LXD Playbook

Process and Procedures for Insights and Imagine It Phases

The Learning Experience Designer (LXD) role at Hot Neon is a critical role and acts as the main contact point for all major project decisions internally. The LXD is responsible for ensuring that value is created for the client and that usability is achieved for the end user. In other words, they must own the outcomes of the project, they must make sure that the end product matches or exceeds client expectations and benefits users.

They also share responsibility with the Project Manager to ensure viability and feasibility of the proposed project deliverables. This means that the deliverables planned are achievable given the schedule, team, budget, and client capacity. As the liaison between the client and the project team, the LXD must be informed or consulted at each step of the design and development process. The LXD must build strong relationships with all stakeholders internally (on our team) and externally (on the client's team) and work collaboratively to achieve the client's desired outcomes.

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Insights Phase

Stakeholder Mapping

Why we do it

To understand the client's context and make sure you get input from all of the right people, you need to identify everyone who needs to be involved from their organization, their roles, and their level of involvement. You can start to gather this information through an intake survey or in an initial interview with your **Project Sponsor** or the main contact you've been given access to. By gathering this information, you will find starting points for your research, learn who you need to build relationships with, and clues will emerge about what is important and why.

How we do it

Schedule a meeting with your Project Sponsor or the main client contact you have been given access to. This can be your first interview as well.

- The Project Sponsor is the person paying for our project on the client side and is typically (but not always) the final decision maker or approver.
- Ask open ended questions about who would be helpful to contact, who they think needs to be involved, how come they are important to talk to, and how they should be involved.
- Draw out a map of all the key players, how they're connected, how they will be involved in the project. You can use a tool like Miro or Figma if that's helpful. Post a publicly viewable link in the project's Basecamp.
- Stakeholders identified will usually fall into 3 types:
    - Leaders/Management
    - Subject Matter Experts
    - Users
- As you continue with your research, add notes to your stakeholder map that are relevant or helpful.

What it looks like

The detailed map is mostly useful as an internal tool for you and your team, but you'll want to include a simplified version as a table or list in the Insights Report and Project Roadmap
The main point is that you have a deep understanding of who the key people are in the project, their roles, and that you use that as a starting point to systematically gather information that will ensure you understand the client's goals, needs and expectations thoroughly.

Insights Phase

Needs Analysis

Why we do it

You must come out of the Insights phase with a **clear understanding of what the client needs and why.** You must understand what their expectations are for a solution, what their challenges or barriers are, and what they've tried in the past. Without this information, we can't propose a solution that will help them achieve the outcomes they want.

How we do it

- Stakeholder Interviews
  - Client Interviews
  - User Interviews
- Surveys
- Focus Groups or Workshops
- Observation or Field Research
- Keep your notes organized and accessible to the rest of the project team in a Google Drive folder in the appropriate Shared Drive, and add the link to the Insights folder in the project's Basecamp Docs & Files.

What it looks like

Take detailed notes during all of your research and share it transparently with stakeholders to confirm findings as you go. For example, when you're done an interview, share your notes with the interviewee for them to review and offer any more details or clarifications that come up. Once you feel you have a solid understanding, you must synthesize your findings into a **Needs Analysis** document that details your findings. Don't overthink this, prioritize getting it done. The point is to ensure you have a detailed and clear understanding. You will include a one page summary of key highlights from this in your Insights Report.

→ Guide to using motivational interviewing techniques for research

→ How to do a Needs Analysis (video)

→ How to conduct a Needs Analysis (article)

Insights Phase

Content Audit

Why we do it

To understand the client's expectations we need to establish deep knowledge of what they've already done. Many learning projects start based on core content that is contained in pre-existing client content such as old training videos, slide decks, webinars and scattered notes.

How we do it

- Ask the client to share any documents or materials they have about their brand that will help us with content writing or design (brand guides, style references, mood boards, writing guide etc.). It is important that our team familiarizes with their brand as soon as possible if we will be potentially creating assets for them or doing any content writing.
- Share a Google Drive folder with them where they can easily upload all relevant materials in the appropriate Shared Drive, and add the link to the Insights folder in the project's Basecamp Docs & Files.
- Ask if the client has any pre-existing content that might help you understand what they've done in the past
- Ask for any context about the content that might be helpful, including a tour, walkthrough or presentation of it if possible
- Ask what they like and dislike about the old content and why, where did it work well? Where did it fail?

What it looks like

Take notes on your findings from the content audit and organize them in the project's Google Drive. Include a link to the Google Drive in the project's Basecamp.

Add notes on each key artifact from the client:

- What content is important to include in our solution?
- What content can be cut?
- What needs to be updated or revised to meet the client and user needs?

Start thinking about recommendations:

- What would you do differently?
- How could things be improved in our solution?

Outline all of the strengths and weaknesses and build a content outline for our solution. Synthesize your findings and recommendations in a **Content Analysis** document.

Insights Phase

User Analysis

Why we do it

To create an effective and engaging experience, we need to understand the end-user. The user is also sometimes called “audience” or “learner”, but we will most often use the term “user” since it’s the most common way to describe someone participating in a digital interactive experience. You must establish a clear profile of your “typical” user groups, Edge cases can help you think through accessibility considerations that may improve your design for all users.

How we do it

- Empathy mapping
- Task analysis
- Independent research
- User personas

What it looks like

→ **User Analysis Process Template**

Evaluation Strategy

The main deliverable at the end of the Insights phase is a strategic plan called the Insights Report. The Insights Report is like an executive summary of your findings and recommendations for next steps based on your research. It should include highlights and artifacts from your activities summarized and put into a concise and visually appealing presentation that can be shared back to key stakeholders in a meeting.

The Insights Report should not include all of your research and everything in once place, that is overwhelming. It should only include highlights, the most important findings that influenced your recommendations.

It should be thoroughly condensed and distilled down to be clear, relevant, and valuable to the client.

A strategy outlines **what** you are doing and **why** at a high level.

It defines the problem and what your solution will do to overcome it, or to state it in a strengths-based way, the strategy defines the opportunity and proposes a way to create that future state.

In the Insights Report, you present your **strategy** for achieving the client's desired outcomes. You share your vision for a recommended design solution and explain why you have come to these conclusions. You might include some high level tactics that will make up the solution. Tactics are the activities that will achieve objectives which over the medium or long-term lead to the desired organizational outcomes. For example, specific resources that need to be developed as part of the overall learning or behaviour change.

Imagine It Phase

The third step in our design process is Imagine It. **The purpose of the Imagine It phase is to paint a clear picture for everyone on the project of the structure of the learning experience and its components.**

During the Imagine It phase we create a detailed content outline, scripts and storyboards. By the end of the Imagine It phase, we should have all of the content approved by the client before moving on to Make It and Break It.

Content Outline

Why we do it

For the user: The structure and sequence of content matters, and so it is crucial to take time to thoughtfully design a logical order for introducing and elaborating on topics or concepts. Deciding which topics to introduce and when to introduce them is a part of "scaffolding" in instructional design, providing more support for concepts the learner doesn't know yet and building on knowledge with each section. By gaining understanding of the typical user's prior knowledge and experiences, you can make decisions about the content and how it is organized.

For the client: Your draft of the content outline can act as another touchpoint for checking in with the client, building trust, and building commitment. If you have any uncertainty or feel that they need additional clarity about what the project will look like, schedule a short call to share the content outline with them and share why you've made any important content decisions and ask if you are missing anything or if they have anything else they'd like to see included.

For us: A clear content outline also helps our team internally, by creating a logical content outline you are organizing your thoughts and putting them in a clear and organized structure that you can communicate to the rest of the team. A content outline functions as an ordered list of content pieces and sections that will make up the learning experience. The content outline provides a backbone for the storyboard, and helps you outline assets that need to be created and content pieces that you must write.

Imagine It Phase

Content Outline *continued*

How we do it

Create a Google Doc in the project's shared drive in the **Imagine It folder.** Make sure the title includes "Content Outline" and the Project's name.

- Link to the Google Doc in the project's Basecamp Docs & Files.
- Write down all the specific learning, communication, or change objectives you are working to achieve with this learning experience.
  - Think of these as your promises to the end-user of what they will get out of the program. They should be specific and based on action verbs. What will they be able to do after completing this experience? After each section?
- Write down the big picture outcomes or key results that this learning experience will help contribute to.
  - These are things that we can't take all the credit for, but that we are helping. A learning experience or video is usually just one piece of a much bigger goal or vision. These are the high-level reasons for why this learning experience is being designed, and so we want to ensure we are framing the content through the lens of how it connects to bigger picture organizational goals.
- Create a four column table in the Google Doc with a row for each content section, sub-section, or scene (video).
- Organize and categorize the experienced material under a column labeled "Section."
- In the first column, add a number for each section, use a decimal to add incremental numbers for subsections or different visual beats in the scene.
- In the third column, add a Description of what happens in that section, and always include the Purpose of the content and the Format.
  - Thinking in this way will help you to start to think through what assets we need to create and cut any content sections that are unnecessary.
- In the fourth column, connect the objectives & key results (outcomes) that are connected to that specific content section.
  - By the end, you can be sure that you addressed all of the important content if you have used every objective and outcome from your list at the top of the doc.
- Review your format suggestions with the Project Manager to ensure they're within budget and scope
- Review the outline with the Creative Director and Development team so they can start to prepare early preparations for assets and prototypes

What it looks like

→ **Content Outline Template**

Content Writing

Why we do it

If the course outline is the blueprint, written content is the foundation. Content writing is where you lay the groundwork for all of the multimedia production that will take place in the Make It phase.

Through content writing, you also surface asset creation needs that the creative team can start working on in the **Visualize It** step. For example, you've come up with a video script that needs a character, or a specific scene that represents a real location, or an icon to represent a concept. These visual needs all arise from you figuring out how to word things to best meet the user and client's needs.

As the team member with the deepest understanding of the client's problem and the vision for the solution we're building, the LXD takes the lead on content writing for the project. This does not mean that you must write all of the content yourself, but you are responsible for:

- Delegating to other team members as needed
- Communicating the vision and purpose for each content piece
- Reviewing and approving their work internally
- Ensuring writing aligns with the vision and meets quality standards

How we do it

- Scripts for narrated voice-overs
- Writing on-screen text for sections that are to be read by the user
- Scripts for dialogue and interactive branching scenarios
- Writing supplementary resources, like checklists, instructions
- Writing content that supports engagement and delivery

What it looks like

We use the term "script" to describe content which will be spoken. In other words, the user will hear the words. Scripted content should be written for how real people speak. It should be conversational and less formal than typical technical or instructional writing.

Scripts should also include direction notes in parentheses. Direction notes or "stage direction" provide suggestions for what is happening on-screen or how words are spoken. For a narrated voiceover script, provide direction on the tone, pacing and feeling you want to evoke in the user. For example, you may want them to read a section more slowly, or to emphasize a certain point.Stage direction is especially helpful when writing for dialogue, meaning two or more people speaking with each other, like in a branching scenario. Include notes with suggestions to help both the creative team and the voice actors.