

Executive Summary:

Talespin Pod	Kristin, Scott, Aileen
Total # of Flows	4
Total Word Count	
Number of Virtual Humans (VHs)	3
List Names +Wardrobe of all VHs Used	1. Jacqueline_Business 2. Tala 3. Andrea_Business
Preferred VH Name +Wardrobe for Image Assets	Tala
Number of Environments:	2
Environments Used:	1. Office Town Hall 2. Office Education
Preferred Environment for Image Assets	Education Office
Is Lingering Text function used? (Y/N)	N

Learning Design

Discovery

- [Drive Folder](#)
- [Track D design board](#)

Learning Objectives

Learners will be able to

1. Determine success factors that contribute to a company's goals
2. Define Key Performance Indicators (KPIs) that map to desired company outcomes

3. Evaluate alignment between KPIs and a company's definition of success

Key Learning Points

1. Learners will meet with leaders to bring two conflicting parties to align on desired organizational goals and the success factors that enable them.
2. Learners help two leaders strategically define KPIs that reflect company measures of success.

Skills and Definitions

1. **Conflict Resolution:** Ability to mitigate tension between opposing viewpoints and negotiating a mutually agreeable solution for all parties.
2. **Verbal Communication:** Ability to effectively use speech (or vocalization) to articulate information in a clear, concise, and coherent manner.
3. **Collaboration:** Ability to work with others to achieve effective results.
4. **Motivating:** Ability to encourage or inspire action toward a positive outcome and support another person's efforts in the desired direction.
5. **Other awareness:** Ability to be cognizant of others' emotions, thoughts, values, capacities, strengths, and limitations, and recognize how they influence behavior.
6. **Logical Reasoning:** Ability to select and interpret information from a given context, make connections, verify, and draw conclusions based on available and interpreted information and the associated rules and processes.
7. **Critical Thinking:** Ability to analyze facts, generate and organize ideas, defend opinions, make comparisons, draw inferences, evaluate arguments, and solve problems.
8. **Risk Assessment:** Ability to identify potentially problematic actions or topics, predict their impact, assess implications, and take action to avoid or mitigate those risks.
9. **Key Performance Indicators:** Ability to share information, explain facts, or provide insights relating to key performance indicators, or the act of defining or facilitating the process of defining key performance indicators.

Experience Design

Module Description

(Metadata: 500 chars. max)

Learners play the role of The Commissioner, who meets with the leaders of [SchoolHouse Heroes](#) to help them navigate a tough decision. The changing environment and a series of unfortunate business decisions have left them financially vulnerable. There is a promising opportunity available to them, but it doesn't align with the Executive Director's beliefs about their mission and vision. They need help aligning on organizational goals and the success factors that will keep them afloat.

Context setting / Relevant world-building details

SchoolHouse Heroes has seen a drastic decline in core company partnerships, fewer donations, and fewer volunteers to help support their efforts. They've been operating on a shoestring budget; and their poor decisions and careless agreement to projects (led by Koko) has put them in a rough financial position. This misfortune has been exacerbated by the changing environment. This has led to friction between Koko, the Executive Director and Mara, the Development Director. Mara now feels like they really need to start strategizing how they can be most effective to keep from going under, and this golden partnership is the life boat they've been waiting for.

Why is this topic/module relevant and important?

(Metadata: 500 chars. max)

Alignment of Key Performance Indicators (KPIs) to business outcomes is key to success. Strategic KPIs enable effective management of people and processes, as well as facilitate clear alignment about goals and business objectives.

Module Structure Overview

Flow	Flow Type	Flow Name
1	Lesson (not scored)	Introduction
2	Lesson (not scored)	Mission or money?
3	Lesson (not scored)	Proposing a compromise

4	Lesson (scored)	KPIs for success
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Note: “Scored” in these flows indicates the learner’s score will be tracked normally through Skill and Variable nodes, and reported through Popup node text with the appropriate value-reporting syntax

Flow 1 Design

Flow 1 at-a-glance	
Flow Name: <i>(Metadata: 50 chars. max)</i>	Introduction
Flow “Type”: <i>(Pre-Assessment / Lesson / Post-Assessment)</i>	Lesson (not scored)
Environment <i>List the Environment Name that will be used in the flow. [Environment Full Catalog]</i>	Office Town Hall
Virtual Humans + Character Names	Jacqueline_Business

Conversation Goal:

Include the conversation goal. This should differentiate from the learning objectives. Example: Talk to Sally about her performance. (Metadata: 75 chars. max)

Speak with Nia Okoro about your next meeting with Koko of Schoolhouse Heroes.

Narrative Description / Flow Overview:

(Metadata: 500 chars. max) Include 3-5 sentences describing the conversational context.

NOTE: This brief introductory flow is a feature of all WEG modules and serves as a basic introduction to this content and connects this module to the overarching World flows.

Nia, the Commissioner’s Assistant, enters to tell the Commissioner (learner) that Koko from Schoolhouse Heroes has arrived for her scheduled appointment, and she has come for advice on a high level concern related to KPIs. Nia and the learner quickly review the basics of KPIs so the Commissioner/learner will be prepped and ready to discuss Koko’s specific concerns.

Learning Objectives

Any learning objectives listed here should be specific to this flow. If the learning objectives are just the same as the overall module learning objectives, don't include them here.

N/A

Skills

List all skills tagged in this flow.


This is a non-scored flow.

Key Learning Points

List the KLPs targeted by this flow.


N/A

Virtual Human Character 1

CPD Virtual Human Screenshot	
CPD Virtual Human Name	Jacqueline_Business
Flow Character Name	Nia Okoro
Age	50
Ethnicity	Black / African America
Gender	Female

Character Description	See Campfire bio
Voice-over direction (Accent, if any)	American

Flow 2 Design

Flow 2 at-a-glance	
Flow Name: <i>(Metadata: 50 chars. max)</i>	Mission or money?
Flow "Type": <i>(Pre-Assessment / Lesson / Post-Assessment)</i>	Lesson (not scored)
Environment <i>List the Environment Name that will be used in the flow. [Environment Full Catalog]</i>	Office Education
Virtual Humans + Character Names	 VH Tala Koko Swiftwater, Executive Director

Conversation Goal:

Include the conversation goal. This should differentiate from the learning objectives. Example: Talk to Sally about her performance. (Metadata: 75 chars. max)

Speak with Koko about the business issue she's currently wrestling with.

Narrative Description / Flow Overview:

(Metadata: 500 chars. max) Include 3-5 sentences describing the conversational context.

Koko has a problem. [SchoolHouse Heroes](#) is struggling financially, and there's a promising partnership opportunity that can dig them out of the hole, but it conflicts with Koko's vision of the organization's mission. Specifically, it focuses on clear, measurable KPIs that track quantitative results supported by stakeholders, where Koko is focused on less clearly defined qualitative goals supported by students and faculty. She needs your help in figuring out how to make the right decision.

Learning Objectives

Any learning objectives listed here should be specific to this flow. If the learning objectives are just the same as the overall module learning objectives, don't include them here.

N/A

Skills

List all skills tagged in this flow.

This is a non-scored flow.

Key Learning Points

List the KLPs targeted by this flow.

N/A

Learner's Character/Role:

One-liner about who the learner is playing as and how they're connected to the NPC.

Example: Team Lead at a tech company. You'll be talking to one of the team members you manage in this module.

The [Learner](#) plays a Levitt Heights [Commissioner](#) currently running for reelection. Ten years ago, the learner successfully founded the innovation hub, bringing in businesses, organizations, and investors that revitalized Levitt Heights' struggling economy. Levitt Heights is the learner's hometown. Recently though, the core companies of the Innovation Hub program have been rocked by misfortune and scandal, threatening their very survival. The Learner is positioned to help them find their way back to success.

Learner's Arc:

Details regarding the Learner's emotional arc throughout the best path of the flow.

Learner is empathetic to Koko's situation and is eager to help find alignment that will benefit Schoolhouse Heroes and Levitt Heights as a whole. They begin engaged and inquisitive, empathize with the position Koko is in (having to balance her philosophical goals with the realities of running a non-profit entity), and end with a commitment to help Koko navigate a successful compromise.

VH Character(s)/Role/Relation to Learner:

Detail the dynamic between the virtual human(s) and the learner's character.

[Koko Swiftwater/Executive Director](#); Koko is the Commissioner's peer, and one of the key leaders in the Levitt Heights business community; she is also a valued participant and cooperative partner in the Commissioner's innovation initiative. She has come to

the Commissioner for assistance in weighing the value of a new development initiative for her company and determining the best path forward.


VH's Arc:

Details regarding the VH's emotional arc throughout the best path of the flow.

Koko is experiencing cognitive dissonance. She knows that SchoolHouse Heroes needs a critical partnership and that her job could be at stake if she doesn't start compromising because she is constantly deciding to do projects no one else wants to do, and that lack of support has led to financial struggle. However, she feels like this particular partnership opportunity will change the focus of Schoolhouse Heroes' mission by stressing test scores as a key metric by which they measure success, which Koko fundamentally disagrees with. She's questioning whether it's worth staying at SchoolHouse Heroes at all if it means sacrificing her professional integrity and compromising her vision for Schoolhouse Heroes.


Koko begins frustrated and unable to make a hard decision, seeing only downsides to each option she has. The Commissioner's empathetic and engaged response heartens her somewhat, though she is still concerned and pessimistic about how this will play out. She ends on a note of tentative hope that the Commissioner can help work out a solution that appeals to all concerned.

Virtual Human Character 2

CPD Virtual Human Screenshot	
CPD Virtual Human Name	Tala

Flow Character Name	Koko Swiftwater
Age	43
Ethnicity	Native American
Gender	Woman
Character Description	See Campfire Bio
Voice-over direction (Accent, if any)	American

Flow 3 Design

Flow 3 at-a-glance	
Flow Name: <i>(Metadata: 50 chars. max)</i>	Proposing a compromise
Flow "Type": <i>(Pre-Assessment / Lesson / Post-Assessment)</i>	Lesson (not scored)
Environment <i>List the Environment Name that will be used in the flow. [Environment Full Catalog]</i>	Office Education
Virtual Humans + Character Names	 VH Andrea_Business Mara Narvaez, Development Director

Conversation Goal:

Include the conversation goal. This should differentiate from the learning objectives. Example: Talk to Sally about her performance. (Metadata: 75 chars. max)

Speak with Mara to fully understand the conflict between her and Koko.

Narrative Description / Flow Overview:

(Metadata: 500 chars. max) Include 3-5 sentences describing the conversational context.

Mara doesn't understand why Koko is resisting this new partnership: KPIs are a valuable tool for any organization, and standardized test scores are a common metric that stakeholders support – and on which to raise development funds. She respects Koko's priorities, but finds Koko's focus on fuzzier qualitative success to be impractical. Mara wants a more measurable indicator of success that will guarantee funding, or the entire non-profit enterprise will be at risk.

Learning Objectives

Any learning objectives listed here should be specific to this flow. If the learning objectives are just the same as the overall module learning objectives, don't include them here.

N/A

Skills

List all skills tagged in this flow.

This is a non-scored flow.

Key Learning Points

List the KLPs targeted by this flow.

N/A

Learner's Character/Role:

One-liner about who the learner is playing as and how they're connected to the NPC.

Example: Team Lead at a tech company. You'll be talking to one of the team members you manage in this module.

The [Learner/Commissioner](#) has been invited to help reconcile the competing visions for Schoolhouse Heroes' future.

Learner's Arc:

Details regarding the Learner's emotional arc throughout the best path of the flow.

Learner is empathetic to Mara's situation and is eager to help find alignment that will satisfy both her and Koko. Learner begins engaged and inquisitive, empathizes with the position Mara is in (responsible for the financial realities of running a non-profit entity), and ends with a commitment to help forge a successful compromise.

VH Character(s)/Role/Relation to Learner:

Detail the dynamic between the virtual human(s) and the learner's character.

[Mara Narvaez/Development Director](#)


Mara is a valued peer and a key contributor to the Commissioner's plans for Levitt Heights, and the innovation initiative the Commissioner is pursuing. She takes the practical view of Schoolhouse Heroes' future: the organization needs professional and financial commitments from its stakeholders to ensure its continued existence and success.

VH's Arc:

Details regarding the VH's emotional arc throughout the best path of the flow.



Mara is flabbergasted and doesn't understand why Koko remains stubborn. She can't fathom why Koko wouldn't jump on this opportunity, and she feels as if Koko wants to focus on high-minded principles at the expense of what's best for the organization. Mara approaches this conversation pleading for you to help bring Koko on her side, and while she ends on a note that signals a willingness to compromise, she is determined to secure Koko's support for this new initiative.

Virtual Human Character 2

CPD Virtual Human Screenshot	
CPD Virtual Human Name	Andrea_Business
Flow Character Name	Mara Narvaez
Age	41
Ethnicity	Latinx
Gender	Female

Character Description	See Campfire bio
Voice-over direction (Accent, if any)	American, spanish secondary

Flow 4 Design

Flow 4 at-a-glance	
Flow Name: <i>(Metadata: 50 chars. max)</i>	KPIs for success
Flow "Type": <i>(Pre-Assessment / Lesson / Post-Assessment)</i>	Lesson (scored)
Environment <i>List the Environment Name that will be used in the flow. [Environment Full Catalog]</i>	Office Education
Virtual Humans + Character Names	<div> VH Tala Koko Swiftwater, Executive Director</div> <div> VH Andrea_Business Mara Narvaez, Development Director</div>

Conversation Goal:

Include the conversation goal. This should differentiate from the learning objectives. Example: Talk to Sally about her performance. (Metadata: 75 chars. max)

Help Koko and Mara align their organizational goals and success criteria.

Narrative Description / Flow Overview:

(Metadata: 500 chars. max) Include 3-5 sentences describing the conversational context.

Meet with Koko and Mara to help them find middle ground regarding organizational goals. Help them come to an agreement about what SchoolHouse Heroes defines as success and determine client-focused KPIs that will enable desired outcomes. They need your help to steer SchoolHouse Heroes in the right direction.

Learning Objectives

Any learning objectives listed here should be specific to this flow. If the learning objectives are just the same as the overall module learning objectives, don't include them here.

Learners will be able to:

1. Determine success factors that contribute to a company's goals
2. Define KPIs that map to desired company outcomes
3. Evaluate alignment between KPIs and a company's definition of success

Skills

List all skills tagged in this flow.

1. **Conflict Resolution:** Ability to mitigate tension between opposing viewpoints and negotiating a mutually agreeable solution for all parties.
2. **Verbal Communication:** Ability to effectively use speech (or vocalization) to articulate information in a clear, concise, and coherent manner.
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4. **Motivating:** Ability to encourage or inspire action toward a positive outcome and support another person's efforts in the desired direction.
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6. **Logical Reasoning:** Ability to select and interpret information from a given context, make connections, verify, and draw conclusions based on available and interpreted information and the associated rules and processes.
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8. **Risk Assessment:** Ability to identify potentially problematic actions or topics, predict their impact, assess implications, and take action to avoid or mitigate those risks.
9. **Key Performance Indicators:** Ability to share information, explain facts, or provide insights relating to key performance indicators, or the act of defining or facilitating the process of defining key performance indicators.

Key Learning Points

List the KLPs targeted by this flow.

1. Learners will meet with leaders to bring two conflicting parties to align on desired organizational goals and the success factors that enable them.
2. Learners help two leaders strategically define KPIs that reflect company measures of success.

Learner's Character/Role:

One-liner about who the learner is playing as and how they're connected to the NPC.

Example: Team Lead at a tech company. You'll be talking to one of the team members you manage in this module.

[Learner/Commissioner](#)

Learner's Arc:

Details regarding the Learner's emotional arc throughout the best path of the flow.

The learner takes on the role of a mediator, sharing their observations from their discussions with both parties. They try to remain objective and productive throughout the conversation, focusing back on the topics of organizational objectives, stakeholders, and KPIs to determine a path forward that's acceptable to both sides.

Suggest the initial compromise bridges the gap between Koko's qualitative vision of success with Mara's quantitative one, to the mutual benefit of the students and Levitt Heights as a whole, as well as to Schoolhouse Heroes and its stakeholders.

Specifically, by incorporating measurable KPIs for the organization and its stakeholders that both ensure the quality of the education received by the students and the financial health of the organization. For example, Koko agrees to adopt KPIs that support a focus on test scores and thus secures the financial commitment of the stakeholders, and Mara agrees the new curriculum will also focus on Koko's qualitative goals—such as certification/accreditation of soft skills like DICE and anti-bias training; interpersonal, communication/management skills; a focus on STEAM courses to set the student body up for success; and/or specific, targeted training for internships with local businesses so the students are able and encouraged to "give back" to Levitt Heights and prevent the kind of brain drain Granite Valley is seeing.

[Koko Swiftwater] VH's Arc:

Details regarding the VH's emotional arc throughout the best path of the flow.

Sees students as the organization's primary clients. She has a more altruistic, qualitative view of the organization's mission that tends to the whole learner, including social and emotional skills, not just grades. She has a strong negative view about standardized test scores and takes offense that Mara is entertaining this partnership. She begins to display more empathy when the learner explains both perspectives, and that neither are necessarily wrong. She starts seeing a better way to compromise once they get alignment on what their organization's definition of success is and who their clients are, then she gets into strategizing mode.

[Mara Narvaez] VH's Arc:

Details regarding the VH's emotional arc throughout the best path of the flow.

Sees partner stakeholders (board of directors) as the organization's primary clients. She has a very pragmatic, quantitative approach to this decision because she feels that without it, they will cease to exist to make the change they actually want to make. She defines success as being able to stay in business. She begins to display more empathy when the learner explains both perspectives, and that neither are necessarily wrong. She starts seeing a better way to compromise once they get alignment on what their organization's definition of success is and who their clients are, then she gets into strategizing mode.

Research and Other Resources

Summarized from the following articles:

- [Key Performance Indicator \(KPI\)](#)
- [What is a KPI? How To Choose the Best KPIs for Your Business \(hubspot.com\)](#)
- [Essential Program Management KPIs | Smartsheet](#)
- [MindTools | Home: Performance Management and KPIs](#)
- [How to Write KPIs in 4 Steps + Free KPI Template \(cascade.app\)](#)
- <https://sloanreview.mit.edu/customer-focused-kpis-fuel-the-future-of-business/>

Content for FLOW 1: Introduction to KPI

1. *What are KPIs and what do they typically include?*

KPI definition:

- *KPI is a measurable value that illustrates how effectively a company is performing towards key business objectives. Organizations use KPIs to monitor their success at reaching targets. (source: [LINK](#))*
- *KPIs are mainly **financial** and **non-financial metrics** used to:*
 - *Evaluate the effectiveness of processes at achieving key business objectives of a company.*
 - *Help an organization define and measure progress towards organizational goals.*
- *KPIs typically include:*
 - *Details of parameters from which the KPI is derived*
 - *Sources for collecting the data and KPI's indicative value range*
 - *Unit of measurement and formula for KPI calculation*

2. *Why are KPIs crucial for an organization's success?*

With KPIs, development, performance, or position of the business of the company can be measured effectively.

- *KPIs can also help track the effectiveness of:*
 - *Projects*
 - *Processes*
 - *Campaigns*
 - *Strategic changes*
- *Key performance indicators can help:*
 - *Keep high-level goals top of mind*
 - *Convert abstract ideas into manageable targets*
 - *Cut down on data overload*

Source: [LINK](#)

3. What are client-focused KPIs?

KPIs with a focus on customers in ways that can show whether operations are or aren't improving are client focused KPIs. Some examples of customer-focused KPIs are:

- **Success Rate:** This is the measure of success in meeting any of the various customer-focused goals that a program may establish.
- **Customer Satisfaction:** This can be measured through customer reviews of the products/service.
- **Customer Retention:** This is a measure of the percentage of customers retained to become repeat customers.
- **Customer Engagement:** Customer engagement can be measured through digital measures, including how long a customer stays on your website. It can also be measured in other direct ways, such as how often your customers or potential customers interact with your sales teams.

Source: [LINK](#)

4. How do you determine client-focused KPIs for an organization?

- KPIs are derived from the **strategy**, **objectives**, and **Critical Success Factors** (CSFs) of an organization.
- Identify the SMART KPIs that will help determine the client focused KPIs:
 - **Specific:** There should be clarity about what each KPI will measure, and why it's important
 - **Measurable:** The KPI must be measurable to a defined standard
 - **Achievable:** You must be able to deliver on the KPI.
 - **Relevant:** The KPI must measure something that matters to the client and improves performance.
 - **Time-Bound:** The KPI should be achievable within an agreed time frame.
- Find answers for the following questions to define effective client-focused KPIs:
 - What is your organization's vision? What's the strategy for achieving that vision?
 - Which metrics will indicate that you are successfully pursuing your vision and strategy?
 - How many metrics should you have?
 - What should you use as a benchmark?
 - How could the metrics be deceived, and how will you guard against this?

(source: [LINK](#))

5. *What is the process for creating client-focused KPIs?*

1. **Step 1 - Determine the Key Strategic Objectives:** Before writing KPIs, you'll first need to determine which of your organization's strategic objectives you're trying to gauge.
2. **Step 2 - Define Success:** The success factors for each objective must be defined.
3. **Step 3 - Decide on measurement:** There can be various platforms and tools across business to measure KPIs, but having a central location to track and view all the organizational KPIs will ensure that you have a clear view of your success.
4. **Step 4 - Write your KPIs:** The KPIs should follow the SMART format. Starting off with a verb forces you to be specific. A metric and unit ensure that the KPI is measurable. A timeline will indicate your progress.

6. *What is the KPI Alignment Index?*

This survey questionnaire helps determine if the organization is aligned with its use of KPIs. These are designed to get employee responses on KPI alignment. Responses with higher scores on all questions represent Measurement Leaders. Responses with a medium score represent the Measurement Capable, while responses with the lower scores indicate Measurement Challenged.

1. To what extent do your organization's KPIs drive how you lead and/or manage your people and processes?
2. To what extent do you believe your function's KPIs are explicitly and directly aligned to your organization's strategic goals and business outcomes?
3. To what extent do you agree with this statement?: "I feel empowered and enabled to achieve my KPI business objectives."
4. To what extent do you determine and/or set your function's KPIs?
5. To what degree do you agree with the following statement?: "I am satisfied with how the KPIs that I manage/report on inform and influence decision making across the enterprise."
6. To what extent do you (as stakeholder) trust the accuracy and reliability of your KPIs?

Significance of the KPI Alignment Index:

KPIs that focus on customers beyond the sales funnel encourage organizational realignment around sharing, coordination, and collaboration. KPIs that are too narrow, too retrospective, or too disconnected from the larger strategy will undermine efforts to achieve customer-related goals.

Source: [LINK](#)