform the task by gradually shredding away assistance), articulation, reflection, and finally exploration.

Cognitive apprenticeship is not always a cost-effective or timely solution. Just imagine a machine shop supervisor with a single compound die press is tasked with training a team of 6 new employees that work 3 different shifts on 2 different machines. The math for timely or cost-effective training just doesn't work, does it? Therefore, a more sustainable, timely and consistent approach is the benefit of applying the 7 Better Learning Principles to custom eLearning courses. These principles' have attributes that are defined by their effectiveness in learning.

HERE ARE THE 7 BETTER LEARNING PRINCIPLES AND THEIR KEY PERFORMANCE-FOCUSED ATTRIBUTES:

01 AUTHENTIC
Design is genuine, real, life-like, accurate and offers an opportunity for reflection and exploration.

02 TIMELY
Convenient, made available at a favorable or useful time.

03 RELEVANT
Learning is closely connected to the business needs and learning objectives.

04 EFFICIENT
Content is streamlined, well organized and minimizes learners' effort.

05 ENGAGING
Create learning that activates learners' curiosity rather than providing meaningless clicks.

06 FUN
Delivery is entertaining, amusing and enjoyable.

07 ACCESSIBLE
Content is easy to understand without obstacles and is attainable.

In articles to come, I will take a deeper dive into each of these principles and their attributes, and provide examples of compliance as well as noncompliance.

My goal is to try and quantify and provide better feedback to you, and provide a tool you can use with your stakeholders to hopefully give merit to the argument for better learning on their next project.

-Daniel Keckan

***Collins, A., Brown, J. S., & Newman, S. E. (1987). Cognitive apprenticeship: Teaching the craft of reading, writing and mathematics (Technical Report No. 403). BBN Laboratories, Cambridge, MA. Centre for the Study of Reading, University of Illinois. January, 1987.**

4 TIPS FOR DESIGNING AUTHENTIC CUSTOM ELEARNING

Sue was excited to start her first day working in a call center for a large online retailer. She has to answer customers' questions and complaints about their orders. During her training she worked through dozens of eLearning modules, simulating conversations with customers. Every possible topic was covered, so she felt super prepared.

But then her first caller was so angry because her order was damaged! She knew the answer, but the person wouldn't listen. The caller hung up on her! This really shook Sue's confidence. She felt so prepared after her training – what was missing?

All the virtual callers in her eLearning modules were polite and well-organized, but unfortunately the real world is much different. Facts alone weren't enough for Sue – she needed to know how to deal with emotions and other difficulties that might arise. She needed training that was more Authentic.

For custom eLearning to be Authentic, both the content and the overall course design must be as close to real life as possible.

Using scenarios and simulations allows learners to build skills through practice while giving them a safe place to make mistakes. With this approach, you can easily weave Authenticity into all aspects of the eLearning – its look, feel, and sound.

To authentically design eLearning courses, you must start early in the project. You'll need to do more analysis up front, discovering your learners' context and goals in detail, then present the content in a realistic way.

In this article, we'll review four key tips that will help you design for Authenticity.

#1 DEFINE WHAT THE LEARNERS NEEDS TO DO!

Let's say you are designing the onboarding curriculum for Sue's department. During your needs analysis, it's critical to identify the tasks and behaviors that successful employees actually perform day-to-day on the job. Brainstorm with your project stakeholders: Is there a written process and related tasks and behaviors? If not, you may need to work with stakeholders and Subject Matter Experts to write one. Unless ideal behaviors and tasks are defined up front, it will be difficult to create a course that benefits the learners and, ultimately, the company.

In Sue's case, it may have benefited her to also engage in simulations that include customer complaints. The complaint handling process may look something like this:

Customer Complaint Behaviors:

1. Listen and understand the customer's issue.
2. Empathize by restating the problem and how it would make you feel.
3. Offer a solution that goes above and beyond the customer's expectations, like a new product to be expedited at no charge and a discount on a future purchase.

4. Confirm that this solution will satisfy the customer's needs.
5. Follow up on the customer's satisfaction once the product has been shipped and delivered.

Note that we're focusing on actions and behaviors, not just information. A truly Authentic eLearning program does not dump information into learners' laps, but rather shows them realistic ways to be successful. They walk away knowing how to "do" the job. To authentically design eLearning courses, you must start early in the project. You'll need to do more analysis up front, discovering your learners' context and goals in detail, then present the content in a realistic way. While Sue's training included many simulations they failed to be truly Authentic.

#2 SPEND TIME WITH YOUR LEARNERS ON-THE-JOB

Once you have a detailed description of the learners' ideal behaviors, the next step in designing Authentic custom eLearning is to understand how these tasks are done in the real world.

You might visit the call center to observe or interview current high performers on the job. What does their "reality" look like? What behaviors are they not comfortable performing and why? What environment are they in as they perform tasks that consume approximately 80% of their day? For a call center, another strategy for observation would be to listen to recorded calls. Audio or video recordings are an excellent resource. They help to illustrate Authentic scenarios to help with your writing process.

And they also help you to identify correct and incorrect behaviors and tasks.

Finally, take photographs of the workplace and leverage them to design your custom eLearning interface as a realistic environment. By putting the learners into the space where they will perform their jobs, you can achieve visual Authenticity that's aligned with your content. If you find that learners like Sue are in a cubicle with job aids and lists on the walls, make your interface look like that!

#3 GET REAL-WORLD SITUATIONS

If we over-focus on ideal behaviors, we may end up creating training with the same gaps experienced by Sue from our story. Authentic custom eLearning courses address not just what can go right, but what can go wrong. How often do exceptions arise, and what are the exceptions? What distractions and challenges do these learners routinely face, and why?

One tool for gathering this source information is a scenario grid.

Question to Answer	Mistake #1	Mistake #2
What are the top 2 mistakes people make?	**Jump right to a solution and don't properly empathize with the customer's pain.**	**They don't offer a solution that goes above and beyond the customer's expectations.**

With the scenario grid, your Subject Matter Experts (SMEs) construct most of the stories for you. For each target task and behavior, the grid provides space where they describe common incorrect behaviors or tasks that you want to change and the potential consequences of those mistakes. These behaviors or tasks become the incorrect answer choices in your simulations and scenarios.

Remember our ideal tasks and behaviors? Let’s see what a scenario grid might look like.

Task: Greet the customer with a warm welcome

Question to Answer	Mistake #1	Mistake #2
What are the top 2 mistakes people make?	Jump right to a solution and don't properly empathize with the customer's pain.	They don't offer a solution that goes above and beyond the customer's expectations.
What should they do instead?	Say, "I can understand how receiving a broken product is frustrating."	Say, "Would you mind shipping back the item, free of charge? In the meantime we will expedite you a new product. And, we'd like to offer you 25% off on your next purchase to retain your loyalty."
Why do people make this mistake?	They just want to solve the problem as soon as possible without worrying about the customer's feelings.	They don't feel empowered to offer solutions that go above and beyond.
How can this mistake negatively affect the individual or the company?	If you don't empathize you miss an important step in satisfying the customer's frustration. Frustration is a feeling and should be nullified before a solution is presented.	If you don't go above and beyond the customer still feels slighted. They've wasted their time, and their time is worth something.

From the scenario grid, your first simulation or scenario question could look like this:

Jane, a longtime customer, is calling in to complain that the product she ordered arrived damaged. How should you respond to the customer's complaint?

A **“Jane, I can understand how receiving a broken product is frustrating. Would you mind shipping back the item, free of charge? In the meantime we will expedite you a new product. And, we'd like to offer you 25% off on your next purchase to retain your loyalty." [Ideal behavior]**

B "I'm sorry, those shipping companies don't show any concern when tossing around boxes in the truck. Would you mind shipping back the item, free of charge? In the meantime we will expedite you a new product. And, we'd like to offer you 25% off on your next purchase to retain your loyalty." **[Mistake #1]**

C “Jane, I can understand how receiving a broken product is frustrating. Would you mind shipping back the item? Once we receive it we will send you a new product.” **[Mistake #2]**

The purpose of including plausible wrong answers isn’t to trick learners into picking wrong responses, but rather show them what the consequences of those choices may be – so they learn from their own mistakes. Be careful to avoid using answer choices that are obviously wrong. These red herrings are not Authentic or behavior-changing. They’re just distracting.

A scenario grid is not only simple and powerful, it’s also flexible: your SMEs can complete it on their own, or you can use it during project meetings to guide the discussion.

#4 DITCH REINFORCEMENT FEEDBACK IN FAVOR OF CORRECTIVE FEEDBACK

This tip may seem unusual at first, but let's peek under the surface for a moment.

When Sue is working in the call center and answers a customer's question correctly, will a cheerful voice immediately tell her, "Good job!"? Not likely. What will happen is that she'll move on to her next task.

Our goal is Authentic training – as close to real life as possible. We want to keep the learners in the flow of the simulation or scenario, not pull them out of it. For adult learners, reinforcement feedback can seem like an interruption that only serves to slow the training down.

Instead, keep things moving by only providing feedback for incorrect responses. Information from your scenario grid enables you to focus on the potential consequences of mistakes: what would have happened on the job. Experience teaches the learners that, while the answer they chose was tempting, it was not the best way to perform their job.

Adult learners may think they know all the answers, but everyone learns best from their own mistakes.

REMEMBER...

Authentic custom eLearning keeps the learning experience as close to real life as possible. To achieve this goal, work with SMEs and high performers to define objectives, behaviors, tasks and performance gaps and to replicate the workplace in the course interface. To easily uncover stories for simulations and scenarios, use a scenario grid. Finally, use corrective feedback wisely so that it doesn't pull the learners out of the training.

With these 4 tips, you're on your way to designing an Authentic custom eLearning course. With anything less, your learners may disengage or, even worse, not demonstrate the appropriate behaviors and tasks when they need them the most, on the job.

WHY IT IS IMPORTANT FOR L&D MANAGERS TO DESIGN TIMELY CUSTOM ELEARNING SOLUTIONS

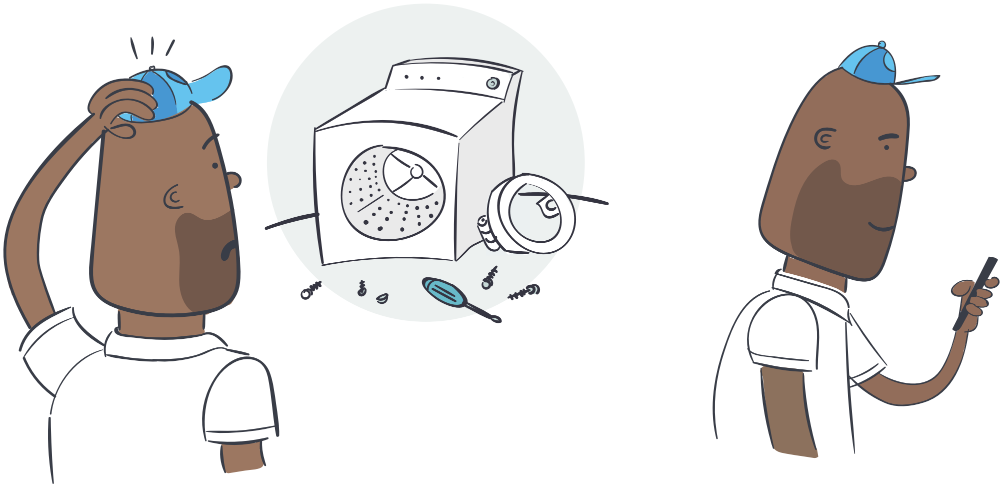
Devon recently graduated from vocational school and landed his first "real" job – he's a field service technician for a home appliance company.

Devon's new employer provided him with a phased onboarding experience. The first 2 months, he completed eLearning courses to gain foundational knowledge on all of the company's products. He also spent time studying a 100-page technical manual.

Then, he was paired with a seasoned technician, Ted, and shadowed him in the field for 4 months. After his 6 months of onboarding, he was ready to complete service calls on his own!

Devon shows up for his first repair on a BR54-9 dryer. He only helped Ted make repairs on this model twice. He can't remember where to start!

His training covered this, but there were a lot of details. If he starts paging through the reference manual or calls for help, it's going to take longer to finish the repair.



No matter how good Devon's initial training was, he will need guidance or additional information to do the job right - at least until he becomes more comfortable in his role.

This is where Timely resources come into play.

Remember the theory of cognitive apprenticeship, especially the idea of scaffolding? The key is to gradually take away assistance until Devon can complete the task on his own.

Scaffolding in the form of performance support resources will help Devon build expertise and confidence over time, bridging the gap between onboarding and full competence on the job.

TIMELY = CONVENIENT

Timely learning is about resources that learners can conveniently access at their moment of need.

This shouldn't surprise us, since it's the same strategy we use in our personal lives: If your clothes dryer just stopped working, and if you're like most people, you'd go online and look for DIY videos. The videos are a quick and convenient way to investigate whether you, a novice, can solve the problem yourself, or whether you need to make a call to someone like Devon.

For Devon, he needs Timely performance support that will allow him to continue to learn in the flow of his daily work, especially on service calls.

YOU HAVE EVERYTHING YOU NEED ALREADY!

Does this sound like a daunting task? It doesn't have to be. In fact, you might already have Timely resources for your learners – you just need to use what you have in new and different ways.

Let's review some examples from our story to illustrate how this might work.

To help Devon be more efficient, a new section at the front of the manual could provide overviews of frequent customer issues and how to solve them. This content already exists, right there in the manual, but now it's much easier for inexperienced technicians to find. How would you determine what to include? One great approach is to get input from experienced service technicians, and also to analyze repair orders from the past few months.

Here's another idea: The same frequently oft-used existing content could be repurposed as a series of quick reference PDF's. These might be housed in the service tech's service application on their smartphone or tablet.

Remember that one-hour eLearning course? Why not break it up into several micro-courses, by topic? The breakdown may be right there in the course's table of contents or menu bar! These shorter courses make the content more manageable and easier to reference in the future, which is fantastic for scaffolding.

For example, Devon could have used a short video called:

"Getting started with the BR54-9 dryer." Then he could choose from troubleshooting topics like, *"Dryer isn't getting hot," "Dryer is not completing a cycle,"* etc.

Another approach would be to leverage the eLearning course to write scripts for short videos where an experienced technician troubleshoots common issues, fixes them, and shares their own tips and tricks. You could even mount a camera on the technician so that you can see their hands moving and learners feel like they're watching the repair in real time. New hires benefit from the real-world experience of their peers, and current high performers get a chance to shine.

There's another Timely benefit with this instructional design strategy: Each resource you develop is smaller or shorter, which can reduce development time and the time to publish – new training needs can be addressed much more quickly than with traditional hour-long eLearning courses.

Any and all of these methods will bring training resources to employees when they need them – that's the definition of Timely.

LET'S BE TIMELY, ALL THE TIME.

Whether you're just getting started on a new custom eLearning solution, or repurposing your existing resources to make them more Timely, ask yourself "How can I provide this learning as close to the time they need it as possible?"

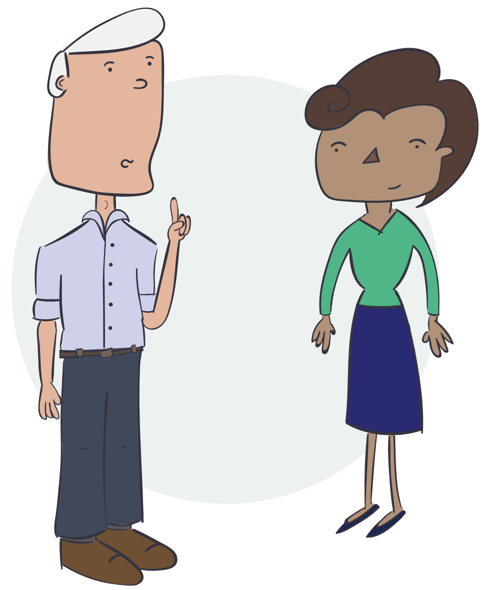
Think big picture: See the learning as a curriculum or library of resources, delivered on demand, rather than a one-time training event. Deploying resources that employees can seek and find and use on a smartphone or tablet when they need it in the field will reinforce what they've already learned and lead to performance gains.

By keeping Timeliness in mind, you'll be crafting learning experiences for employees that support them during their formal training and also on the job.

HOW L&D MANAGERS CAN IMPACT LEARNERS WITH RELEVANT CUSTOM ELEARNING SOLUTIONS

Marcus is creating a custom eLearning course on a new sales order system, for inside sales representatives who process incoming orders.

Julia: "Let's include as much as possible."



Marcus: "On second thought, I think we should narrow it down to exactly what we need."

The project's primary stakeholder and Subject Matter Expert (SME), Julia, is very engaged and enthusiastic about the training – that's the good news. The challenge is that Julia wants the course to include a narrative of the history of the system, detailed descriptions of all the reports that managers can run, and a schematic of how the sales order system integrates with the company's other enterprise software.

Should Marcus do what Julia wants? If not, why not?

What learners need – and what Marcus needs to put in his course – is content that is Relevant.

RELEVANCE, GOALS, AND OBJECTIVES - OH MY!

Marcus started to gather as much information as he could at the start of this project. He interviewed Julia, observed inside sales representatives, and discussed the features of the new system with IT so that he could design an Authentic custom eLearning course.

Marcus had so much - maybe even too much - information! How should he figure out if certain content is Relevant?

Marcus needs to start with the business goal:
Increase productivity and decrease data entry errors in the new sales order system

Then, write the learning objectives:

1. Access and navigate the sales order system
2. Create and modify sales order records

Anything that doesn't directly support **both** of these should not have **any** screen time in his course.

Will a history of the system help learners to achieve these objectives? Unlikely. Nor will database schematics or reports that only managers can run.

Marcus needs to ask himself, "If this particular piece of information isn't in the course, will it impact learners' job performance? Is it really Relevant, just nice-to-know, or something that no one will really care about?" He needs to ask Julia, "Do you need this history of the sales order system, or do you want to keep this history of the sales order system?" If she needs it then, by golly, keep it in there. But if Julia wants it because it makes her feel more complete then kindly ask her to throw it in the trash.

Sometimes there are topics that seem interesting or even essential to project stakeholders, like Julia, but they don't actually help learners perform on the job. And, if Marcus is unsure about a topic, he should ask an inside sales representative who is successful in the role.

THE MORE THEY KNOW, THE LESS YOU HAVE TO TELL THEM...

At the start of the project, Julia told Marcus that she wants to train to the "lowest common denominator," i.e. a new hire in the inside sales department. However, Marcus knows that this group typically has low turnover, so only about 10% of the group is new.

If turnover is low, why base the training only on new hires? Marcus and Julia should consider the majority of the audience's prior knowledge.

If they're concerned about training new hires with little experience, they could provide a separate onboarding course or video that provides the learners with an "understanding" of how the sales order system supports them in their role. I won't get into a detailed discussion of Bloom's Taxonomy Verbs, but we all know that "understand" is not on the list due to the fact it lacks an actionable, measurable or specific outcome.

Experienced inside sales representatives will have this context already - and will have worked in the sales order system before. Marcus should do an analysis of the previous system's configuration vs. the new system to see how much the processes and procedures differ. If the processes are similar in the new system, learners may be able to perform the tasks with the help of a job aid. If not, they may just need quick screenshot tutorials for performance support. But, Marcus must not forget about the 10%. Marcus can serve these new recruits as will by designing scenarios that can either be practiced in an eLearning simulation or even in the sales order system's test environment with the help of a supervisor.

WHATEVER JULIA WANTS, JULIA GETS. RIGHT?

What if Marcus does an audience analysis, gathers content, and makes a recommendation that's tied to the business goals and learning objectives, only to be vetoed by Julia? She still feels strongly that all learners need to know the system history and how to run reports. Julia is the system owner, after all.

Maybe there's a compromise? Marcus should have a discussion with her about the minimum information needed for learners to perform their regular tasks in the sales order system. He can offer to include information that is needed on occasion or in special circumstances in a job aid or other quick reference resource. This way, the learners are only required to take the Relevant content, and everything that's "nice-to-know" is readily available.

Creating a Relevant custom eLearning solution really boils down to three tasks:

1. Identify the business goal.
2. Write learning objectives to support this goal.
3. Analyze your content and narrow it down based on what the learners actually need to be able to do on-the-job.

Relevant content offers more benefits than just motivating your learners – it provides a training experience that targets measurable results and doesn't waste the learners' time with unnecessary information.

HOW DO YOU DESIGN AN EFFICIENT ELEARNING COURSE?

James and the L&D team are having a celebratory lunch! They successfully converted their 3-day instructor-led manager onboarding program into a custom eLearning curriculum. This project will save the company so much time and money. And it wasn't even that difficult to complete. All the content was already in the Powerpoints, so they just had to convert it to eLearning. Everyone gives themselves a pat on the back!

Meanwhile, at a store in the Bronx, NY…

Rosa was just promoted to an assistant manager position and now has a team of 9 sales associates reporting to her. Go Rosa!

She's excited to lead the team and achieve even greater sales results for the store. Her first day on the job, she's assigned her "Manager Learning Path" in the company's LMS. She's astounded when she sees a list of 15 one-hour eLearning courses! And she has to complete them in the next 30 days!

Rosa's time is valuable.

So why did James and his team design and implement this program with little consideration for her time? They took the path of least resistance - it was Efficient for them, rather than Efficient for Rosa.

IT'S MORE WORK TO BE EFFICIENT? SAY WHAT?

It may sound counter-intuitive, but designing Efficient learning is more work. It's easier to make a course that has everything but the kitchen sink, like James' team who just took the instructor-led PowerPoints and added voiceover. To create a streamlined and well-organized course, James' team needed to consider how to achieve the business goal in the least amount of time for the learners.

Let's take one of the many courses in the onboarding program, "Coaching Sales Associates," as an example. Last year, James' company launched a new sales training program to all 50,000 store associates worldwide. The course was initially a huge success, but it seems that some associates are slipping into their old habits of not asking customers if they would like to purchase additional items. If motivation and training are not the answer, I think we might all agree that effective coaching may help to re-engage associates.

Let's assume that the organization adopts one of the many models out there in the marketplace. The L&D department identifies the objectives as:

- **State the purpose of your discussion:** "I was hoping we could briefly discuss your performance around the customer that purchased the widget earlier today."
- **Ask the associate their perception:** "Tell me about the customer experience."

- **Describe what the associate did well:** “I observed the customer experience and you did a great job of asking questions and describing the features and benefits of the widget. In fact they purchased the widget. Great job!”
- **Describe opportunities for improvement:** “You know we are making a more concerted effort at offering customers accessory widgets to enhance the widget they bought? What can we do to make sure you offer accessory widgets with every customer? It will help us increase sales and really help our bottom line.”

- **Set a time and date to follow up on progress:** “I’m glad we came to an agreement on a plan for you to increase your accessory widget sales. When can we follow up and have a brief discussion to see how you’re progressing?”

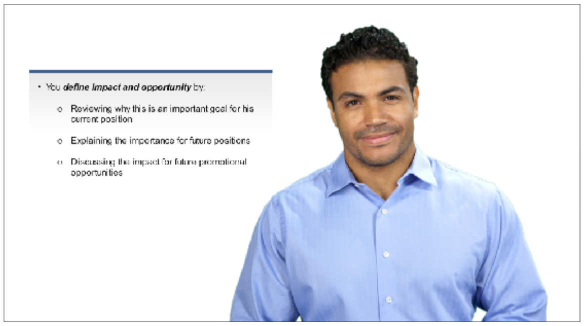
If these are the objectives, does a 1-hour level 2 eLearning course describing, defining and providing examples of the organization’s strategy help a manager like Rosa coach her team?

Nope. You need Rosa to ***coach***, not just define the process.

HOW CAN JAMES FIX IT?

The key is to get Rosa as close to the skills and/or behaviors to be demonstrated as possible. Although it will take more time for James to design, he can let Rosa practice coaching in less than one hour by using simulations. Remember, it’s not about James, it’s about Rosa!

James should create the simulations in a first-person perspective, so that Rosa feels like she's talking to an associate face-to-face. The background should be realistic and set in the store.



Rosa will have a real coaching conversation with the associate and receive corrective feedback to get her on the right track if she selects an incorrect answer. If she selects a correct response, she continues on in the conversation - just like real life. That's Authenticity at its finest. And, it doesn't waste her time by letting her know she's right - she already knows that or she wouldn't have selected the answer!

As if that wasn't enough, here are a few more reasons why simulations are the most Efficient solution here:

1. They are short, but effective. In less than 10 minutes, Rosa can complete a simulation where she interacts with an employee and gets feedback on her performance. It's much easier for Rosa to find 5-10 minutes during the day than it is to set aside an hour.

2. They get Rosa straight to the content. She doesn't have to sit through coaching techniques and strategies that she won't remember anyway.

3. You can support simulations with job aids that will help Rosa long after she's finished the learning. Instead of showing a coaching checklist in an eLearning course, make it a PDF that Rosa can reference when she's preparing for a coaching conversation. She'll appreciate the support - and that she didn't have to sit through a narrator reading the checklist to her.

4. If Rosa needs a refresher because it's been awhile since she had to deal with a performance issue - she can retake a simulation in 5 minutes. That's Efficient and Timely - jackpot!

OKAY, YOU'VE CONVINCED ME. WHAT'S NEXT?

James and his team need to re-evaluate the learning strategy for the entire manager program to find ways to make it more Efficient.

They should start by analyzing the content to answer these questions:

1. What are the business goals and learning objectives? Cut any content that doesn't support them.

2. How can we change learner behavior and create an Authentic experience in the least amount of time possible?

3. How does this content address the learners' performance gaps? Is it need-to-know or nice-to-know? In other words, is it Relevant to my learners?

4. Would this content be more Efficient and Timely as a job aid?

Answering these questions will help James - and you - ensure that the learners' time is valued so that they can get back to their jobs faster and with a honed skill set!

CUSTOM ELEARNING UX AND UI BEST PRACTICES: HOW ARE YOU CAPTIVATING YOUR LEARNER?

Kevin is a brand representative who travels to different grocery stores in the Midwest to promote his company's products - chocolatey, gooey cookies that kids love! He has to make sure the products look organized and are on the lowest shelves so kids can get their hands on them, and mom and dad can't say no.

When he started in this role, Kevin had the opportunity to do a ride-along with Josh, a brand representative in another territory. Josh seemed to be buds with everyone in his stores and they were all willing to help him out.

Now that Kevin is on his own, he can't make the same connections as Josh. He's noticed that the grocery store associates don't seem to want to talk to him when he's in the store. And they look annoyed every time he asks them to move the cookies to a lower shelf. But it's their job! And he's just doing his.

Clearly, Kevin needs some help. He can't be in the store all the time so he relies on the grocery store associates to help him.

Sadie is a learning consultant in the organization's Global L&D team and is presented with this problem by Kevin's Regional Merchandising Manager. What can she do to help Kevin and other brand representatives?

JOB SHADOWING IS GREAT, BUT ISN'T ENOUGH

Kevin's onboarding was effective in some ways - it provided a solid foundation and a model of correct behaviors. The problem is that now Kevin is on his own he has realized that he is not Josh, and the connections Josh made are at different stores with different associates. Kevin needs practice. However, practicing on grocery store associates will further undermine his goal of building connections. To help Kevin connect with store associates, he needs to see how his actions play out in a risk-free and safe environment.

A great way to engage Kevin is to design an interactive video-based eLearning course that provides him with opportunities to make choices when connecting with associates. This "choose your own adventure" strategy will immerse Kevin in the experience and provide emotive feedback for Kevin that will hopefully make an impression and alter his behavior - it's also Efficient, Relevant, and Fun!

Sadie recommends to the Regional Merchandising Manager the interactive video concept with the following 4 scenarios:

1. *Building rapport in the store!*
2. *Don't just give a high-five. Associate recognition that matters!*
3. *You've got a problem? How to ask an associate to help you.*
4. *Associates DO need an education! How to help them, help you!*

Sadie works with members of the merchandising team and brand representatives to identify realistic scenarios. From these scenarios, she develops the script with relevant decision points and realistic associate feedback - Sadie is on a roll!

JUST BECAUSE IT'S A VIDEO, DOESN'T MEAN IT'S ENGAGING

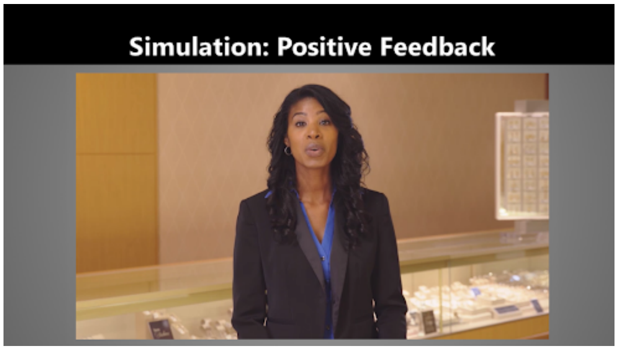
Sadie programs the course into a split screen with the video window on the left and a multiple choice decision point question on the right. Video has an immersive aspect that draws the learners in and makes the content “real” in a way that other mediums can't match. So why would Sadie not utilize the whole screen for the video?

The point of using video is so that learners can feel immersed in the situation - like they're really there. The Principle of Engaging means that the course is aesthetically pleasing, captivating and appealing. For maximum effect, your video should take up the whole screen, not just part of it. Text and graphic elements, if needed, should be positioned in the foreground of the video as a transparent overlay so as to not completely conceal the scenario in the background.

Right

Right

Wrong



Wrong

Video editing techniques can help you keep the pace of the course steady and prevent learners from feeling bogged down: speed up the video, or cut out little things that don't need to be retained.

IT CAN'T JUST "BE PRETTY"

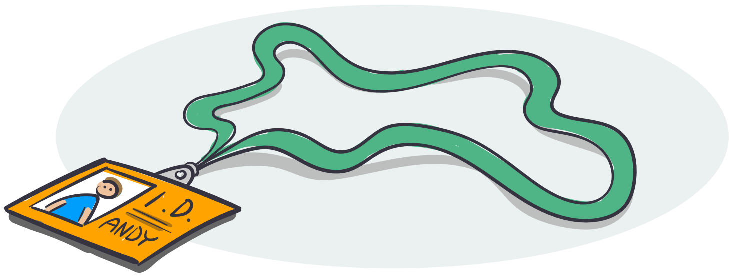
Before Sadie gets started on the course design, she retrieves the company's brand guidelines from her marketing department. Smart move, Sadie! The brand guidelines will help her select the right colors, fonts, and images to use in her course design. This will help her remain in compliance with the brand as well as give her a starting point rather than starting from scratch.

It is important for Sadie to follow visual hierarchy principles including size, placement and color. This will help the learners minimize distractions and focus on what's important, the interactive video. Also, a simple and consistent navigation style will reduce the learners' effort and keep them moving through the course smoothly. If a menu is necessary then create a simple hamburger drop-down navigation.

In my 20 plus years of designing custom eLearning courses, one thing has not changed, the first impression is everything. If you have a course that does not Engage the learners aesthetically, it is very difficult to pull them back in. By designing and publishing a polished course – one that resonates strongly with your audience – you prevent distraction, build credibility, and keep them focused on the learning objectives.

SUCCESSFUL CUSTOM ELEARNING: TOP TIPS L&D MANAGERS CAN USE TO CREATE A FUN LEARNING EXPERIENCE

At Andy's company, it's that time of year: the annual cyber security training needs to be updated, and this time the project was assigned to him.



He's excited because he has budget to improve it, not just do simple updates like usual.

Andy has decided to take a boring topic like cyber security training and make a real impression on the learners. He wants employees to talk about it like a viral video on YouTube. But, where does he start? How does he actually take a boring topic and make it fun?

FUN VS. FUNNY

Andy is known as a funny guy at the office, so he doesn't think he'll have any trouble making cyber security more entertaining. He's decided to start out with one of his favorite jokes:

> *"What is Forrest Gump's password? It's '1forrest1'! Any hacker could guess that!'"*

Oh boy, Andy's got "dad jokes."

He's forgotten that Fun does not mean the same thing as "funny." Fun strikes a balance between boring at one extreme and "Send in the Clowns" at the other. Lightheartedness is a great way to describe it: triggering a smile, not a belly-laugh.

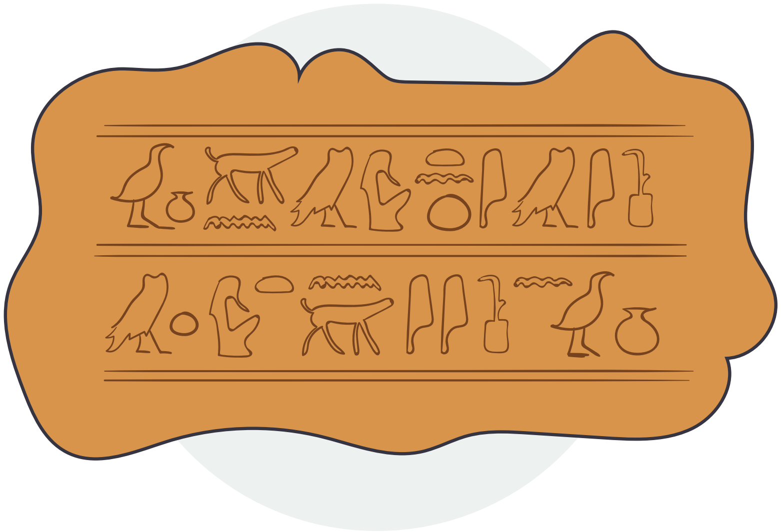
It's a pretty simple concept: If custom eLearning is delivered in a way that is "entertaining, amusing, and enjoyable," it's easier for learners to relate to, which in turn helps them absorb and retain the information better, and apply it on the job.

If you have a dry topic, like Andy's cyber security training, incorporating Fun can transform that content into training that motivates learners to engage with the course, complete it, and even take it again, as Mihaly Csikszentmihalyi's Flow Theory suggests.

HOW CAN ANDY MAKE THE COURSE FUN FOR EVERYONE?

Entertaining

Using stories can be a great approach because stories are entertaining but still teach valuable concepts. We know that the human brain is wired for stories – in fact, storytelling has been used to teach for thousands of years.



One of the strengths of custom eLearning is that it will allow Andy to tell a story interactively.

There are unlimited story-based options to choose from, and he can use just one or combine several to address the objectives of the cyber security course; for example:

- Choose your own adventure: Branching scenario where learners see the consequences of using the same password for every website
- Help a virtual character make the right decisions to keep his/her information safe
- A virtual character's information has been hacked! Help him/her solve the mystery!

The multiple branching paths of "choose your own adventure" would be less Efficient and don't align with the learning objectives. With cyber security, there is only one goal, and that is to keep your data safe. He determines that "Help a virtual character succeed" is a good fit – learners will keep their character safe from a hacker who's trying to steal their identity.

Amusing

Andy wants to support his story with some interesting graphics to help draw the learners in. Maybe it would be fun to do a “CSI” theme? Or “Silicon Valley”? Everyone loves those shows - and they are all about technology! Instead he conjures up a story about a "hacker" because it supports the business goals and learning objectives.

The eLearning user interface (UI) is an opportunity where Andy can introduce Fun. A creative, imaginative UI will increase learners’ interest in the course, whereas a boring UI might lead them to assume that the entire course will be boring, and thus unimportant. Andy chooses to use the UI as an opportunity to create a “hacker” avatar that provides humorous feedback to knowledge checks throughout as well as the introduction and conclusion.

Andy can choose to tell the story of the hacker with video. Video is a popular option to make eLearning more amusing: people spend hours watching online videos for fun - and Andy wants this to go “viral,” right? Once again, multiple options exist: professionally produced videos, informal cellphone footage, motion graphics, and animations, to name a few.

Andy could use professional videos - he has used that modality in the past when a course needed to depict real-world interactions between people. For cyber security, animated characters seem like a better fit for the upbeat, technology-oriented tone he wants. Furthermore, animation provides Andy with more options than video for what the “hacker” and his or her environment will look like.

Enjoyable

Andy has heard so much about "hard fun" - which means turning a course into a learning game that captures the learners' attention and provides intrinsic rewards for playing. Almost by definition, games are enjoyable and Fun, and Andy wants to leverage them to make everyone love his course!

Here are some game mechanics that Andy is considering:

1. Leaderboard where learners can compete against each other.
2. In-course scoring that allows learners to compete against themselves to achieve a personal best.
3. Badges and other items that must be collected to "unlock" further areas of the course.
4. Trivia that provides repetition for memorization of facts.

So how does he decide which game mechanics to use? The same way he makes other design decisions – by aligning it with his learning objectives and audience.

Behaviors and choices that enable learners to "win" the game should be the same behaviors and choices they need to be successful on the job. For example, if the business objective is team building, it would be counterproductive to pit individuals against each other in a competitive game; instead, choose one that rewards learners for cooperation and collaboration.

Andy's audience is diverse, since cyber security is important for all employees. There's not a lot of value in a in-course scoring, since the learners won't attribute the score to intrinsic or extrinsic value. Plus, they'll have the policy as a PDF file, so there's no need to memorize information. He decides to use a game where the learners collect badges that represent the policies and practices that will keep their virtual character safe from the "hacker."

This strategy is something to be carefully planned and apart of a more iterative design approach. Aligning the objectives and learner personas with game mechanics is a time consuming task. However, if it is done well, Andy will assure success for his learners to experience fun while engaging in the course.

With so many ways to make a custom eLearning course Fun, how do you choose a design strategy? The same way Andy did.

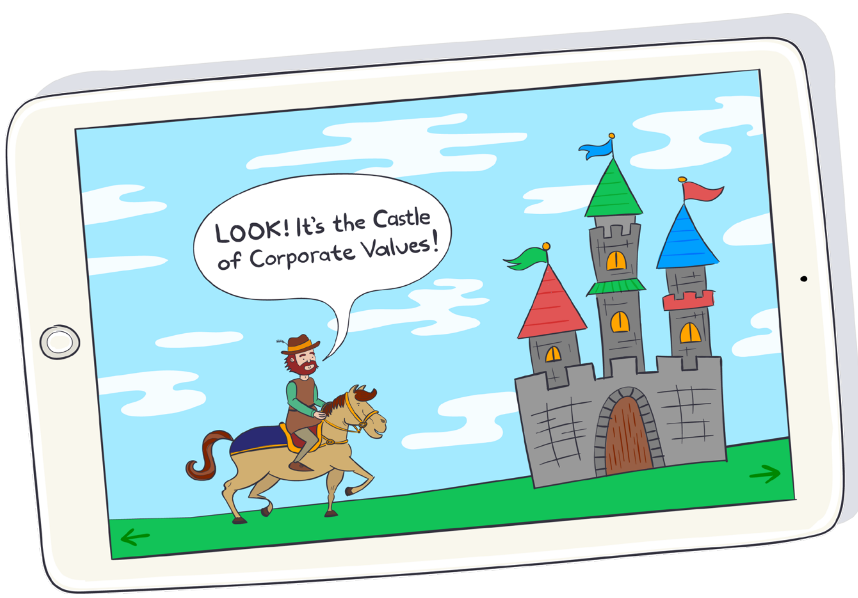
1. Always keep the business purpose and learning objectives of the course in mind.
2. Ensure that your user interface reflects the tone and topic of the course.
3. Design in-course games to reflect the same behaviors that will bring learners success on the job.

All good training should have some element of Fun because the sense of mastery that learners develop is a positive, rewarding emotion. And, just imagine an LMS full of courses that learners want to engage in, complete in a timely manner and in some cases actually re-engage with the training again and again.

THE BENEFITS OF DESIGNING CUSTOM ELEARNING THAT IS ATTAINABLE & VOID OF OBSTACLES

Whew! Miriam and her team finally launched the game they have been working on for the past year.

The game takes learners on an adventure through an ancient kingdom! New hires learn about the company's history, and how to embody and demonstrate behaviors associated with the corporate culture and values with their coworkers and customers.



Needless to say, the team is excited to check the course's survey results:

> *"This course took FOREVER to load. I gave up."*
>
> *"I tried to play the game on my tablet, but the buttons on the screen were too small for my fingers."*
>
> *"The storyline was hard to follow. I felt like I was reading and listening to a computer."*

EEK! That's not what they were hoping to read, and that was just a few of the friendlier critiques. Miriam's team may have designed a creative learning game, but they failed to make sure that it was easily Accessible for their audience.

SO, WHAT DOES ACCESSIBLE MEAN?

When Miriam hears Accessible, she and her team probably think of screen reader compatibility and closed captions. And that's good! All courses should be Accessible to people with impaired vision, hearing, and motor skills.

However, this article is not about the American's with Disabilities Act Section 508 guidelines. This Principle is about my broader definition of Accessible that impacts all learners. And, how Miriam's team failed to provide an experience that was easy to understand and easy to use.

An Accessible eLearning course is one that all learners in the target audience can access anywhere, on any device, and without obstacles. The content is easy to understand and can be attained without difficulty.

Think about it. It didn't matter how creative Miriam's course was because her learners couldn't get to it or figure out how to play the game.

HOW CAN MIRIAM SAVE THE ADVENTURE GAME?

Had Miriam started her design process with an audience analysis she would have found that all learners will access the course from work-issued PC's with varying internet speeds from DSL up to T-1. From there, she could identify the lowest common denominator of learners that would access the training. All decisions afterwards should have been made with those learners' needs in mind. And, in some cases it may be necessary to deliver the same content in multiple formats to accommodate various situations such as multiple devices, varying internet speeds, and different work environments.

EASY TO UNDERSTAND

Miriam's team spent a lot of time putting together the company's stories and highlighting the company's values. They paid special attention to the business goals and learning objectives. This made the content Relevant. However, there is something more fundamental that they missed. Is the content readable or easily comprehended?

Miriam and her team should have proofread the storyboards for readability. Even with the thematic elements and storyline, it was still challenging for most to follow. The brain needs a moderate level of stress (or challenge) to comprehend and retain content. Too much stress can have diminishing returns.

Here are a few tips that Miriam's team could have used when editing the course content early on in the storyboarding phase:

1. Make the instructions brief and crystal clear.
2. Get rid of all passive voice if possible.
3. Cut down on the adjective and adverb usage.
4. Don't let your sentences run-away with run-ons.
5. The less syllables the better.

Finally, when Miriam's team proofreads the storyboard, it is helpful to read it out loud. This allows her team to challenge themselves to cut up to 30% of unnecessary words. You'd be surprised at how verbose we can all be. Alfred Hitchcock said, **"Drama is life with the dull parts cut out."** Miriam should apply this concept to her script, since every detail is not necessary.

And, make sure you follow these tips during the storyboarding phase and not once the voice-over has been recorded and course has been developed. It's a lot less time consuming to change a Word document than a fully authored custom eLearning course.

EASY TO USE

A common complaint about Miriam's course was that it didn't load or function properly on all devices and the navigation was confusing in some parts of the course.

Many design choices are subjective, but the guidelines for creating an intuitive user experience are based on facts related to how users navigate a website. A design that is not intuitive will frustrate learners, take them out of the experience, and hinder their access to the content.

To avoid this kind of user experience, Miriam's team should have asked themselves:

1. Is the text ***easily*** read on all target devices?
1. Can buttons and other objects be selected ***easily*** on all target devices?
2. Do interactions function properly on all target devices?
3. Are the layouts and navigation consistent throughout the course?
4. Are we frustrating learners with unnecessary clicks including "Click Next", "Submit" or "X" to close out of a screen?

Some of these questions are self explanatory. But, let's take a closer look at a few of them. When you design a course for a screen resolution large enough for a laptop computer you're often ignoring a tablet or smartphone screen size. So, make sure you design for your lowest common denominator. If Miriam is aware of her audience, then she knows that the majority of the audience will be accessing the course on company owned PC's. Therefore, the lowest common denominator is the largest screen size available.

Also, since the PC is the primary method of delivering the course, then each action will be primarily activated by a mouse and not a finger. Therefore, Miriam's team has more options at their disposal for developing interactions.

Miriam's team should make sure that navigation is always consistent so that the learner aren't always searching around for access to resources and the main menu. Give the learners control over how they progress through the course. Some learners will move faster than others, they should not be penalized for it.

In the infancy of eLearning, clicks meant interaction and interaction meant more engaged learners. We could not have been more wrong. We need to stop asking learners to keep clicking next and submit buttons every time they would like to advance. There is no learning theory (at least one that has been proven) that states more clicks equals higher retention rates. In fact, more clicks can kill the flow of content and lead to learners that are less engaged with the content.

DON'T MAKE TRAINING A CHORE

Even if Miriam achieves the other 6 Better Learning Principles, forgetting about Accessibility will create roadblocks for most learners. Make sure to learn from Miriam's mistakes and make your next course easy to understand and easy to use. And, don't forget about the little guy, the lowest common denominator. Use this as your guideline so that no learner is left behind.

Let's be honest. Most learners aren't thrilled when they are asked to take an eLearning course. So when they launch a course and have trouble accessing it or navigating the content, they will be completely disengaged. We shouldn't make it more difficult to take training than it has to be. If we can ensure a smooth experience, learners will be able to focus on expanding their knowledge and gaining new skills - leading to the business impact you're hoping for!

A FINAL NOTE

WHEW - THAT WAS A LOT TO TAKE IN! THANKS FOR STICKING WITH ME.

Now for the pay-off. How do you actually judge your eLearning projects to make sure you're upholding the 7 Better Learning Principles? Easy! Start as soon as the business goals and learning objectives are established. This is when you need to align your strategy with the Principles. But, don't stop in the Analysis phase of your project.

Continue to score your project after storyboarding, prototype development and once your course is programmed. And, remember to use this tool to help navigate tricky conversations with SMEs and stakeholders so that you can build the business case for better learning. The only time it's too late is when you've received final sign-off on the course from your stakeholders and SMEs.

In my 20 years, I've worked on many projects that would get a perfect score on the 7 Better Learning Principles Assessment. But in reality, we are constantly struggling to balance SME expectations with budget limitations and accelerated timelines. The learning is what suffers from the struggles. As you rate your course, you may not give your project a perfect score, but as long as you're doing the best you can with what you have, you're serving your learners well.

BETTER LEARNING PRINCIPLES ASSESSMENT

Using the tool is very simple. With a critical and unbiased eye **review your project at every step of the process and rate each Principle 1-5** (one being the least, and five being the best). When you're done rating each Principle, add up your scores and compare it to the legend.

Every major phase in your project that requires change or progress should be evaluated. You will notice that sometimes your scores will start out really high because you have grandiose ideas, and then once you start applying them to the content your scores begin to come back down to earth. Other times, you may find that your score will grow as your course becomes a reality. Your goal during the learning strategy and storyboard is as close to 25 points as possible. During the Prototype your goal should be as close to 35 points as possible.

So how do you know what rating to give yourself? Refer to this legend when rating each principle.

Better Learning Principles Assessment Rubric	
1	You did not make any attempt to incorporate the Principle's attributes.
2	You used some of the Principles' attributes, however you did not use them correctly based on what is best for the learners.
3	The Principle is not applicable based on the learning objectives or client's preference OR you did an adequate job incorporating the Principle's attributes.
4	Good job adhering to the Principle's attributes.
5	Exemplary job adhering to the Principle's attributes.

	Learning Strategy	Storyboard	Prototype	Alpha
Authentic Is the learning as close to real life as possible?	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Timely Is the learning provided to learners as close to when they need it as possible?	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Efficient Is the learning well organized, clearly written and take as little of the learners' time as possible?	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Relevant Is the learning aligned with the business objectives and learning objectives or is there extra content that does not align?	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Engaging Is the learning captivating, aesthetically pleasing and makes a great first impression?	N / A	N / A	1 2 3 4 5	1 2 3 4 5
Fun Is the learning entertaining, amusing, or use game mechanics to enhance the experience?	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5	1 2 3 4 5
Accessible Is the learning easy to access and complete without obstacles?	N / A	N / A	1 2 3 4 5	1 2 3 4 5
Total Score:	/25	/25	/35	/35

ASSESSMENT SCORING

90% - 100%: Your course is going to rock!

80% - 90%: Your course is going to get noticed!

70% - 80%: Your course is going to be adequate.

Under 70%: Don't waste your learners' time.