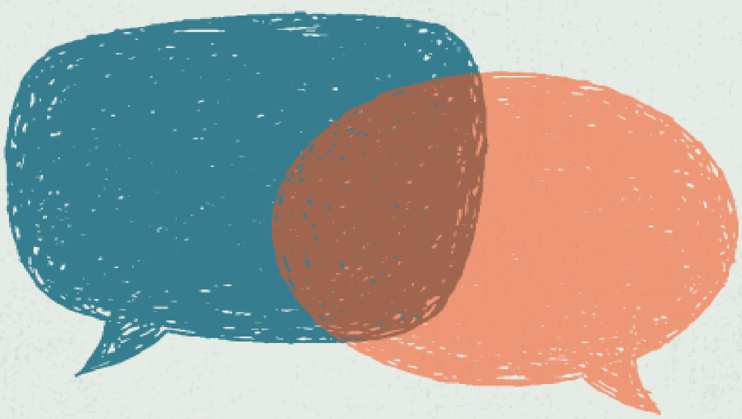
Instructional STORY DESIGN



Develop Stories That Train

Rance Greene

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For Sharon and Tia

Foreword

Sandi, a graduate student in Bloomsburg University's well-known Instructional Technology program, burst into her professor's office after her first class. "Dr. Kapp, I am very excited about using technology for learning. I think the latest and greatest technology makes learning stick. What a great time to be in the field."

"Sandi," Dr. Kapp responded, "while our program has the word 'technology' in its title, it's really the underlying instructional design that makes the difference between effective and ineffective instruction, not the technology. It's that difference that makes our students so sought after in the field of L&D."

But Sandi plowed right along, her eagerness reminding him of his own kids. "Virtual reality is just so cool; I want to create an environment where a learner wanders around a warehouse looking for safety violations or a volcano where kids explore the internal workings of the Earth. And augmented reality . . . think of the possibilities."

"Hold on a moment, Sandi, hold on. Why don't you take a seat? I think you and I need to explore what really is the heart of effective instruction. It's not technology." Dr. Kapp paused, trying to slow Sandi down. He appreciated her enthusiasm but wanted to make sure it was focused on the right area. This type of wild enthusiasm is what made his job rewarding and frustrating at the same time.

Sandi caught her breath and sat down in one of the chairs reserved for visiting students. They were not overly comfortable. She placed her backpack on the floor.

Dr. Kapp waited until she got settled. "Sandi, there are lots of methods for delivering instruction but, underneath it all, you need to have effective instructional design. You shouldn't worry about the technology until after you've created the right design for the learning. In fact, one good design method is to use stories."

Sandi shook her head. "Dr. Kapp, no offense, but I've been in undergraduate classes where the instructor tells these long, drawn-out war stories that don't make any sense. I keep wondering, 'What's the point?' I don't think stories are a good way to teach."

"Unfortunately, that's a common occurrence both in academia and in many corporate training sessions, but that's not the fault of the technique; it's the fault of the design of that particular story. The instructor in those cases hasn't used a systematic method to design the proper story. Instead, they winged it."

"Yeah, those stories didn't sound well planned at all. In fact, they were more like jumbled ramblings," Sandi replied, now nodding her head.

"Stories have been used for centuries as tools for passing on knowledge. Think of the parables used in ancient times to teach morals or how parents pass lessons to their kids through stories or organizations pass on their culture through stories. The tradition of sharing knowledge through narrative is as old as humans themselves. Stories and training go hand in hand," Dr. Kapp said, scanning his bookshelf for a certain book.

"Yes, but how do I create a story that has a point, that leads to learning? No offense again, but I don't want to be like those boring trainers or faculty members who tell stories for no apparent reason. I'm determined to do it right."

"While we are all capable of telling stories, where we need help is crafting a story to meet specific instructional goals. This is where the work of my friend and colleague Rance Greene comes into play." Dr. Kapp located the book he was seeking and handed it to Sandi. It was called *Instructional Story Design* by Rance Greene.

"Rance Greene? Does he know storytelling?" Sandi raised an eyebrow as she began thumbing through the book. After a few moments, she was impressed by what she saw.

Dr. Kapp interrupted her thoughts. "He has the perfect background to teach you, and others, about instructional story design. He seamlessly meshes training and storytelling because he has been an actor, choreographer, visual artist, playwright, teacher, and speaker. Plus, because he currently works in learning and development, he knows a great deal about the convergence of learning and storytelling. He's been doing it for years."

Sandi closed the book and looked up at Dr. Kapp. He continued, "Rance has created what is called the Story Design model, which provides a step-by-step process for creating effective instructional stories. It's a wonderful and effective methodology that can help designers of instruction like you create effective, impactful learning through stories."

"Wow, this looks like a great book and that Mr. Greene sounds awesome!" Sandi replied. "He does have a great balance of training knowledge and storytelling chops. Was he really an actor? Was he on *Game of Thrones*?"

"Ah, yes, Mr. Greene was an actor but no, he wasn't on *Game of Thrones*. But more importantly for you, he is a gifted teacher. He's conducted workshops on instructional story design, developed presentations on the topic, incorporated stories into his design of instruction, and was even named by *Training* magazine as an emerging training leader. He definitely has storytelling *and* instructional design chops, as you say. And he's boiled all that knowledge down into this great book."

Enthusiastically, Sandi asks, "Hey, Dr. Kapp, can I borrow this book? I promise to give it back when I'm done."

"Keep it. Just pay it forward."

Sandi doesn't know it yet, but her approach to instructional design is about to become more memorable, actionable, and emotional.

Instructional Story Design can do the same for you. Take the advice, guidance, and information contained in this book and use the Instructional Story Design Plan to create meaningful instruction that resonates with learners and helps change behavior. In short, this book will help you create brilliant instructional stories.

—Karl M. Kapp
Professor of Instructional Technology
Bloomsburg University

INTRODUCTION
Story Design's Story

It was a cold, wet February day. I had been asked to present examples of story-designed learning solutions at a lunch & learn for ATD Dallas, and I wasn't sure how many people would actually show up. But after a few stressful minutes, fellow talent development professionals began to arrive. The room filled to capacity. Their genuine interest in seeing how stories can work for training programs was palpable, filling the room. As I demonstrated each story, the crowd seemed to recognize the teaching opportunities in store for them. As the session concluded, one of them hit me with the question that all of them were thinking: "How do you do that? How do you create stories for talent development?" I didn't have a complete answer for the question, but it stayed with me.

How *do* I write stories that teach? Coming to instructional design from theater made writing stories second nature. I loved playwriting and I loved equipping people with new skills. It was a good match. Designing instruction with stories center stage was intuitive. I hadn't had to think much about my process—until then.

That's where the journey of Story Design began. I'd already read books and articles, attended webinars, and pored over research papers that lauded the power of stories to influence and change behaviors. The psychology, the brain science, the learning theories all aligned: Stories are great for learning! The problem was that almost none of these resources offered practical advice on how to write or produce a story that trains.

The interest in storytelling for instruction that I witnessed that day in February, many years ago, inspired a mission to equip fellow talent developers with a story-building model they could easily translate into practice. It needed to be a methodology in alignment with instructional design. It needed to be simple and flexible to meet any training need. Most of all, instructional designers needed to feel empowered to take a creative leap from a foundation of sound analysis.

With these guideposts in mind, I took a critical look at my own story-making process. Patterns emerged and formed the Story Design model I present in this book. I began sharing the model with others in the field—among my peers, through online webinars, and at learning conferences. I wanted to put the model to the test. Particularly, I wanted to know if others could take the model and use it for their own training, so I developed a live online workshop. The first of such workshops attracted 22 talent development and HR professionals. The outcome was remarkable! Not only were the stories that they created during the workshop sound material for instruction, but most participants went on to apply Story Design to their own training programs. One of these first participants later contacted me with this testimonial: "After taking the Story Design Workshop, it's become second nature to use stories in nearly everything we design." I've now delivered this workshop for several years, and the results continue to prove that Story Design can be mastered . . . and it works!

The success of the workshops convinced me that Story Design is worth sharing. In these pages, you'll encounter the methodology that has worked for many others. You'll learn from stories. You'll watch stories unfold. You'll craft stories of your own. Ultimately, I hope you'll gain a new way of connecting with your learners. Because if you connect with your learners, you can train them to do anything.

Develop Your Storytelling Capability

The goal of this book is to thoroughly equip you to design stories for any training initiative on any timeline. You'll develop an ability to take full advantage of story's power and build training that connects with your audience intellectually and emotionally. Best of all, your training will prepare and motivate your audience for action.

The book is a blend of stories, theory, and practice. Each chapter begins with a narrative that follows Dayna, a young instructional designer who is struggling to meet a challenge posed to her by a stakeholder: Tell a story for training. The second section of each chapter is devoted to learning from the story, with occasional exercises. I encourage you to take these pauses in the reading to reflect on the story and complete the activities, which will prepare you for the third section of each chapter: practice! You'll be introduced to a client for whom you will design a story, applying the principles from that chapter. By the end, you will have a fully written story ready to be produced and delivered.

Chapter 1 outlines the Story Design model and why it's effective. It illustrates how Story Design seamlessly blends with the instructional design process through discovery, design, and delivery, the three phases of Story Design and the three main parts of this book.

In Part 1, discover the story through analysis of who your audience is and what you want them to do. Chapters 2 through 4 will help you successfully engage with stakeholders and subject matter experts to unearth the best story for instruction. You'll spend some time analyzing actual stakeholder conversations. You'll work with a subject matter expert to structure an action list. And you'll learn how to use some tools and templates to master similar conversations in your own work. In my workshops, I've observed that this is the most challenging phase for most participants to complete. But it is vital to master discovery before moving on to design. The foundation you lay here will determine the success of the story you build.

Next, you'll use the information you've gathered in the discovery phase to advance to part 2, where you will develop relatable characters (chapter 5) and strong conflict (chapter 6). These two chapters culminate in a final written story in chapter 7 (Build the Story). Part 2 contains practical guideposts, simple tools, and fun exercises that, with practice, will develop your own storytelling capability. Use these resources as a reference throughout your design career when you feel stuck or need a refresher.

After you've discovered and designed the story, the next logical question is, "How do I deliver this story?" Part 3 answers this question. Chapter 8 walks you through a simple process of storyboarding and some simple ways to present the story using tools that are readily available to you. Chapter 9 offers more complex ways to produce the story with many examples. More story demonstrations, plus editable versions of the tools in the book, can be accessed at needastory.com/book-resources. Once the story is fully produced, it's important to maximize its use for training. Chapter 10 shows you how to do that with a simple, effective method that encourages your learners to self-discover. This method will also open your mind to new ways of engaging your audience that would never have been possible without the story.

The last part of the book is devoted to helping you overcome common barriers to implementing Story Design. Chapter 11 begins part 4 with some inspirational case studies from companies like Southwest Airlines, Pizza Hut, and PepsiCo, who have used stories for training. You'll learn best practices and identify the Story Design principles in each case study. What may be the most inspiring part of this chapter is how different each case study is. You'll see examples of virtual training, in-person training, e-learning, and blended learning for training initiatives from new hire onboarding to leadership development. If you face resistance to stories for training, you must read chapter 12, which provides strategies and research for winning stakeholders over. As we look toward the future of our industry and the digital disruption of business, it's important to remember that stories are still, and will always be, powerful and relevant. Chapter 13 provides best practices for integrating stories into new and current training techniques and technologies. No matter how advanced the technology is, story can make the training experience even more powerful.

Every story for training needs a good designer. That's you. This book is just the beginning. I can't wait to hear how you use it.

CHAPTER ONE

Storytelling at Warp Speed

Easy Assignment

Dayna gets a call from Fayette to meet her in her office. As Dayna enters, Fayette is looking at her phone.

"Hi Fayette." Dayna sits across the desk from her.

"Look at this, Dayna." Fayette holds up her phone to show Dayna a picture of a young woman, a little younger than Dayna, with a cap and robe. Next to her is Fayette. "My baby girl."

"That's right! Her college graduation was this weekend!" Dayna smiles.

"Time goes so fast." She puts her phone down. "How's your day going?"

"Busy." Dayna brushes a piece of hair from her face and straightens her glasses.

"I'll let you get back to work. But I wanted to let you know that I just heard from Susan Chambers, a new director over in compliance. She wants training on privacy, regulations, that sort of thing. I'd like for you to take this one."

Dayna lets out a breath. "I'm already swamped."

Fayette rests her chin on her hands. "When you came on board six months ago, I knew, 'This girl is sharp!'" Dayna smiles and looks down. Fayette continues, "You're doing a great job, Dayna, and I think you can handle this one." Fayette hands Dayna a stack of papers. "Here are the policies Susan wants training on. I know you're juggling a lot of projects right now, but compliance has always made it clear that they just need to check their boxes. It'll be a fairly easy assignment."

Dayna looks at the stack of policies. "Can't we recycle last year's course?"

"Apparently Susan wants a refresh. Don't worry, it's pretty straightforward." Fayette smiles and shrugs. "It's compliance."

Dayna doesn't know it yet, but her entire world of instructional design knowledge is about to be turned upside down. Dayna spent three years out of college teaching in a middle school. She enjoyed lesson planning but felt like she wasn't cut out for the daily disciplining of her students. Her college friend, James, who is supporting his acting career as a corporate trainer, got her interested in talent development. She took a certification course in instructional design and found her calling. Dayna felt lucky to land a corporate instructional design job during the summer, just before the new school year started. She still has much to learn in applying her instructional design education to the fast-paced world of business.

And to make things even more interesting, she's going to come face-to-face with storytelling in training, something she feels very inadequate to do. Her response to the challenge will make all the difference for those required to take the course she designs. It could be a predictable "easy" course, or it could be an action-driven learning experience that resonates emotionally.

What's Your Assignment?

You may not design training for compliance. You may design safety training or leadership development programs or new hire onboarding. No matter what the content is, you care about making people better at what they do. That's why you are in this industry. But often, you are asked to churn out courses at lightning speed to keep up with the pace of business. And you find yourself checking boxes.

Who has time to write a story that makes people stop and think and immerse themselves in learning something new? The creative process can be a long and thoughtful one for those who are sculpting a marble statue or writing a novel. That's not you, though. You're developing talent. But believe it or not, you already have everything you need to start writing the best story for your audience.

We Like Stories

Your training initiatives take many forms—instructor-led, microlearning, gamification, branching scenarios, virtual reality—and underneath all of it is a solid foundation of instructional design. So why do you need stories? There are three great answers to that question.

Stories Are Memorable

When you hear the words, "So, the other day I saw this girl . . . " or "You won't believe what just happened to me!" or "Once upon a time . . .", your mind is programed to listen for a story. It knows the patterns of conflict and resolution. It pictures the characters. It puts you right in the middle of the action, as if it were your own story. You feel what the people in the story feel when they encounter something that makes them frustrated or content. And all of this happens beginning with the very first words of a story. Then, after you've heard the story, you are able to repeat it, recalling details with accuracy. Generations of oral history, teaching, and skill building can be attributed to the tradition of repeating stories.

But there's a tendency to avoid the language of stories when it comes to training. Somewhere along the way, we strayed from the tried and true. We abandoned storytelling as an instructional design skill. One of the repercussions of moving away from stories is that people remember less of what they are trained to do. With the memorable framework of stories and the brain's recognition of story patterns, instructional designers can significantly increase immediate engagement and lasting retention.

In her book, *Design for How People Learn*, Julie Dirksen puts it succinctly: "We like stories. We learn a lot from them. A well-told story can stick with us for years, even if we've only heard it once."

Stories Are Actionable

"A story is powerful because it provides the context missing from abstract prose . . . putting knowledge into a framework that is more lifelike, more true to our day-to-day existence. More like a flight simulator. Being the audience for a story isn't so passive, after all. Inside, we're getting ready to act."

—Chip Heath and Dan Heath, *Made to Stick*

Flight simulation is among one of the most powerful training tools in existence. Simulator training qualifies a pilot to fly a new airplane for the first time on a revenue flight. Undoubtedly, it is the most affordable and effective way to train pilots without having to be in the air. Why does this work? They aren't in a real airplane that's really hurtling towards the earth in an ice storm over the ocean. So, how does sitting in a machine that simulates this situation prepare them for the real deal? The pilot is living out the situation as if it were real. All of the controls that would be in the plane are there, responding to the pilot's actions. If those actions are performed accurately in the correct order, he saves the plane. If they aren't, he crashes.

Stories have a similar effect. Studies of the brain and the body have made the connection between storytelling and the chemical phenomena happening inside of us. One of the most fascinating responses is that of mirror neurons, in which the brain activity of the story-listener begins to align with the story. These neurons fire not only when you perform an action, but when you observe someone else perform it. Fictional things in the story become real in your body. As the plot unfolds, you put yourself in the shoes of the characters, living out their experiences in your mind as if they were your own. Watching the story prepares you to act. Think of the goal of training: to take action on new skills, new knowledge, and new attitudes. Stories are the flight simulator to make this happen.

Stories Are Emotional

The reason stories are memorable and actionable is because they touch our emotions. This is also the at the root of much of the resistance against stories for training. Business stakeholders who shirk at emotional language would rather appeal to the learner's intellect.

Jonathan Haidt wrote a book called *The Happiness Hypothesis*, in which the brain is compared to a rider on an elephant. The rider is rational and the elephant is emotional. Both of them influence behavior. So, when it comes to training, the rider may say, "I really should read this screen of text so I can learn something in this course." But the elephant is saying, "Are you kidding me? Order pizza!" If you only speak to the intellect and ignore the emotions of a person in training, you are missing an enormous opportunity to fully engage them. But when you speak to the rider and the elephant, you help both of them to stay on course, and they learn together.

Once, I was asked to design a live training experience for a group of employees who were struggling with effective teamwork. The problems this team had included an array of issues like favoritism, gossip, bickering, and withholding information, stemming from a root of misunderstanding. Individuals were becoming entrenched in their cliques. It resulted in low productivity and poor decision making. The department became a hotbed of compliance issues. Appealing to this group's intellect wasn't going to change anything. Instead, I designed a story that formed the centerpiece of the hour-long session. It was developed simply, in PowerPoint with stick figure characters. This story of four coffeeshop employees followed the repercussions of a careless remark and a misunderstanding that resulted in a fallout between the characters. It ended unresolved. But afterward, attendees were asked a series of open-ended questions to identify some solutions for the characters. Then they participated in activities that were designed to flesh out these solutions. Each activity referred back to the story. Because the training was closely tied to the story's emotional attributes, the learning objectives became memorable and actionable.

We know that the training was memorable and actionable because behaviors on the team changed drastically and productivity increased. We found out later that the team had adopted an easy way to remind one another when behaviors started to creep back to the way things had been before. They simply said, "Remember the coffeeshop!" They did not say, "Remember point number five on the list of healthy teamwork behaviors." They didn't need to do that because remembering the story was enough to recall everything they had learned. Why? The story touched them emotionally and made them think. It made their elephant *and* rider happy.

Our Common Language

Your brain is constantly making sense of the world around you, both intellectually and emotionally. It is processing life and forming stories. Think back on your week. How many times did you encounter a story? You read a news article, watched a video, saw a commercial. A co-worker told you about his harrowing commute and the lady who cut him off. Your kids told you about their day. The number of times you encounter stories throughout the week are innumerable.

Now think about the times you've created a story this week. Yes, created one. Perhaps you thought ahead to a difficult conversation you were going to have with someone and rehearsed it in your mind. You just created dialogue. What about the homeless person you saw on the street? You wondered how they got there in life. In a nanosecond, your brain created a mini backstory for that person. You just created a character. Someone you care about was supposed to meet you and they didn't arrive on time. You thought of every possible scenario that could be delaying them, including some far-fetched awful ones. You just created conflict. We are wired to the core for stories! It's our common language.

Stories in Talent Development

Here's what stories in talent development may look like for your learners. Your audience comes into the classroom, joins the virtual session, or opens the e-learning module. They are immediately engaged by a story involving characters they completely relate to. Your audience may laugh at something a character says or furrow their brow as a character takes action that seems inappropriate or out of place. But the entire time they are listening to the story, they are right there with the characters, living out their story vicariously, wading through conflict and thinking of how to solve their problems. Then the story ends. There are conflicts left unresolved. There's a feeling that change needs to take place. Each learner feels an instinctive desire to resolve and repair. They want to know how the story ends.

That's when the instruction takes the learners seamlessly into activities that give them a chance to explore possible solutions or offer their own solutions, followed by feedback that gives them clear guidance. On-the-job resources are available for them to consult as they make choices that advance the instruction and the story. When the training is done, they are still thinking about it, not because of the attractive bullet points but because of the story. And when they go to do their job and encounter a situation where they were trained to perform differently, they remember the story. They remember the consequences of doing things the wrong way. They remember how they felt. And they change.

Wouldn't you like to create an experience like that? There's good news! You aren't starting with a blank canvas. As a talent development professional, you are already collecting the right information. Think of the essentials you need to create training. Once you've determined that training is the best solution, there are two questions you need to answer:

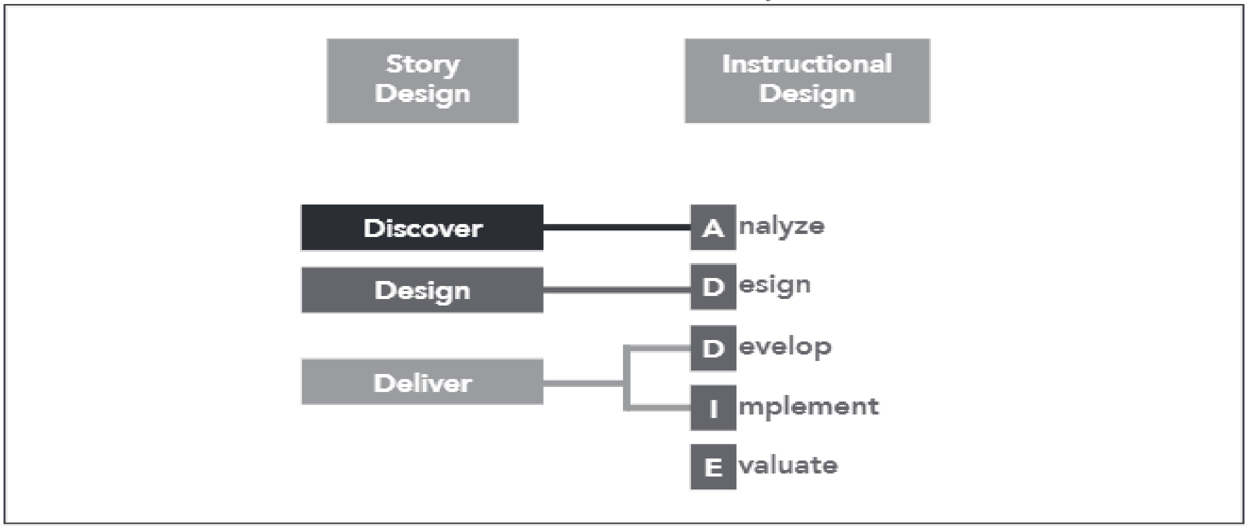
- Who is my audience?
- What do they need to do as a result of training?

The answers to these questions provide the structure of your learning solution. This is also the heart of your story. This is Story Design.

Where Instructional Design and Story Design Meet

Before plunging into the Story Design model that will form the backbone of this book, it's important to emphasize that what you are already doing during the instructional design process directly supports Story Design. Let's continue the comparison between instructional design and Story Design using the ADDIE model as a frame of reference. The instructional design process involves analysis, design, development, implementation, and evaluation (ADDIE). Used iteratively or sequentially, ADDIE is a methodology for creating effective training. There is a mirror process of Story Design that is equally methodical and effective (Figure 1-1).

Figure 1-1. ADDIE Model and Story Design Comparison



Discover

When a stakeholder comes to you or your team requesting training, you ask them questions to figure out what the root problem is and identify what the business outcome will be as a result of training. If training is the right solution, you interview subject matter experts (SMEs) to flesh out the actions learners need to take in order to meet that business outcome and alleviate the root problem. Every training initiative begins with questions, followed by analysis of the answers. Everything you design and evaluate hinges on proper analysis. You wouldn't think of designing a course if you didn't know who the audience was or what they needed to do.

As you form an audience profile and develop an action list for them, you are discovering material for characters and conflict, the essentials for storytelling and for Story Design. The intelligence you gather that is good for instruction is also good for stories.

Design

Think about how you approach the design of a course. Once you've done the analysis—you know who you are designing this course for and you know what they need to do as a result of training—what is your go-to for starting the design of instruction? Do you start a development list? Do you jump into an authoring tool? Do you storyboard? Do you write a script? Do you spend hours crafting formal learning objectives? Whether your approach to design is strictly academic, somewhat haphazard, or somewhere in between, Story Design asks you to begin your design by thinking immediately about story. In this phase, you design the characters and the conflict based on the information you've collected during the analysis and discovery phase. You write the script and determine how the story will be produced. For training, you will, of course, apply sound instructional design, including definitions, descriptions, examples, demonstrations, and practice as needed, but the story itself will set the stage for even more powerful instruction and open up innovative options for interacting with your audience.

Deliver

You've designed the course and now it's time to develop it. If you're creating training for a live audience, you may start building a slide deck based on the script and a look-and-feel you've designed. If you're developing an e-learning course, you're probably going to use an authoring tool that contains branching capabilities and built-in interactions. But hold on just a moment. You also have a story, and that needs to be developed as well. It needs to be compatible with the development and implementation of instruction. It needs to be integrated in a way that seamlessly leads the learner through the instruction. Stories are powerful no matter how they are delivered to their audience. From simple text to professional videos, a well-crafted story evokes the memorable, actionable, and emotional response you're looking for.

Evaluate

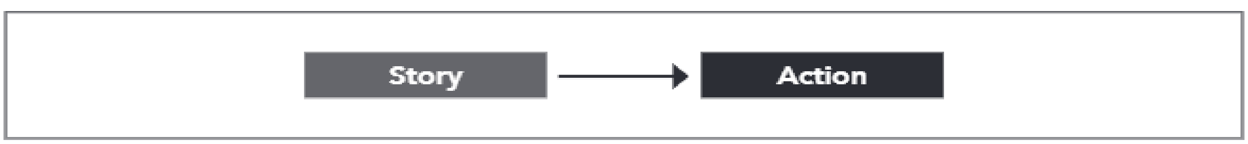
Story Design does not differ from instructional design in the realm of evaluation and, other than this paragraph, evaluating effectiveness won't be addressed in this book for the following reasons: We already know that stories have the impact we need for training. It's an established best practice, as you've read in this chapter. Implement Story Design, and skills, knowledge, and attitudes will be enhanced. Your evaluations will prove it. Business objectives will be met, and root problems conquered.

What this book will tackle is evaluating the design of the story itself. How do you know when you've got a winner? What are the red flags of ineffective stories? There are some key indicators that will help you determine the answers to these questions and ensure that your story has the maximum impact on your audience.

The Story Design Model

This book is structured to help you discover, design, and deliver stories for training, with a closing section on how to overcome common barriers to implementing Story Design. Throughout each of these sections, the Story Design model is fleshed out in detail, giving you practice with each step. To see all the parts in context, let's take a look at the Story Design model, the heart of this book. Appendix 1 contains an at-a-glance version of the Story Design model. (Visit needastory.com\book-resources to download a copy of the Story Design model and many other resources and tools used in this book.)

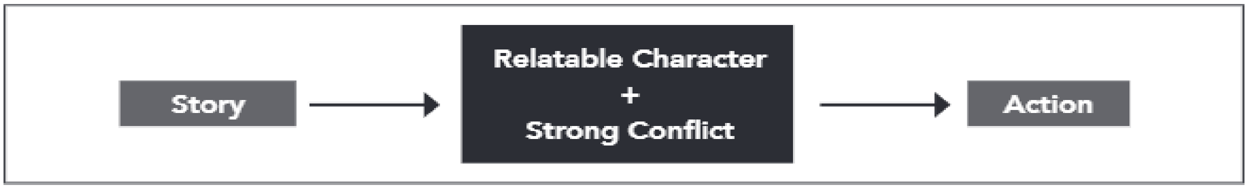
Figure 1-2. Story Design Model: Story > Action



Connecting Story to Action

Figure 1-2 shows where you stand right now. You know you want to include stories in training to equip and empower your audience to take action. There's a business outcome at stake and there's a root problem getting in the way. You want to fill the gap between telling a story for training that leads to action. Let's fill that gap.

Figure 1-3. Story Design Model: Story > Relatable Character + Strong Conflict > Action

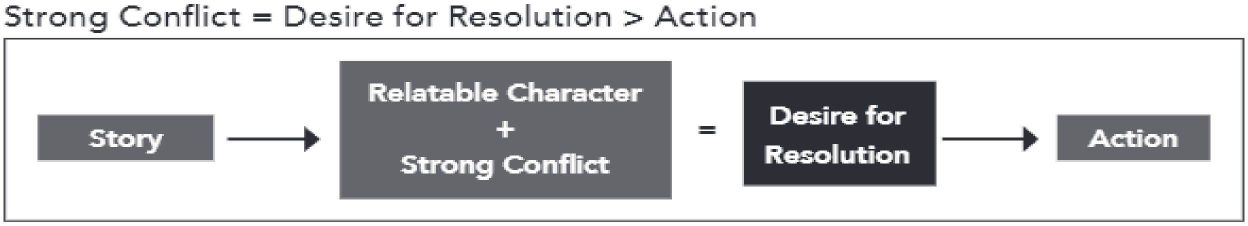


Relatable Characters in Strong Conflict

There are two essential story elements that must be present in order to tell a powerful story for training. You need characters and conflict (Figure 1-3). Not just any characters and not just any conflict. First, you need characters that your audience is going to relate to, connect with, identify with. Think of a course you recently designed. Can you think of a character that the audience of that course could relate to? If you can, you know your audience well. If you struggled to do that, you will need to collect more information on your audience. This book will show you how to do that more effectively.

The second element of the story is strong conflict. The word "strong" is used to indicate that the conflict needs to be intense enough to trigger a significant emotional response. If you think back to stories you've watched or read or listened to, the ones with the strongest conflict rise to the top as the most memorable. Think about lessons you've learned in your personal life. In which of those experiences did everything go right? Most likely, you made some mistakes when you learned those lessons. And mistakes create conflict. But where does conflict come from for stories in training? Take a look at the list of actions you're asking learners to do. Put your relatable characters in strong conflict with those actions and you have a tailormade plot for your audience.

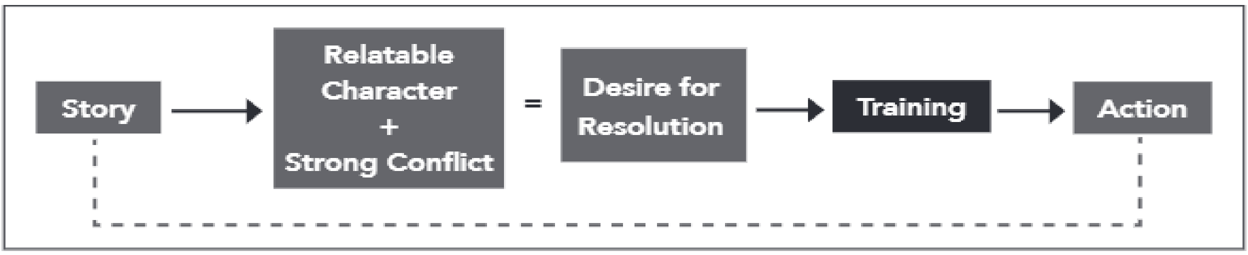
Figure 1-4. Story Design Model: Story > Relatable Character + Strong Conflict = Desire for Resolution > Action



Desire for Resolution

There is a wonderful by-product of combining relatable characters with strong conflict—learners want resolution! Their natural response is to figure out how to fix the problem (Figure 1-4). Whether or not they have a solution, they are hooked. You have their full attention. And that leads to the last piece of the model that completes the gap between story and action.

Figure 1-5. Story Design Model: Story > Relatable Character + Strong Conflict = Desire for Resolution > Training > Action



Training

Now that you have their attention and their desire to resolve, train them (Figure 1-5). The story has opened your audience up to receive new ideas, new ways of doing things, and new perspectives. Now share that new knowledge and those new skills and use the power of the story to motivate them to carry it through at work. We will spend a good deal of time in this book exploring how to integrate your story with training after you've gone through the Story Design process.

Storytelling Is a Competency

The Story Design model is simple enough to comprehend quickly because we all speak in stories. Storytelling for training has its specific challenges, but you're starting on the right foot. Like any skill, it requires the kind of in-depth study and practice you will receive in this book. Start applying the methodology for projects at work right away. Immediately, you will begin to see instructional design in a completely different light, using creative venues you've never thought of before. You'll start thinking like an Instructional Story Designer!

Training trends come and go, but storytelling has always been and will always be. Storytelling is a competency. It is foundational to the human experience and, therefore, should be a foundational skill for anyone who trains people. The more solidly you can craft a story, the better equipped you will be to adapt to the high demands placed on talent development in a world and a workforce that is constantly changing. Once you've seen Story Design's power, you'll use it everywhere. Business isn't slowing down any time soon. Don't worry, Story Design can keep up. Master the principles in this book and you'll be storytelling at warp speed.

Dayna's Story, and Yours

You'll continue to follow Dayna's journey at the top of each chapter. You'll learn from Dayna's experiences and have a chance to help her along the way. Starting with chapter 2, you will have the opportunity to put the principles you learn about to work in the closing section. In these practice sections, you are the designer. You'll meet the owner of a chiropractic clinic and use the chapter's tools and resources to discover, design, and develop a story for training his staff. The tools used in the practice sessions are compiled in a comprehensive toolkit in the appendix, including a collection of worksheets that support each stage of the Story Design process (appendix 1), an Instructional Story Design Plan Template (appendix 2), and a completed Instructional Story Design Plan with suggested outcomes for the chiropractic clinic practice sessions (appendix 3). The Instructional Story Design Plan and worksheets are also available as downloadable tools at needastory.com/book-resources; you can also view sample story solutions on the website.

PART I
Discover

Unearth potential stories through analysis of who your audience is and what you want them to do

CHAPTER TWO

Set the Stage With Stakeholders

The First Conversation

Dayna walks out of Fayette's office with a stack of compliance policies. She skims through and reads them aloud to herself. "Cybersecurity, privacy, conflicts of interest, confidentiality of information, social media, fraud, working with government clients. I'm getting sleepy already." She schedules some time with Susan, the new compliance director, for the next day and spends a couple of hours going through each policy and writing down questions for her.

The next day, she joins Susan in her office. "Thanks for meeting with me, Susan."

Susan smiles. "It's not often someone outside of compliance wants to sit down and chat about policies."

Dayna chuckles, "Yeah, I guess it's not the most exciting topic." She catches herself. "I hope that's not rude . . . "

Now Susan laughs. "Our reputation precedes us! No offense."

Dayna fumbles with the papers in her hand. "Um, I did read through each of the policies."

Susan leans back in her chair. "Any questions?"

Dayna finds her notes. "Yes, I have a few questions. First, what outcome do you expect from this training?" She's prepared for the "check-the-box" answer, but that's not the answer she gets.

Susan doesn't hesitate. "We have a mandate to provide effective training. For what outcome?" Susan pauses. "I'd say . . . to mitigate risk."

Dayna thinks about that. "OK," she says. "Um . . . " Dayna makes a note. "What kind of issues are happening in the workplace that promote risk?"

"Good question," Susan says. "A lot of the issues we're seeing have to do with lack of awareness of the policies themselves. That's why we need training."

"So, you don't think employees know what these policies say?" asks Dayna. Susan is silent. Dayna continues, "What about employees who have been here for five or more years and have taken compliance training every year?"

"OK," Susan says, "I suppose it's not always a lack of awareness. It's . . . hm . . . lack of motivation?"

"Alright." Dayna makes another note. "They may know what to do but they lack motivation to do it. Do you feel that there are some skills that they have not mastered that could be preventing them from performing in accordance with these policies?"

Susan is quick to respond, "Yes, actually, there is a new process for encrypting email that contains sensitive information. Employees have been slow to use it."

Dayna takes a note. "So, would this be a cybersecurity issue?"

"More of a privacy issue," Susan explains. "But we also have a cybersecurity issue. We've seen a spike in cases where employees unknowingly introduce viruses to our network."

Dayna asks, "How does that happen?"

"They receive a phishing email with an attachment or link that contains malware."

Dayna makes a note to ask for examples of phishing emails and clarifies, "So employees are opening those attachments or clicking on the links?"

"Exactly," says Susan.

"Alright, those sound like some specific training needs," says Dayna. "Are there any others?"

"Not that I can think of, but those two are important. If employees could master those two things, we'd see a huge difference in the number of incidents that are taking employees away from their jobs to fix."

Dayna holds up the stack of policies. "This is a lot of policy to cover in one course. Since the privacy and cybersecurity issues rise to the top as concerns, would it be alright to design a series of shorter courses that focus on one or two topics at a time? I think it will increase retention."

"That's a great approach. I want these two issues dealt with first. Then we can move on to the other policies."

"Is there someone in cybersecurity or the privacy office who I can speak with to talk through some of the details? Some of the skills you mentioned don't appear in the policies."

"I'll introduce you to Randall. He's in compliance but communicates frequently with all of our sister departments. He's helped orient me to our procedures and policies this past month. I think he's in a meeting right now. Can you stop by this time tomorrow?" asks Susan.

"That would be great!" Dayna stands up.

"One last thing," Susan says. "I'd like to make this training . . . " She thinks for a second. " . . . engaging. It's important that employees know what to do with all of these policies and regulations, so I want it to be as practical as possible." Dayna had never heard anyone in compliance say anything close to that before.

"OK, and what does *engaging* look like to you?" she asks.

Susan looks up toward the corner of the ceiling. Dayna shifts her weight, waiting. Susan's brow furrows. Then, a small smile. She almost speaks, but instead picks up her pen and scribbles something on a sticky note in front of her and hands it to Dayna.

"That's what engages me."

Dayna looks at the yellow note and reads it out loud. "I love a good story?" It comes out as a question.

"Tell me a story and you've got me!" Susan smiles. Dayna halfway smiles back. She isn't sure what to say to that.

"Thanks for stopping by, Dayna. And let me know if I can clarify anything."

"Sure," she replies. There's a lot she wants to clarify, but before she can think, she's already on the way out the door. "Thank you," she says over her shoulder, "I'll stop by tomorrow." She walks away. There's only one thing on her mind: *I love a good story? What does she think I am, a novelist?*

Your Story on Stage

Let's pretend, for a moment, that the story you are going to design for training will be produced in a theater. Your story for instruction is like the bare stage, begging for scenery, lights, and, of course, action! You will need designers for the set, lights and costumes and skilled carpenters and costume builders. You'll want some backstage hands and a stage manager and operators to run the lights and sound. You'll need a producer to provide some financial backing and box office staff to handle customers on the front end. There are a lot of people involved in making your story come to life.

Since it's your story, you'll want to create a certain mood. You'll want all of the designers to be on the same page, so you'll have to communicate your vision for the story to them. You may want the story to take place in a certain locale and in a certain period of time, which will affect what the actors will wear and how they will talk. You want the story to have a certain pace, so you'll need to help the actors with that and tell them where and when they should enter the stage. The collaborative effort needed to create an experience that the audience will enjoy must be deliberate. Your story will not spring to life without a clear direction at every level of the design and production process. It's the role of the director—you—that influences all the key players to make the biggest impact on your audience. The director is at the heart of the story-making process.

You can imagine how the story might turn out if your set designer built a modern cityscape, the costumes were 18th-century French, and the lighting designer went with a disco theme. It'd be a disaster. But, as the director, you know who your audience is and how to best reach them with the story. As the designer of a learning program or an individual course, you are in a similar position. You're setting the stage for learning. The analysis you're already doing for instruction can work for your story too.

You are central to the process, but that process often begins with a meeting between you and the stakeholders. This is your opportunity to find out what's going on in the stakeholders' minds. Why are they asking for training? What are the expected outcomes? The result of this conversation usually initiates the eventual solution. And depending on how that conversation goes, the solution will make a business impact . . . or not. There are some things you can do during this conversation to ensure a successful outcome.

The Stakeholder Conversation

You'll come back to Dayna's concerns about story writing, but first, reflect on Dayna's questions during the stakeholder interview. Dayna did a good job navigating the conversation, but were there some questions she should have asked that she didn't? And what was the purpose of the conversation? What does she know now that she didn't know before she walked into her office?

As you prepare for the stakeholder conversation, there are three questions that must be answered to set the stage for good instruction and a winning story:

1. What is the desired business outcome?
2. What is the root problem?
3. Is training the ideal solution?

Looking at her conversation with Susan, how would you answer these questions? Pause for a moment and look back at the conversation to see if the answers are there.

The Business Outcome

Dayna actually starts the conversation with a direct question regarding the desired business outcome, and Susan gives her an answer: mitigate risk. This is a good place to start. Dayna could ask a few more questions to dig a little deeper to find out how mitigating risk will affect the business. Susan later hints at another business outcome when she says, "If employees could master those two things, we'd see a huge difference in the number of incidents that are taking employees away from their jobs to fix." Ah! A quantifiable outcome. Dayna can help her stakeholder quantify the effectiveness of training or other interventions by comparing the number of incidents before and after training. To show business impact, Susan can take the number of hours it takes to correct incidents and place a monetary value to that number. The two outcomes Dayna can suggest to Susan, that training can help affect are:

- **A privacy outcome**: Reduce the number of unencrypted emails containing sensitive information to outside parties.
- **A cybersecurity outcome**: Reduce the number of incidents in which employees introduce a virus to the company system through a phishing email.

Compliance training is often a mishmash of policies owned by different departments to ensure the company is operating within the law, so there are several business outcomes to identify. Dayna's instinct to limit the course to the highest risk items was a good one. The rest of Dayna's story will focus on training for the privacy and cybersecurity outcomes. Dayna can help stakeholders think through what each business outcome may be. Assuming that most compliance training outcomes have the ultimate goal of reducing risk and, therefore, unnecessary costs, it will help to bring the outcome down to a level that the stakeholder can initially measure. More examples of business outcomes for compliance training may be:

- increase in reports to the hotline
- decrease in workplace accidents
- shortened turnaround time in reporting noncompliance.

This will not only help Dayna determine the success of the training, but it will also help the stakeholder speak to senior leadership in business value terms. The credibility of the stakeholder increases, and the training function of the organization is viewed as a business partner.

The Root Problem

How would you describe the root problem that Dayna's training solution is going to help employees overcome? What obstacle is preventing the desired business outcome? In compliance training, unless there is a new process or a new skill to learn, the answer is rarely a lack of knowledge. Dayna called this out in her conversation, and she's right. Susan suggested that the root problem may be lack of motivation to act on what employees already know how to do. Dayna would be wise to follow up on this information and find out why. She will also need to follow up with the subject matter expert on the new process of encrypting email that contains confidential information.

So far, from the conversation, you could infer that the root problem for each business outcome is:

- **A privacy problem**: Employees lack the knowledge (or motivation) to encrypt email correctly, putting the confidential information at risk.
- **A cybersecurity problem**: Employees lack the skills to detect and mitigate the risk of phishing emails that expose the company to malware and give hackers valuable confidential company information when employees click on links or open attachments.

The two skills Susan mentioned (encrypting email and properly handling phishing emails) seem to be things the employees already know how to do. But some employees aren't doing it. Who are those employees? How many of them are there? Why do they continue to fall short in performing the skills? How long has the new way of encrypting emails been in place? Has everyone been trained on it? Without a clear root cause, it's very difficult to design training that will truly enable and motivate her learners to perform in compliance. The root problem question needs an answer. Assuming that Susan is right—employees are unmotivated to encrypt emails the new way—Dayna will need to find out what is causing this underlying attitude.

One of the most important reasons to pursue an answer to the root problem question is because it will indicate whether or not training is the solution, and what kind of training solution to implement.

The Ideal Solution

Is training the ideal solution to achieve the business outcome and overcome the root problem? To answer this question, think in terms of knowledge, skills, and attitude (KSA).

Imagine the information from stakeholders coming down into a filter that separates those answers into two main categories: training solutions and other solutions. It is in the best interest of the business to make a clear distinction between these categories and tell stakeholders what the ideal solution is. When you know the business outcome and the root problem, the ideal solution is evident. Either the solution is within the scope of training to make a difference through increasing knowledge, training skills, or impacting attitudes; or the solution is outside the scope of training and would best be affected by changing something in the work environment, like processes or systems (Figure 2-1).

Figure 2-1. KSA Filter

Use the KSA Filter in Conversations

Imagine you enter the stakeholder's office. You know you need to walk out of that office with a business outcome and a root problem to determine the ideal solution. If training is the solution, these three factors combine to formulate a clear goal for training. The following series of conversations with stakeholders will give you practice thinking in this way. Conversations are shortened, but each contains what you are looking for. The conversation is followed by possible answers, but take time to see if you can identify them for yourself before reading on.

Customer Service Training

Stakeholder: We need customer service training.

You: Can you give me an example of what's happening that brought this to your attention?

Stakeholder: Well, our customer satisfaction scores are way down.

You: What's one of the stories you've heard that illustrates why customers may be unhappy?

Stakeholder: Mostly that staff is just unfriendly, inattentive.

You: Do *you* feel that the staff is unfriendly and inattentive?

Stakeholder: No, we hire good people. I think they just need better training.

You: That may be a good solution, but before we do that, is there anything else to consider? Are they distracted by anything that could prevent them from giving good customer service?

Stakeholder: With all of the new regulations, my staff has more paperwork than we can handle!

What is the business outcome, root problem, and ideal solution? Based on this limited conversation, you might say:

- **Business outcome**: Increase in customer satisfaction scores.
- **Root problem**: Paperwork is overwhelming staff.
- **Ideal solution**: Increase efficiency of paperwork so staff can focus on customer service; training is not the answer.

When Training Isn't the Solution

In the customer service stakeholder conversation, the problem with customer satisfaction scores has more to do with inefficient paperwork processes than actual customer service knowledge, skills, or attitudes (KSA). This doesn't mean, after further discussion, that KSA issues might not come up. But in this snippet of conversation, it appears that the bigger problem lies outside the realm of training. To truly affect the business outcome, the paperwork efficiency problem should be addressed. Though you may not have influence to implement those changes, you can help the stakeholder see more clearly that throwing training at the problem will not fix it. Plus, you've helped them identify the business outcome and root problem.

Some signs that you are dealing with a work environment problem include staff who cannot perform because of broken systems, inefficient processes, or negative pressures in the workplace. Negative pressures might include unreasonable production expectations, interpersonal conflicts, and stressful changes within the organization. You can consider nontraining solutions such as fixing broken systems, streamlining inefficient processes, and relieving workplace pressures.

It is worth noting that the implementation of work environment fixes may produce a true need for training, such as how to use a new system or process or training on change management or communication skills.

Sales Training

Stakeholder: My associates need sales training.

You: What brought this need to your attention?

Stakeholder: Sales numbers are awful!

You: Help me understand what's behind the numbers. Give me an example of what's driving those numbers down.

Stakeholder: They are constantly caught off guard when customers ask them tough questions.

You: What are the nature of those questions?

Stakeholder: I think they usually have to do with industry trends and how our product can help with things my associates have no idea about.

You: OK, it sounds like they are winging it and not hiding it very well.

Stakeholder: Exactly!

Early in this conversation, the business outcome, root problem, and ideal solution are beginning to show themselves. Do you see them?

- **Business outcome**: Increase sales numbers.
- **Root problem**: Lack of industry knowledge.
- **Ideal solution**: Increase business acumen.
- **Goal of training**: Increase sales numbers by 4 percent by end of Q3 by increasing the business acumen of sales associates to accurately and confidently explain industry trends and product application to clients' needs.

The root problem indicates a knowledge problem. Training can help the sales team increase their business acumen. Here's how:

- **Signs of a knowledge problem**: Simple. Learners don't have the information they need to perform. If they had the knowledge, they would be able to perform successfully.
- **Instructional design for knowledge**: Design problem-solving activities and provide job aids in a form that is easily accessible to the learner.
- **Story Design for knowledge**: Look for case studies. How are things actually playing out at work as a result of lack of knowledge? In your conversation with this stakeholder, you will want to ask for sample discussions sales people have had with clients. Talk with sales reps or their managers. Get the specifics on the flow of the conversation. This will help you instructionally as you pinpoint where the lack of knowledge kills the sale, but it will also help you construct a story that reflects real-world sales experiences that demonstrate common mistakes. Case studies are discussed in detail later.

The Goal of Training

Combining the business outcome, root problem, and ideal solution results in the ultimate goal for training, with some added details by the stakeholder. The goal should be constructed similar to this:

Eliminate the root problem + to achieve the business outcome + by implementing the training solution.

Notice that the goal for training in the sales scenario indicates a specific percentage of increased sales by a certain time (4 percent by end of Q3). Stakeholders will help determine these details. Notice also that training for lack of knowledge results in specific actions (to accurately and confidently explain industry trends and product application to clients' needs) to achieve the goal of increasing sales. The goal of training serves as a guiding light for both the stakeholder and the instructional designer and should be agreed upon before training is designed. It also brings clear focus to the story and keeps the characters and conflict centered upon the ultimate goal.

The goal itself hints at a story. It provides the relatable characters (sales associates) and the source of conflict (they currently are not confident to explain industry trends and applications of their products to their clients' needs). Solid analysis during the stakeholder conversations will result in powerful, targeted stories.

With what Dayna knows now, an example of the training goals Dayna might construct with Susan could look like this:

- **A privacy office outcome**: Reduce the number of unencrypted emails containing sensitive information to outside parties (root problem) 15 percent by June 15 (business outcome) as employees encrypt email correctly (training solution).
- **A cybersecurity outcome**: Reduce the number of incidents in which employees introduce a virus to the company system through a phishing email (root problem) 30 percent by September 27 (business outcome) as employees detect and mitigate the risk of phishing emails (training solution).

The training solution of encrypting email correctly is specific and observable. The cybersecurity training solution of mitigating risk of phishing emails needs more, but Dayna will uncover more information about what employees need to do during her conversation with Randall. Asking stakeholders to commit to specific outcomes is important to measure the impact of training upon business. It's not always easy to gain that commitment, and sometimes it's impossible. You may be designing compliance training, like Dayna. You've been told that it's required training and that's all you're going to get. Or stakeholders haven't been tracking any numbers and have nothing measurable to compare results to. In such cases, you may be limited to measuring knowledge, skills, and attitude, but at the very least, your training goal must identify who your audience is and what they need to do as a result of training. You must push stakeholders and subject matter experts beyond awareness and give employees concrete steps to take.

New Hire Onboarding

Stakeholder: I need a better new-hire onboarding program.

You: What's wrong with your current onboarding program?

Stakeholder: It doesn't seem to resonate with employees. We lose a lot of them after the first three months!

You: What insights have you received from employees during exit interviews?

Stakeholder: Not much. Some of them complain about too much work.

You: Can we take a look at the exit interview reports?

Stakeholder: Sure.

Report: "I feel like a number." "Management is not responsive to employee needs. I waited three weeks for system access and my manager never helped me." "I work really hard, but my work is not appreciated."

You: It looks like the reason why many of these employees are leaving has more to do with management. What is your turnover rate?

Stakeholder: Thirty-one percent.

You: What kind of training do your managers receive?

Stakeholder: They learn on the job.

The stakeholder, in this conversation, comes with a solution, but after investigation, the root problem suggests a different one. What is the business outcome and root problem?

- **Business outcome**: Decrease turnover.
- **Root problem**: Management struggles to build effective teams.
- **Ideal solution**: Develop managers' team building skills.
- **Goal of training**: Decrease turnover 9 percent by Q2 as managers build more effective teams. (This is a good start. Training managers to build effective teams is complex, so you will likely create some sub-goals to this larger one.)

Here's how training can solve a skills problem:

- **Signs of a skills problem**: Is it reasonable to think that the learner can be proficient without practice? If not, you're dealing with a skill. In this case, there could be some environmental factors that prevent managers from spending as much time as they'd like with their teams, but assuming the evidence is consistent and that no manager training is offered, it's reasonable to assume a skills need.
- **Instructional design for skills**: Practice! Simulate the actual work environment and give learners hands-on practice with the skills. Think of the flight simulator. Use role play in live settings and scenario-based training for e-learning. Games are great for skill building too.
- **Story Design for skills**: The importance of designing stories that are concretely connected to the actions that learners need to take is paramount in skill-building. Stories are the core of scenario-based training and often of games. Mastering the principles of Story Design will also increase the effectiveness of these and other forms of instruction that are particularly useful in building skills. You'll learn more about how to strengthen scenarios and games with stories in chapter 13.

Systems Training

Stakeholder: My staff needs more training on our new data entry processes.

You: What brought this need to your attention?

Stakeholder: Reporting. My staff is supposed to enter data in a certain way. Reporting is messed up, so they can't be entering the data correctly.

You: It sounds like you have trained them on the new data entry process before. Is that right?

Stakeholder: Of course!

You: Is it a difficult process?

Stakeholder: Not really. They're just not willing to make the change! If you ask me, they're just being stubborn.

You: Did you tell them that the data would be used to create reports?

Stakeholder: No, they're not involved with reporting. They just need to enter the data correctly!

It sounds like the stakeholder is a bit exasperated in this conversation, for good reason. Systems training has been provided and still things aren't working as they should be. After some questioning of supervisors in the area, you confirm that everyone on the team has the knowledge and skills to enter data the new way. So what gives? Are they really being stubborn? Maybe. Read the conversation again and see if you spot the business outcome and root problem. Also see if you can determine the ideal solution.

- **Business outcome**: Increase accuracy of reporting.
- **Root problem**: Staff doesn't realize the impact of the new data entry process.
- **Ideas solution**: Give staff the full picture from data entry to reporting as part of the training.

- **Goal of training**: Increase the accuracy of reporting 50 percent by end of the month as data entry team enters data correctly using the new process. (Notice, the goal still focuses on what employees will do. You will still give employees the full picture, but it's the entering of data correctly that will fix the reporting problem.)

Keep the following in mind when designing a solution for attitude:

- **Signs of an attitude problem**: Remember, attitude refers to how important learners feel it is to change the way they do something. You caught that, right? The way they *feel* affects performance. Are learners asking, "Why are we doing this?" or "What's in this for me?" Are learners unaware of the entire process? It could be that this team took the systems training as a suggestion, not a command, so they glossed over it as unimportant. It could be that they felt the change in process was unnecessary or inefficient and therefore less important than the old way. It's not likely that they are plain stubborn.
- **Instructional design for attitude**: Every course should include its purpose, importance, and benefits to the learner, co-workers, and customers. Give the learners the big picture and show them how their piece of the process fits into that picture. Tell them how entering data correctly affects reporting.
- **Story Design for attitude**: The benefits of doing things correctly provide a treasure trove of plot lines. And since stories thrive on conflict, your plot will include negative consequences that demonstrate the opposite of those benefits. Pick up on prevailing negative attitudes and incorporate them into the story to help drive the emotional impact and ultimately empower your audience to embrace the benefits. If your audience needs to see the bigger picture or is confused by the process, use a metaphor to relate this new process to something they are already familiar with.

Training for Attitude

Importance is at the core of attitude, akin to motivation. How important is it to the learner that the knowledge or skill be implemented? If the weight of importance is low, there's an attitude problem. There are questions Dayna can ask to explore the attitudes of employees toward email encryption: Are managers telling employees to do it the old way? She may need to restrict training to managers. Is the new way more difficult? She may need to explain why the more difficult way is necessary. If the new way is a recent change, have all employees been trained yet? There may be an actual knowledge gap. Dayna will need to keep asking questions until a root problem for each business outcome is identified and agreed upon by the stakeholders. This includes root problems stemming from attitude.

It's good to identify existing attitudes in the workplace toward the new behavior you are asking learners to adopt. To counteract negative attitudes, work with stakeholders and SMEs to clearly articulate the importance of training. Designing *importance* into the training through storytelling positively affects learners' attitudes toward behavior change. Don't throw out lack of motivation as a nontraining issue. Capture those attitudes in your interviews. You will use them later in your stories to drive the emotional impact of the training.

To overcome prevailing negative attitudes, it may not be enough for learners to know why training is important. Learners also want to know the benefits. What's in it for them? Regarding the encryption problem in Dayna's story, if an employee encrypts email properly, it protects the confidentiality of information of the customer and reduces risk to the company. Their behavior benefits the customer and the company, but what's in it for the employee personally? Perhaps, in the end, they save time by encrypting it correctly. Maybe they get a boost in their quality review at the end of the month. Ask stakeholders and SMEs directly, "What's in it for the employee if they do this?" and keep a record. You'll use the benefits as you build the plot for your story later.

For both the privacy and cybersecurity issues, knowledge, skills, and attitude are factors in solving the problem. Dayna can move forward with confidence that training will positively affect the business outcome.

Designing in Reality

Though the previous examples are somewhat clear cut, you do not work in a vacuum. There will almost always be a mix of root problems that require the proper mix of solutions. The new hire onboarding example that turned into manager training is focused on skill-building. But you will also need to make a clear case for what's in it for the learners (attitude), since you will be asking managers to do something different and perhaps inconvenient and initially time consuming. Along the way, you may unearth some work environment issues, such as inefficient processes that could be streamlined to give managers more time to spend on team building.

To uncomplicate real life without over-simplifying it, put your efforts toward defining the business outcome, the root problem, and training's part in the solution. Then focus on understanding who your audience is and what they should do as a result of training.

PRIMED for Stories

You never quite know what to expect when going into stakeholder interviews. Will they be skeptical of the process? Will they cooperate? Will they answer in complete sentences? More importantly, will the stakeholder provide the insight to identify the root problem and the business outcome? Your role is to help bring focus to that conversation by asking questions that will unearth the root problem and the business outcome. You'll also be looking for possible stories for training during the stakeholder interview.

Water pumps, whether the old-fashioned hand-cranked types or modern electric pumps, rely on water pressure and suction to pull water through and get it flowing. For that to happen, the pump must already have some water in the works. If it doesn't, it means the pump has lost its prime, and water will not flow. Think of your questions as the prime that gets the information flowing out of your stakeholder. Let's use an easy-to-remember mnemonic—PRIMED—to frame each category of question.

PRIMED will help you remember the questions you need to ask to keep the information pump primed (Figure 2-2). Keep in mind that PRIMED is a framework of question types that can be asked in any order, depending on the flow of the conversation. Download the PRIMED questions and other resources at needastory.com/book-resources or refer to it in the appendix.

Figure 2-2. PRIMED Questions

Ask Stakeholders for...

Personal Opinions
Real Stories
Initial Indicators
Metrics
Examples
Distractions

Personal Opinions

"What do you feel the root problem is? What would you like to see change as a result of training?"

Asking the stakeholder's personal opinion will go a long way in building relationship and winning complete buy-in to the final solution. Asking them directly what they believe the root problem or business outcome to be could cut right to the chase, but use this option with caution and define what is meant by *business outcome* and *root problem*. Personal opinion questions work very well with stakeholders you have worked with before who are familiar with your process. Dayna used a form of this question with Susan when she asked, "What outcome do you expect from this training?"

Real Stories

"Can you share a real story that illustrates the problem? Can you provide a case study?"

Listen for root problems—behaviors or systems that can be changed or fixed—when stakeholders answer this question. Also, listen for stories that can be used in the course to provide context for the learning objectives. Real stories can be modified or they can be used as actual case studies, depending on the sensitivity of the content. Identify the characters and the conflict and build stories that mirror those real situations.

Initial Indicators

"What brought this problem to your attention? Describe how you became aware that training was needed."

This is a great opening question. It immediately turns the conversation away from assumed solutions and toward the root problem. Look for the business outcome: a measurable difference in the business, such as an increase or decrease in numbers, scores, or behaviors. If they became aware of the issue second-hand, you may need to dig a bit further or speak to someone with firsthand knowledge.

Metrics

"Can I take a look at the survey results? What are the reports indicating in regard to this problem?"

Data tells a story. If the stakeholder relies on metrics to make business decisions routinely, it will be easier to keep the conversation focused on moving those numbers. Depending on the type of data you are reviewing, you may find the business outcome in the numbers, or you may discover the root problem in qualitative feedback. If metrics are not immediately available, try an initial indicator question.

Examples

"Can you provide an example of the kinds of issues you've noticed in regard to this problem?"

This is a good warm-up question. Expect to receive general, though valuable, observations in response: "They need better people skills. Trends indicate a problem with data security. Employees are being careless." This question is often best followed by a real stories or metrics question to flesh out each of the examples provided.

Distractions

"Is there anything distracting employees from performing their jobs well? If training was not available, what would you change?"

Ask this question when you are uncertain that training will fix the problem. Look for answers that indicate work environment issues or broken processes. In the customer service example earlier, it was an overwhelming amount of paperwork that was hindering staff from performing optimally. Fixing the paperwork problem will also help fix the customer service problem.

Figure 2-3. The Combined Power of PRIMED and the KSA Filter

Armed with questions to prime stakeholders and the KSA filter, you will skillfully navigate stakeholder meetings and ultimately discover the business outcome, the root problem, the ideal solution and lots of story ideas (Figure 2-3). The stage is set!

PRACTICE STORY DESIGN: Meet Your Client

This is the first practice session. Meet Dr. Kobal, the owner of Well Adjusted, a fictional chiropractic clinic. Dr. Kobal is having problems with his staff. You're going to design a story for instruction that will make a significant difference in the lives of his employees. Take a moment at the end of each chapter to apply the principles and get to know Dr. Kobal and the Well Adjusted staff along the way. Your first task is to ascertain the business outcome, the root problem, and the ideal solution. Read the conversation below and record your observations. Suggested answers are contained in appendix 3, but complete the exercise on your own first.

You arrive at Well Adjusted and tell the young lady at the front desk that you're there to speak with Dr. Kobal. "Are you new patient?" she asks.

"No, I'm not here for an adjustment. I have an appointment to speak with him about some business priorities."

The young lady stares back at you. She looks over her shoulder toward another woman who's taking files out of a drawer and placing them on the desk. "Um . . . Carrie?"

Carrie keeps working on the files. "Hm?"

"There's someone here to see Dr. Kobal."

Carrie looks up. "Do you have an appointment?"

"Yes," you say, then clarify, "I have an appointment to *speak* with Dr. Kobal."

"Oh, you're not here for an appointment?" Carrie walks up to the front desk and pulls out a calendar. "What's your name?"

You tell Carrie your name. Carrie shakes her head. You pull out your phone and open the email from Dr. Kobal. "He asked me to meet him here in the waiting room at 8:30 a.m. I'm a little early, so maybe I should just wait over here?"

Carrie picks up the phone and quickly dials. "Sure, have a seat. I'll see if I can . . . " She speaks into the phone. "Hey, Breanne, have you seen Dr. Kobal? There's someone . . . " She looks up at you. "Sorry, what did you say your name was again?"

At that moment, the door to the back office opens and a tall man strides into the room, open and smiling. "I'm glad you made it!" His voice is booming and happy. He shakes your hand. "I'm Dr. Kobal. Come on back to my office." As you walk with him, he calls over his shoulder, "Thanks, Carrie! Thanks, Janine!" He turns back to you. "Janine just started yesterday." He shows you to a large leather chair. His office is big. Pictures of his grandchildren line the wall. His desk and bookshelves are peppered with mementos from his trips abroad. Massive amounts of paper are stacked on every surface. "Can I get you a drink?" He's already opening a mini fridge.

"Sure, water would be nice. Thanks, Dr. Kobal," you say.

"That's actually one of the problems," Dr. Kobal says as he sits down. His broad frame dwarfs the desk chair.

You take out a notebook. "I'm sorry, what's one of the problems?"

Dr. Kobal cracks opens a seltzer and leans back in the chair. "Turnover." He motions toward the wall in the general direction of the front desk.

"Oh, the front desk?" you ask.

"Front desk, therapists, back office." He takes a gulp of seltzer. "Even the doctors! Turnover is bad. We're constantly training new staff."

"Why do you think that is?"

"I'm not sure. We have competitive pay. It's just . . . I don't know. We hire a lot of young people? Some of our doctors go on to start their own practice after a couple of years."

"When did you first notice this problem?"

Dr. Kobal laughs. "I can't remember . . . well, in my younger days, I was a lot more involved with the employees than I am now. But I have a good office manager: Brandi. She keeps things running for me. And my sister stops by every once in a while to help me manage . . . " He motions to the stacks of paperwork. " . . . this!" He chuckles and looks over his glasses at you. "I do actually know where to find things, believe it or not."

You smile. "Would you say that during the days when you were more involved with employees that turnover was less?"

"Absolutely! For 20 years, I practically had the same staff."

"Sounds like you already know how to run a successful office," you say.

"Well"—Dr. Kobal raises his eyebrows—"Yes, I do."

"When you passed responsibilities over to your office manager, did you coach them on how to do what you did to keep people engaged?"

"Hm. Yes, at first I did, but that was three office managers ago. I think I see where you're coming from. I should spend time with Brandi." He furrows his brow. "I can do that. But I feel like there's some other issues in the office that need to be fixed. I can't put my finger on it, but it's affecting our clients."

"In what way?" you ask.

"Well, see, a lot of people come in because they have injuries. They come for the first visit, then many of them don't ever come again to finish their therapy plan. Plus, our steady clients who come in for maintenance check-ups have steadily decreased."

"Why do you think there's been a decrease in customer loyalty?"

He puts his hand to his chin. "What do you think?"

You pause. "The high staff turnover could have something to do with the high client turnover. Maybe there's a common root problem?"

Dr. Kobal nods slowly. "Loyalty. You know, I had a mentor in college who told me trust was the foundation of every successful business."

You prompt him, saying, "And you feel like there's a connection between loyalty and trust?"

Dr. Kobal continues your thought. "Our clients aren't loyal. My own staff isn't loyal!"

"Do you see signs of lack of trust among your staff?" you ask.

"I'm not around them as much anymore. I'm not sure."

"What if I spend some time observing how your staff interacts with one another and with clients. Would that be OK?"

"Of course!" He stands. "You can start right now!"

"Good. I'll come by again this time next week to share my observations with you. Then we can work on building loyalty among your staff and your clients."

Dr. Kobal walks you to the back office and introduces you to the staff. He takes you through the open waiting room and front desk area and down the hallway to the examination rooms where patients are being adjusted. You meet a couple of the doctors. They smile and nod politely. In the therapy bay, you meet two ladies and a high-school-aged boy dressed in scrubs chatting in a small huddle. A few patients are doing exercises or lying down for electrostimulation treatments. They break from their conversation long enough to greet you. Dr. Kobal sees one of the patients wincing as they perform a shoulder exercise. He goes to them and gives them some pointers. They thank him. He walks back over to you. "If you need anything, please let me know. Feel free to stop by anytime this week." In three long steps, he exits the therapy bay.

You settle down and spend time observing the staff in the therapy bay. You come back two more times to observe each of the four main areas of the practice. These are your observations:

- Key information about patients, such as appointments, ailments, prescribed therapy, and financial matters, are not effectively communicated between the four areas of the practice.
- Staff often gossips about other staff members within earshot of their clients.
- During treatment and in the waiting room, staff members will talk loudly about their personal business with other staff members.
- Staff members will discuss clients' conditions in the presence of other clients, especially during therapy.

At the end of the week, you look over your notes on your conversation with Dr. Kobal and the list of observations. Answer the questions below to formulate your suggestions to Dr. Kobal next week.

What are the measurable business outcomes?

What's the root problem?

What are the ideal solutions?

After you've recorded your thoughts, you may compare your conclusions with the completed Instructional Story Design Plan in appendix 3. When you return to the story in chapter 3, you'll formulate the goal for training and begin the process of getting to know the staff at the clinic.

CHAPTER THREE

Your Audience

The Question Mark Grill

That evening, Dayna meets some of her college friends at the Question Mark Grill. James, a theater major turned corporate trainer and the person responsible for introducing her to talent development, is there.

"Hey Dayna! How's the job going?" asks James.

"Full of surprises lately," she says.

"How so?" James and Dayna find a vacant table near the bar.

Dayan slides into her seat. "Well, I had a meeting with a compliance director today and something she said is bugging me. She wants compliance training."

James sits across from her. "And that's bugging you? Come on, compliance is a blast!" he teases.

Dayna shakes her head. "This should have been an easy project. Just a bunch of boring policies that people need to know about. Awareness stuff, you know."

"Hm," he says thoughtfully. "Awareness . . . I don't know. Wouldn't you put awareness into the same category as marketing or communications? Is that really the realm of training?"

"What?"

James eats a chip, then continues, "Think about it. What should you actually do if you are aware of something? Shouldn't you focus on that?"

Dayna looks at James sideways. "Focus on what?"

"Focus on the action. Like theater. When you read the policy, what are you supposed to do with it? It's like an actor reading a script and just . . . you know, you can't just read it. You've got to act!"

"That's what Susan said."

"Who?"

"Susan, the compliance director. She said that too."

"She talked about theater? I like this lady!"

"No, she said it was important for employees to know what to do with the policies. And of course, I agree, but . . . "

"Did she give you some examples?"

"Yeah, she gave a couple of ideas. I meet with the subject matter expert tomorrow. I'll ask him."

"Well, what do the polices say? You read them, right?"

"Yeah."

"What do they say you're supposed to do?"

"Have you read a corporate policy lately? They don't tell you to do anything. They tell you not to do things."

"Good point," he says, but he's still thinking. "But what if during one of my sales training classes, all I did was teach sales people what not to do. How is that going to help them?"

"That's an interesting way to put it." Dayna thinks a minute. "But compliance is different."

"How?" he asks. "If you aren't training people to do something, how can you call it training?"

"Yeah," she concedes. "But seriously, the policies are basically a list of 'do nots.' To your point, they're more like, what would you call it? Nonperformance?"

James laughs, "I can just see the looks I'd get if I started my class with: 'Ladies and gentlemen, let's review the non-learning objectives before we get started.'"

Dayna smiles. "Anyway, that wasn't the surprise."

"OK." James is still laughing. "What was the surprise?"

"So Susan—she's the compliance director—is going through her list of compliance topics, right? Everything is boring and fine, and then she asks me if I can make the course engaging!"

"Really? That's great! I knew I liked her!" James looks at Dayna, prompting her to go on. "What did she mean by that?"

"That's exactly what I asked her!"

"And what did she say?"

"She didn't say. She wrote. On a sticky note! I'll tell you her words exactly—I'm not kidding—this is what she wrote." Dayna pauses, "'I love a good story.'" She leans back in her chair. "That's what she said: 'I love a good story.' That's it!"

James puts both hands on the table. "Brilliant! That's some good drama right there. How did she give you the note? Did she slide it over to you? Did she slap it on the desk?"

Dayna can see her actor friend imagining a staged production of compliance-on-Broadway. She isn't having it and tries to bring him back to reality. "Isn't that crazy?" she asks, looking for a little bit of empathy.

"You know, I think she's on to something," says James.

"Come on!" says Dayna, "You're siding with the compliance director?"

"Listen, I tell stories all the time when I'm facilitating training."

"Yeah, but that's with sales people in a classroom! We're talking about e-learning for thousands of employees. The entire company. And it's compliance training!"

"So?" he challenges her.

"There's a huge difference!"

"How is it different?" He goes on, "I tell success stories. I tell stories about sales people who make missteps. We do role play. You could do something like that in e-learning, right? Maybe not role play, per se, but what about writing some scenarios?"

Dayna didn't like the direction of the conversation, but James made some sense. "OK, maybe I could see where scenarios would be helpful. Maybe."

"Look, it's not that complex," he says. "You have some fictitious employees in some sort of an ethical dilemma. True?"

"OK," Dayna relents. "You're the actor. Any tips?"

"Well, a scenario needs characters, right?" Dayna barely nods. "So, in order to write a relatable character your audience . . . "

Dayna interrupts. "I am not a playwright."

"Not yet." James smiles. "But you've got to know who you're training before you can train them."

"Sure," Dayna concedes.

"When I first started corporate training in sales, I did a lot of research to find out who my audience was."

"Wasn't it pretty obvious? I mean, it was sales people, right?" asks Dayna.

"Yes, but I wanted to know things like what motivated them, and what their fears were, and how far out of their comfort zone I was asking them to go."

"OK." Dayna still isn't sure what this has to do with her story assignment.

"So," James explains, "If I know that the group I'm about to train is motivated by recognition, I'm going to give them a lot of it in the class. If they're biggest fear is speaking in front of a group, I will limit activities to one-on-one."

"Yeah, I get it," Dayna says. "But what has that got to do with stories?"

"Doesn't it stand to reason that the more you know your audience, the more believable of a character you can create for your story?" Dayna can't argue with that. "Find out who your learners are, so you can create a character they can relate to."

Dayna is getting it but still has objections. "It's a big company. How do I get to know them? Do you mean like demographics?"

"Demographics can help. But what's going on with them? What are their values. What do they do for pleasure? What's happening in the company that affects everybody?"

Dayna shakes her head. "I don't know how to find out all that stuff!"

"I didn't know either when I first started. But I found people who did! I talked with managers in sales, I visited with sales account managers and asked them a lot of questions about my audience."

Dayna is impressed. "You did all of that?"

"Yes, unfortunately none of that work was done by the instructional designer. I had to do it myself. Frankly, I don't do a lot of the activities that are designed for the class because they just don't make sense for my audience. I've come up with my own based on what I know about them."

"Ouch," says Dayna.

"But you are no ordinary instructional designer!" He points at Dayna, smiling. "You are an instructional designer who knows her audience!"

"I guess I could ask my manager if she knows some of the answers to these questions."

"And once you have those answers, you'll be able to create characters!"

"Kind of a tall order, James."

"Dayna . . . " James stops. "Do you have a pen?" Dayna raises her eyebrows. She takes a pen out of her purse and hands it to him. James scribbles on a napkin and slaps the napkin face down on the table in front of Dayna. He grins and walks over to the bar.

Dayna sighs. "Always the actor," she says as she turns the napkin over. There's James's dramatic flourish:

"You are a storyteller."

Dayna has a meeting with Randall tomorrow. She's not feeling quite up to the task of designing a story for training. And as of yet, she doesn't have what she needs to write one. She will need to find out more about who the audience is and what the course will train that audience to do. This will benefit both the design of the instruction and the design of the story.

As she rightly points out, the course will be assigned to the entire company. That's a large audience. She decides to speak with Fayette and some other managers to create an audience profile of the company. She will use this company audience profile later to create individual characters that they can relate to.

Audience Data

If developing an audience profile is already part of your instructional design process, good! If not, it will be soon.

Not surprisingly, the information you collect about your audience to design good instruction for them is nearly the same information you will need to create relatable characters. Pick a selection of questions below from each category to develop a profile that will help you make the best design decisions for instruction and for relatable characters. Dayna uses these categories of questions to build a profile of her own audience:

- personal information
- what they already know
- values and motivation
- circumstances at work and reactions to circumstances at work
- fears, risk, comfort zone, and commitment

- benefits
- technology and logistics.

At the end of each category, note the information Dayna has collected about her own audience. Remember, her audience, as far as she knows right now, is the entire company. In the next chapter, she will learn more about her audience during her conversation with the subject matter expert, Randall.

Personal Information

The answers to personal questions will inform language, writing style, visual style, audio choices, references to popular culture, level of education, and company position. Look for character backstories and ideas for the type of story this audience would appreciate.

Here are some example personal information questions:

- What is their primary language?
- What is their education or background?
- What is their job or role?
- How long have they been with the company?
- What industry is the company in?
- How long have they been in this field of work?
- Where does the learner live?
- Are they remote employees? In office?
- What types of music do they listen to?
- What types of games do they like to play?
- What types of movies do they like to see?
- What type of humor do they appreciate?
- What types of sports do they like?
- What forms of entertainment do they enjoy?
- What are the demographics of the company?

Dayna's audience profile: Headquarters is in a thriving mid-sized city with a few regional locations across the country and about 90 employees who work remotely. The four main departments are engineering, IT, customer service, and sales. High school football is a big deal in the headquarters location. They also have a local minor league baseball team. The company offers discounted tickets to those games and many employees go with their families. Seventy percent of the employee population is male.

What They Already Know

What is the learner's pre-existing knowledge of the material being presented? The answer to this one question will give you a solid place to begin designing instruction—see the design continuum in Figure 3-1. The less learners know about the performance, the further down on the continuum you can begin to design. For instance, if Dayna's audience doesn't know what a phishing email is, she should start with a definition. But she can't stay in definition-land forever or her learners will go to sleep. She needs to provide activities that will increase their proficiency, moving up the continuum until finally, they are able to put the new knowledge into practice.

Though the design continuum is helpful, don't think of the learners' experience in the course quite so linearly. Starting with a story puts the audience in the situation and opens opportunities for them to practice up front and discover definitions, descriptions, and examples along the way. In a sense, you are throwing them into the deep end of the pool to teach them to swim and tossing in the necessary life preservers along the way.

Figure 3-1. Design Continuum

DESIGN CONTINUUM	
Practice	Today, you're going to encrypt an email.
Demonstration	I'm going to show you how to encrypt an email.
Examples	Here are a few examples of emails that have been encrypted correctly.
Description	Encryption is like a secret code that can't be deciphered by hackers.
Definition	Email encryption: "Encryption of messages to protect the content from being read by entities other than the intended recipients."

Design Continuum, Using Email Encryption As an Example

Stories cover a large part of the design continuum, making storytelling an appealing design choice for instruction. Notice that although stories can include definitions and descriptions of performances, where they really shine is in examples and demonstrations. Add in some realistic choices along the way and put decisions in the learners' court and you've reached all the way up to practice!

Dayna's audience profile: Dayna doesn't have the time or resources to do a formal learner analysis, but she does a high-level assessment of what the entire company has been trained on before. Employees have had training on phishing and privacy, but the courses are essentially the policy on PowerPoint slides with no examples of phishing emails or practice encrypting emails successfully. The policies do not tell employees what to do if they do click on a link or open an attachment containing malware or how to handle the situation if they've sent an unencrypted email.

Values and Motivation

Identifying values and motivation clearly falls into the category of attitude. Content should make the connection between the performance and the company's values, and appeal to employees' personal values. Look for opportunities to set up the training for success with pre-course communications, or course descriptions that are motivating for your audience.

You've already read how stories are like a flight simulator, preparing your audience for action. If your characters value the same things your audience values, you will form a quicker connection between the audience and your characters. Motivation to change will increase.

Here are some example values and motivation questions:

- What do they value most about their job?
- What do they value most in life?
- What motivates them at work?

- What do they do in their spare time?
- What will motivate them to take the training?
- What will motivate them to act on the training?

Dayna's audience profile: In addition to asking managers, Dayna asks co-workers what they value about their work. She puts together a short list of the most common answers: innovation, quality, customer service, hard work, and celebrating accomplishments.

Circumstances at Work and Reactions to Circumstances

Is training part of a larger change management project? Should it be? Are there things in the work environment that could be enhanced or changed to help learning be more successful? Knowing what's actually happening in the workplace will only serve to make your stories more real to life. Answers to these questions may reveal powerful emotions that you can tap into for the story. Integrate these circumstances, like deadlines or production quotas, into the story as external pressures that intensify the conflict.

Here are some example work circumstances questions:

- What are their current circumstances at work? Describe.
- How are they currently reacting to circumstances at work?
- What challenges them most at work?
- Has anything happened recently in the organization that may make them feel vulnerable?
- Who or what has influence over them?
- Who do they have influence over?
- Will this training or message create a shift in power?
- How are they likely to respond to this training in light of their circumstances at work?

Dayna's audience profile: Dayna records some of the current circumstances at her company: A new product release has had a ripple effect of change within the organization, including restructuring two of its divisions. IT has recently outsourced its help desk to a vendor. The transition has been bumpy.

The company has a strong financial standing and rewards its employees well for strong performance.

She also records how employees are reacting to those circumstances: Employees in the affected divisions are adjusting to the new reporting structure well. They are used to organizational changes that facilitate more innovation. However, because of the frequent team changes, effective communication regarding new policies and expectations sometimes suffers. There is general distrust of the vendor who has taken the help desk function. Many employees avoid calling the help desk. Employees are motivated to bring innovative products to the market and rally behind new products.

Fears, Risk, Comfort Zone, and Commitment

High levels of discomfort, noncommitment, perceived risks, and fears pose a challenge for instruction. Learners may not act on what they are being trained for due to any one of these factors. They may need a firmer grasp of the purpose, importance, and benefits of training to ease into the new reality. Use the next category of questions (benefits) to help solve for negative situations in this category.

Fears, risk, comfort zone, and commitment are sources of internal or external conflict that can be demonstrated through story. Most of the time, when these situations exist in the workplace, it's best to include them as part of the story's conflict, either head-on or subtly as secondary sources of conflict. Many times, you will find relevant emotional content in this category.

Here are some example fear, risk, comfort zone, and commitment questions:

- What keeps them up at night?
- What fears will keep them from taking action?
- What other mental or practical barriers will prevent them from taking action?
- Can these fears or other barriers be dispelled? How?
- What might they misunderstand about the message?

- Why might they believe the change doesn't make sense for them or their organization?
- What would they sacrifice if they acted upon the training?
- What is the perceived risk of changing the way they do things?
- What are the physical or emotional risks they will need to take?
- How will this stretch them?
- Who or what might they have to confront as a result of this training?
- What is their tolerance level for change?
- How far out of their comfort zone are you asking them to go?
- Are you asking them to unlearn something? What?
- Are they willing to commit time to take the training?
- Are they willing to commit to acting upon the training?
- What preconceptions do they have regarding the training?

Dayna's audience profile: Dayna asks one question from this category: "What keeps you up at night?" or "What are your work-related fears?" Some managers qualify their answers to this question with preambles like, "Well, I wouldn't say I stay up at night thinking about it . . . " or "I'd call it more *concerned* rather than *feared*." But their answers are exactly what she is looking for. She summarizes their answers like this: They fear that their new product will fail. They are concerned about being sidetracked from their focus on innovation and customer service.

She also finds out that compliance is sometimes perceived as a hinderance to innovation and that employees struggle to complete compliance training on time.

Benefits

Showing learners what's in it for them provides motivation to complete training and act on it. Make the benefit clear, compelling, and personal. You'll learn more about how benefits fit into the instructional design plan in the following chapter.

The fallout of conflict results in consequences, which your stories will clearly demonstrate. But how many times have you heard the phrase, "I learned more from my successes than I did from my mistakes"? Never. Let the characters make mistakes and let learners learn from them. The benefits will be implied.

Here are some example benefits questions:

- How will they personally benefit from the training and taking action? What's in it for them?
- How will training help their sphere of influence?
- How will the company benefit?
- How will clients benefit?

Dayna's audience profile: The answers she receives from managers regarding the benefits of detecting phishing and encrypting emails revolve around the company's reputation and protecting member data. Both of these benefits make sense. The company values customer service, which aligns with why employees may fear a compromise of the customer-company trust. She does not receive responses that shed light upon why employees may personally benefit from the training. She will learn more about what's in it for the employee during her conversation with Randall in the next chapter.

Technology and Logistics

Technology and logistics questions are great for external consultants who need to have a better lay of the land. Technology often defines constraints for you that affect how you develop the training solution. Similarly, the technology available will be a factor in how you deliver the story you create for training. Embrace constraints as opportunities to explore creative ways to deliver the story.

Here are some example technology and logistics questions:

- What is their experience with e-learning? Mobile learning? Gamification? Social media?
- Where will they take the training?
- Describe the environment where they will take this training.

- Will the learner be able to hear or play audio when taking the training?
- What types of mobile devices do they own?

Dayna's audience profile: Dayna's company already uses e-learning extensively. Their learning management system (LMS) is not particularly user-friendly, but employees have no issue accessing courses that have been assigned to them. The LMS does not support mobile. Most employees will take this course in the office on their work computer or connected remotely to the company's system through VDI.

Summarize the Profile

When you are preparing to design training for a new audience, select questions that will paint the most accurate picture of them. You will not use all these questions for each new audience. You can select those questions that you feel will give you the best insights into who your audience is. At the minimum, collect enough information on your audience to describe the following:

- a brief personal description unique to that audience with select demographics
- their pre-existing knowledge of the performance you are training on
- what they value
- their current circumstances at work
- their reactions to current circumstances at work
- their fears and preconceptions of training
- the benefits to the company and to the learner
- their technology options for training delivery.

If you can describe your audience using these eight attributes, you have a good grasp on who they are, what they know, how they feel, and what brings them pain and pleasure. You also know how training should be delivered. All of this is good for both instruction and stories! The Audience Profile Questionnaire is located in appendix 1. Download the editable version at www.needastory.com/book-resources.

Figure 3-2 shows Dayna's final audience profile of the company.

Figure 3-2. Audience Profile for Entire Company

- **Personal information:** Most employees work at headquarters and live in a thriving mid-sized city. Ten percent work in smaller regional locations across the country and about 90 employees work remotely. The four largest departments are engineering, IT, customer service, and sales. High school football is a big deal in the headquarters location. They also have a local minor league baseball team. The company offers discounted tickets to those games, and many employees go with their families. Seventy percent of the employee population is male.
- **Their pre-existing knowledge of the performance you are training on:** Employees have had training on both phishing and privacy, but the courses are essentially the policy on PowerPoint slides with no examples of phishing emails or practice encrypting emails successfully. The policies do not tell employees what to do if they do click on a link or open an attachment containing malware or how to handle the situation if they've sent an unencrypted email.
- **What they value**: Innovation, quality, customer service, hard work, and celebrating accomplishments.
- **Their current circumstances at work**: A new product release has had a ripple effect of change within the organization, including restructuring two of its divisions. IT has recently outsourced its help desk to a vendor. The transition has been bumpy. The company has a strong financial standing and rewards its employees well for strong performance.
- **Their reactions to current circumstances at work**: Employees in the affected divisions are adjusting to the new reporting structure well. They are used to organizational changes that facilitate more innovation. However, because of the frequent team changes, effective communication regarding new policies and expectations sometimes suffers. There is general distrust of the vendor who has taken the help desk function. Many employees avoid calling the help desk. Employees are motivated to bring innovative products to the market and rally behind new products.
- **Their fears and preconceptions of training**: They fear that their new product will fail. They are concerned about being sidetracked from their focus on innovation and customer service. Compliance is sometimes perceived as a hinderance to innovation. Employees struggle to complete compliance training on time.
- **Benefits of training**: Protect the company's reputation as innovative and trustworthy.
- **Their technology options for training delivery**: They use primarily e-learning for corporate-wide training. Employees have no issue accessing courses that have been assigned to them. The LMS does not support mobile. Most employees will take this course in the office on their work computer or connected remotely to the company's system through VDI.

Getting the Answers

You know the questions to ask, but how do you get the answers? There's really only three ways to find out who your audience is: get out and meet them, ask someone who knows them, or Google them! All three are suitable, depending on who your audience is.

Small Targeted Audience

If the group of people to be trained is accessible, go out and spend some time with the team. Observe and take notes of their behaviors. Ask them questions from the audience profile questionnaire. Gather inspiration from their side conversations about what they did over the weekend. If you can't do that, ask these questions of someone who knows the group well.

Large Corporate Audience

Some general demographics will get you started on this audience. Interview several people from across the company and look for commonalities. Ask questions from the circumstances at work category to unearth these commonalities, like shared challenges and reactions to the company's situation.

Untouchable Audience

There are occasions when even those who know your audience either don't know them well enough to answer the questions or simply won't do it. I experienced this when training the members of a company's board of directors. Employees in the legal department were vague in their answers to the questions I asked. Fortunately, the members of this board were accomplished businesspeople who had run successful companies, written books, done public interviews, and had a long list of accomplishments available on the Internet. So, I researched online until I had enough information to create an audience profile that yielded relatable characters.

When you know your audience, creating relatable characters and making plot choices becomes infinitely easier. The time you spend getting to know them on the front end will reap great benefits when it's time to design instruction and write the story.

PRACTICE STORY DESIGN:
Get to Know Your Audience

It's 8:25 AM. You've been in the waiting room for about five minutes. No one is at the front desk yet. Finally, Janine, the new young lady comes down the hall and sits behind the desk. She looks a little bit worried. She doesn't see you. After a minute, you approach the front desk.

"Hi."

Janine is startled. "Oh! I didn't see you in here! I'm sorry. Are you here for an appointment?"

"I'm here to speak with Dr. Kobal."

"Oh." Janine fumbles with some of the papers in front of her.

You ask her, "Is everything OK?"

"Yes, I'm new and . . . " She stops and looks up at you. "I recognize you. You were in here last week taking notes and stuff."

You laugh. "Yes, that's me! I'm helping Dr. Kobal out. You'll probably see me a few more times."

Janine seems to relax a little. "Okay. Sorry, yeah, he's in a staff meeting. He might be a little late. We had somebody . . . well, Carrie quit. I don't feel like I know enough to run the front desk by myself. It's—it's a little overwhelming."

"I'm not in a rush," you say. "It's OK."

"Thanks. I'm not sure who to ask now about how to get stuff done."

"What about Brandi? Isn't she the office manager?" you offer.

Janine shrugs. "Yeah, I guess I could ask her. It's just, we're supposed to make sure people get into the doctor's office as quick as possible. And there's so much paperwork they have to fill out each time they come in that . . . " She shakes her head. "It's hard to keep track of it all. And then, we're supposed to be nice to everybody, but it's hard when you've got so much to do. I'm sorry, this isn't your problem."

After a moment, you ask, "What excited you about getting this job?"

The question takes Janine off guard. You let her think for a minute. "Well, I was looking forward to getting some job experience. I graduated from high school last spring. I'm taking some night classes and working on a degree."

"That's great!" you say. "What are you studying?"

"I'm just getting core classes out of the way at the community college. I'm not sure what I want to major in. Maybe nursing. I've been helping my mom out at home. She's got MS. Sometimes she needs me to get her dressed. I do most of the cooking for her."

You nod. "That's extremely responsible of you to do that for your mom."

Janine smiles.

"Was there anything else that excited you about working here?"

"Well, I thought I'd get to know my co-workers and have kind of a little family here."

You think you know the answer already, but you ask anyway. "Has that happened?"

"Not really. I mean, everybody's nice, but . . . it's not a family."

You hear voices coming down the hall. "Thanks for your honesty, Janine," you say. "Good luck on your studies!"

"Thanks!" Janine swivels around in her chair and begins pulling files out of the drawer behind her.

Brandi, a short, energetic woman enters the waiting room area. "How are you doing, Janine? Everything under control?"

"I'm good," she says, continuing to pull files.

Brandi looks at you. "Hey, I've seen you around, but we haven't met officially. I'm Brandi." You exchange greetings. "Come on back. Dr. Kobal would like to talk with you in the consultation room." You follow her down the hall, past the examination rooms and into the small consultation room. A stark room, except for two chairs, and a table with a computer. But the adjacent wall is dominated by an aquarium. You smile. *"Funny guy,"* you think.

Shortly, Dr. Kobal strides in. "Morning! Enjoying the fish? Sorry I'm late this morning. More turnover problems."

"I heard," you say.

"Thanks for meeting here. My sister is in my office taking care of HR stuff. I hate it when people leave a voicemail over the weekend to let you know they've quit." He gets right to the heart of the matter. "I've been thinking about our last conversation. I think trust is the problem." He looks at you. You nod. "No trust, no business. What do you think?"

"I agree. I think that's part of the problem," you say.

"OK, how do we fix it?"

You take out your notes. "It seems like what you want most for the business is an increase in loyalty, both from your clients and from your staff."

"Yep, I'm with you there!"

You continue, "If loyalty springs from trusting relationships as you mentioned, and I believe it does, then we need to find out where the breakdown of trust lies."

He leans forward in his chair and nods. "Where is trust breaking down?"

"Communication." You hand Dr. Kobal the list of observations.

He reads the list under his breath. "Key information . . . not effectively communicated . . . Gossiping? Really?" He looks up at you. He reads on. "Talking loudly about personal business . . . mm . . . Talking about clients in front of other clients! Are you serious?" He shakes his head. "I guess I've been out of touch. No wonder we're losing so many clients!" He looks back at the list. "Yeah, I guess all of these things are communications-related."

You clarify, "These forms of communication undermine trust."

"Why are they doing this? I mean, this is all commonsense stuff!"

"But if no one corrects them and trains them how to communicate in a way that builds trust, how will they know?" you ask.

"Is it the doctors too?"

"From what I've observed, there's very little guidance from doctors when a patient moves from the examination room to therapy, other than the prescribed exercise regimen." You add, "And they don't seem too open to the therapists asking them questions."

He looks at the fish tank. "Yeah, I can see that."

"Training can help with a lot of this, but there's another problem."

He looks at you. "What?"

"Paperwork."

He groans and leans back in his chair. "You have no idea! Regulations are so hard to keep up with! There's a form for everything!"

"I noticed that a lot of documentation is manual. Have you considered automating some of it?"

"I've never been that good with technology but . . . yeah, I should look into it. What else do I need to do?"

"Have you met with Brandi yet?"

"No, but I'll set up a meeting with her."

"Good, you pass along your wisdom of team-building to Brandi and look into automating some of the paperwork. I'll work on a plan for training the staff how to communicate with one another in a way that builds trust among one another and your clients."

He stands. "OK. Let's do this!"

As you stand you ask Dr. Kobal. "By the way, do you know what Janine does when she's not at work?"

He shrugs. "Shop, go to movies, go to the gym, like the other staffers?"

You smile. "You should ask her. You've got a real gem there."

Based on your observations and the conversation with Dr. Kobal, adjust the root problem, business outcome, and recommended training from the last chapter, if necessary. Then, write a goal for training using the format below.

Eliminate root problem	To achieve the business outcome	By implementing training on . . . .

Now, create an audience profile based on what you know about the staff at Well Adjusted Chiropractic, using the following eight categories as a guide. Once you've completed the exercise, you can compare your answers to those on the completed Instructional Story Design Plan in appendix 3.

A brief personal description unique to that audience with select demographics

Their pre-existing knowledge of the performance you are training on

What they value

Their current circumstances at work

Their reactions to current circumstances at work

Their fears and preconceptions of training

The benefits to the company and to the learner

Their technology options for training delivery (keep in mind their access to computers)

CHAPTER FOUR

Analyze What You Want the Audience to Do

A Talk With Randall

The next day, Dayna goes to Susan's office for her meeting with Randall, the subject matter expert for compliance training. Dayna has brought a task list of performance objectives that she wants to verify with Randall. She also feels that there are some missing steps that the policy doesn't address.

Susan escorts Dayna to a nearby cubicle. She waves at Randall. Randall takes off his earphones and raises his eyebrows. "Randall, I'd like for you to meet Dayna. She's from learning and development." Randall nods at Dayna. Dayna smiles. "Randall is in touch with the owners of all of the policies we're training on, so he's your point person."

"Thanks, Susan," says Dayna. Susan walks back to her office. Dayna turns to Randall. "Mind if I sit?"

"Nope." Randall removes a stack of papers from the chair by his cubicle.

"Well, as Susan said, I'm the instructional designer for the compliance course." Randall nods again. "I'd like to take a look at the performance objectives with you and see if we can identify gaps." Randall looks at her but says nothing. Dayna tries again. "Susan mentioned some new privacy procedures? Maybe we can start there?"

"Sure," says Randall.

"Um, maybe you could describe the new process of encrypting email," suggests Dayna.

Randall inhales and glances at his screen. "Yep. When you send an email containing sensitive information, you need to *encrypt* it."

Dayna waits for more information. Randall's done. "Alright, what performance expectations do you . . . " Dayna rephrases the question. "What are the steps for encrypting an email?"

Randall demonstrates on his computer how to encrypt the email while Dayna takes notes. "That seems fairly simple," says Dayna. "Type the word encrypt in the subject line of the email and send it." Randall shrugs and nods. "So, why do you think employees aren't doing it?" asks Dayna.

"They are," says Randall matter-of-factly.

"So . . . why do we need to train them?" asks Dayna. "What's the problem?"

"Attachments," Randall says. "The problem is really the attachments."

"What's wrong with the attachments?" she asks.

"They have confidential information in them," says Randall.

"Right." Dayna still doesn't get it. "But isn't that normal? Isn't that part of what we do as a business?"

"Yeah." Randall takes another deep breath. Dayna makes a mental note not to ask yes-or-no questions going forward. This time Randall offers more information. "But they're hiding rows."

"Rows?" asks Dayna. "So are we talking about a spreadsheet here?" Remembering her mental note about yes-or-no questions, she adds, "What file types are being sent as attachments?"

"Yeah, that's it. Excel spreadsheets. They hide rows that have information that doesn't belong to the person they're sending it to. That's an unauthorized disclosure," explains Randall.

Dayna takes some notes and recaps, "So, the recipient gets access to sensitive information that they are unauthorized to see. Because the sender hid rows?"

"Sometimes a report will bring in more information than what's needed . . . you know, more than the minimum necessary." Randall turns to his computer and scrolls through his email.

Dayna is starting to understand. "OK, so when that happens, the employee is just hiding the rows with the extra information that the recipient shouldn't see. But what they should do instead is . . . "

"Delete the rows," says Randall, still scrolling through his email.

"They should delete the rows," Dayna says aloud as she writes it down. "Because the recipient could unhide the rows in the spreadsheet to view sensitive information they are not authorized to see. And that's what you called more than the minimum necessary?"

"Mm-hm."

"OK, what happens if they don't do that?" asks Dayna.

Randall spins around toward Dayna and sits up in his chair. "Let me tell you. Privacy had this one case where the sensitive information of over 12,000 people was disclosed to an unauthorized party in one email. What a headache! Took us over a month to get all of that settled. If people only knew!"

Dayna leans back, surprised at Randall's sudden animation. "If people only knew . . . ?"

Randall continues, " . . . . how much time it takes for disclosure tracking and reporting and the time crunch! We've got to notify people that their information has been sent to the wrong person within 60 days!"

"Yeah, that sounds like a lot of work for one misstep," Dayna empathizes. "This, uh, disclosure tracking. Is this something the employee is responsible for doing?"

"Maybe," says Randall, suddenly sedate. He turns back to his email.

Dayna kicks herself for asking another yes-or-no question. "What should the employee do if they have done something like this—an unauthorized disclosure?

"They should contact the privacy office, I wouldn't worry about putting all of the disclosure tracking stuff in training, just tell them to call the privacy office and they will take it from there."

"But employees may be responsible for doing some of this disclosure tracking—I mean, what are their responsibilities?"

"First, let their supervisor know, then contact the privacy office. They will give further instructions. And yeah, sometimes the supervisor and the employee have to do some of the grunt work, and believe me, it's not fun."

"Thanks, Randall," says Dayna, "That's really helpful." She jots a note on her audience profile: *WIIFM—Save time!* As she writes, she asks Randall, "If you could tell employees one thing about this issue, what would it be?"

"Use your head! Think before your send an email!"

"Good advice," says Dayna. "OK, so it sounds like what the privacy office is asking them to do is check the spreadsheet for hidden rows, minimum necessary, and accuracy?"

"And the email address!" Randall puts his head in his hand, "You'd think people could remember who needed the information. I can't tell you how many cases we've had where people encrypt everything and quality check the spreadsheet attachment but send it to the wrong person!"

"Wow, yeah." Dayna takes some notes. "Is there any other reason why you think people are doing this?"

"None that I know," says Randall, "Except maybe that they are slammed and just want to get it out the door."

"Who?" asks Dayna.

"Well, 95 percent of the time it's customer service," explains Randall.

Dayna makes another note on her audience profile: *customer service*. "That's interesting." Dayna feels an urge to question further about this piece of information but isn't sure what to ask. "What about the cybersecurity issue? The phishing email?"

Randall nods. "Yeah, it's a problem."

Dayna asks, "Why do you think people are still clicking on links that contain malware?"

Randall shakes his head, "I have no idea. Cybersecurity has sent out the policy, like, a hundred times!"

"Wait," says Dayna. "So have employees ever received training on how to handle phishing emails?"

"Well, basically, it's a PowerPoint with the policy on it and a quiz at the end," he answers.

Dayna vaguely remembers taking that course. It was the text of the policy on the screen with an occasional unrelated stock photo. One of those "can't-click-Next-until-the-narration-is-finished" courses. She pulls out the cybersecurity policy from her stack and holds it out to Randall. "But the policy doesn't have anything in here about what to do with phishing emails. Or how to detect them. How are employees supposed to know what to do if the policy doesn't tell them?"

Randall takes the policy and scans through it. Then he points to the page and says, "See, it's right here."

Dayna looks at where Randall is pointing and reads aloud, "Also, employees should always be vigilant to catch emails that carry malware or phishing attempts." Dayna looks at Randall. She looks back at the page. "That's it? This is all the guidance employees are receiving?"

"It's common sense!" says Randall, a little defensively.

Dayna realizes that she could put minimal effort into making this course engaging and probably make Susan and cybersecurity pretty happy. Anything would be better than the death-by-narrated-text course they are used to. But then she thinks of every employee in the company enduring 30 minutes of nonsense and still leaving the course without knowing what to do. And there's Susan's request for a story. She can't think about that right now. The very least she can do is train employees on what they can act on.

"Maybe it's common sense," says Dayna. "But it's not common knowledge. I think with your help we can make detection and prevention steps a little clearer. Let's review these performance objectives . . . " She doesn't want to use instructional design jargon with Randall. How can she describe it succinctly? Finally she says, "Let's build an action list."

Talk Straight

Though many instructional design certification programs have a deep focus on writing learning objectives, a highly academic approach does not always adequately prepare professionals and students to enter the warp-speed world of business. The theory is solid and mastering it is helpful, but when it comes down to communication with stakeholders, SMEs, and learners, it's best to talk straight: "What actions need to be done to achieve the business outcome?" Dayna caught on to this by the end of her conversation with Randall.

You will find success in speaking the language of your subject matter experts and making it easy for them to speak yours. Calling the task list of performance objectives an action list is one of the ways you can bridge that gap. It keeps you and your subject matter experts focused on what's most important: action! Check appendix 1 for an action list template in the Instructional Story Design Plan. Download an editable version of the action list template and an example of a completed action list at needastory.com/book-resources.

Figure 4-1. Action List Template

Action List Template

Use the reminders at the bottom of the template to structure the action list. Record your final action list in the Instructional Story Design Plan in Appendix 2.

Main action	
Sub-action 1	
Sub-sub action A	
Sub-sub action B	
Sub-sub action C	
Sub-action 2	
Sub-sub action A	
Sub-sub action B	
Sub-sub action C	
Sub-action 3	
Sub-sub action A	
Sub-sub action B	
Sub-sub action C	
Sub-action 4	
Sub-sub action A	
Sub-sub action B	
Sub-sub action C	

Observable Action

Let's work on identifying observable actions. Look at the following example of a training goal and its matching actions. Which ones rise to the top as something the learner would be able to do?

> **Goal of training**: Increase sales numbers by 4 percent by end of Q3 by increasing the business acumen of sales associates to accurately and confidently explain product application to clients' needs.

- Understand why clients need to know how products work.
- Show how the product may meet the client's future need by comparing industry trends to the client's situation.
- Avoid putting off client questions about how products work.
- Use the product sheet to show clients product features that will meet their needs.

- Explain how the client's needs will be met by the product.
- Be aware of product applications.
- Share testimonials of how the product has worked for other clients in similar situations.

If you are struggling with this, think of the above list as actions you should be able to observe someone doing. Now, it should be clearer. You can't watch someone *understand* or *be aware*. Both of these verbs must manifest themselves through an observable action. It doesn't mean that learners don't need to understand why clients need to know how products work, but this new knowledge must be acted upon. Those are the actions that need to be included on the action list. *Be aware of* is a commonly used objective. Awareness is a good thing for marketing and communications and can be coupled with training for a powerful experience, but instructional designers need to press beyond this and get to the actions learners will have to perform. Ask the subject matter expert, "If the sales associate understands and is aware of why clients need to know how a product works, what will they do to demonstrate that?"

This holds true even if you may be tasked with designing *core values* training. It is only logical, if *respect* is a core value, that the main action may be "Respect your co-workers." But it can't stop there. The same principle of observable action applies. If employees respect their co-workers, what will they do to demonstrate it? They may "Communicate with co-workers in a way that values their contributions" or even more specifically, "Stop typing, put away your phone, and give your undivided attention during conversations with co-workers."

There's another item on this list that should also be struck. It's a non-action. Remember James's joke in the last chapter about non-learning objectives? That's exactly what *avoid* is telling us: something they shouldn't do, rather than something they can do. If an action list contains words like *avoid* or *do not* or *refrain from*, there is either a positive action hidden somewhere in the negative, or it belongs in the content as part of the purpose, importance or benefits of the course.

In this case, the nonaction, "Avoid putting off client questions about how products work" could have a positive hidden in it, such as "Explain how the client's needs will be met by the product," but that's already on this list. More likely, it would be more powerful to use this information not as a nonaction on the action list, but as part of the content describing the course's importance, such as, "An important step in making the sale is answering clients' questions regarding the application of the product to their needs. Avoiding this step is a mistake that will most likely end in losing the client." Or, even better, imagine a story about a sales person who puts off questions from the client about how products work. Show the fallout of that action and you won't even need to say anything about the importance. They will experience the importance for themselves through the story.

When you scan your initial action list, first look for ones that should be eliminated. Can I observe someone doing this? Is there a nonaction represented? When removing those items from the action list above, this is what's left:

> **Goal of training**: Increase sales numbers by 4 percent by end of Q3 by increasing the business acumen of sales associates to accurately and confidently explain product application to clients' needs.
>
> - ~~Understand why clients need to know how products work.~~
> - Show how the product may meet the client's future need by comparing industry trends to the client's situation.
> - ~~Avoid putting off client questions about how products work.~~
> - Use the product sheet to show clients product features that will meet their needs.
> - Explain how the client's needs will be met by the product.
> - ~~Be aware of product applications.~~
> - Share testimonials of how the product has worked for other clients in similar situations.

Organized Action

Using the pared down version of the sales action list as an example; there's another step that needs to be taken to shape it into an action list with a logical sequence. Right now, the action list is flat. Nothing is more important than anything else. There is no obvious sequence of steps. To make this a more usable action list, let's put the actions in a logical order.

First, take a look at the goal of training. What is the main action sales people will need to do? It's the last phrase of the goal: "Explain product application to clients' needs." Is this represented in the action list? Yes, it's part of all of the actions. The third action, "Explain how the client's needs will be met by the product," is almost identical to the goal of training, so let's move that to the top as our main action. You may call it a terminal performance objective. Since all of the others are parts of this main action, indent them underneath. Now the list looks like this:

- Explain how the client's needs will be met by the product.
    - Show how the product may meet the client's future need by comparing industry trends to the client's situation.
    - Use the product sheet to show clients product features that will meet their needs.
    - Share testimonials of how the product has worked for other clients in similar situations.

After showing this to the subject matter expert, they might agree that all the steps are represented, but in the wrong order. They want sales associates to first use the product sheet to show clients product features that will meet their needs, and they want to bring in testimonials earlier in the process (because success stories are also powerful). Showing how the product may meet the client's future needs by comparing industry trends to the client's situation is last and optional, if the first two steps haven't worked. You modify the action list:

- Explain how the client's needs will be met by the product, using these three steps:
    - Use the product sheet to show clients product features that will meet their needs.
    - Share testimonials of how the product has worked for other clients in similar situations.
    - Show how the product may meet the client's future need by comparing industry trends to the client's situation (if steps 1 and 2 haven't convinced the client).

Now the action list makes a lot of sense. If sales people do steps 1-3, they will accomplish the main action above it. It's easy to digest at a glance and sales associates will be able to use this process on the job. Look back to the first list. It contained all of the right things, plus some extras, but it wasn't organized in a way that was easy to grasp. Though you will have to ask more questions about the sub-actions for steps 1-3, you have a solid framework for designing the instruction and the story.

You might be wondering, *Don't subject matter experts already know these steps? Shouldn't they be able to just hand you a list of steps?* On rare occasion, subject matter experts will have an organized sequence of actions they expect learners to take, but more often, you will help them discover their own process.

Dayna's Action List

Let's refer back to Dayna's conversation with Randall. Before that conversation, Dayna's action list for the privacy training looked like this (Figure 4-2).

Figure 4-2. Dayna's Pre-SME Action List for Privacy

Mitigate risk! → What should employees do?

Be aware of policies

Increase motivation to act upon policies

    Encrypt email with sensitive info to outside parties (ask for steps)

Even before she goes into the conversation, she's already thinking about how to get past awareness. She wants to identify the actions employees need to take. You read about her conversation regarding the action list for encrypting emails. Before reading on, go back to the conversation and jot down the actions that employees should do for the privacy action list. Did you come up with something that looked like this?

Figure 4-3. Dayna's Post-SME Action List for Privacy

Mitigate risk! → What should employees do?

Be aware of policies

Increase motivation to act upon policies

- Encrypt email with sensitive info to outside parties (ask for steps)
  → Already doing this, but still include in training?
- Don't hide rows in Excel spreadsheets that contain sensitive information
  → New goal for training!

Delete rows that contain more than the minimum necessary

- Define minimum necessary: Share only the amount needed for the job

Contact the privacy office if the employee shares more than needed

- May have to spend time doing disclosure tracking to fix the problem.
  Include disclosure tracking in training? Maybe
- Check attached spreadsheets for accuracy
- Understand the need for quality checking email address of recipients
- Customer service—95% of the time –Who works in CS? They are slammed–why?

Note that Dayna picked up from Randall that the bigger problem was not encryption but hiding rows on spreadsheets instead of deleting them. Most likely, you will walk away from stakeholder conversations with a list that looks similarly unorganized. That's OK. You've got all of the information you need. Now take a stab at organizing this list in a logical sequence. Does anything need to be eliminated or re-written? Cross it out or rewrite it. Can you place these actions in a hierarchy that makes sense? In what order should they be listed? Number them in a logical sequence. After you've done these things, come back to see how Dayna organized her list.

Figure 4-4. Dayna's Revised, Organized Action List

Mitigate risk

Main action: Protect the company's confidential information

1. Emails—mainly customer service issue (95% of the time)
2. Share only the minimum necessary in emails
    a. Employees should type the word *encrypt* in the subject line of the email if it contains confidential information
    b. Verify the email address is for the intended recipient
    c. Don't hide rows in attached spreadsheets that contain more than the minimum necessary
    d. Define minimum necessary
3. Understand the importance of reporting unauthorized disclosures of confidential information
    a. Notify your supervisor
    b. Call the privacy office
    c. Disclosure tracking can take a lot of time

Dayna's first pass at organizing the action list is good. This list contains some common red flags, though. Let's refine the action list even more.

Read through Dayna's final action list in Figure 4-6. Are the actions observable? For the most part, yes. Though you couldn't necessarily observe someone verifying an email address outright, the action is written as strong as it can be. Are they organized logically? Notice that everything under number 1 relates to sending email securely and everything under number 2 relates to reporting. And, at a glance, one can easily identify the two main actions that will help mitigate risk concerning privacy: Send emails securely and report unauthorized disclosures.

Action lists help stakeholders confirm their own process and make it easier for them to spot if something is out of place or missing.

Figure 4-5. Action List Red Flags

Action List	Red Flags
Mitigate risk Main action: Protect the company's confidential information 1. ~~Emails—mainly customer service issue (95% of the time)~~	#1 describes the audience—this belongs in the audience profile; delete this one.
2. ~~Share only the minimum necessary in emails~~ **Send emails containing confidential information securely**	#2 is repeated in 2c and 2d; should be more overarching (i.e. an action that includes all the ones below it); delete and replace with "Send emails containing confidential information securely"
a. ~~Employees should~~ type the word encrypt in the subject line of the email if it contains confidential information b. Verify the email address is for the intended recipient	#2a should speak directly to the employee; begin with the word "Type" and this action is good to go.
c. ~~Don't hide~~ **Delete** rows, instead of hiding them, in attached spreadsheets that contain more than the minimum necessary	#2c should be converted to a positive statement; give the learner something to do, like "Delete rows, instead of hiding them."
d. ~~Define minimum necessary~~	#2d is a note for Dayna, not the learner. She can define minimum necessary as part of the content, but this is not something the learner will do. Delete this one.
3. ~~Understand the importance of reporting~~ **Report** unauthorized disclosures of confidential information a. Notify your supervisor b. Call the privacy office	#3 can go deeper than "understand." In fact, this action could start with the word "Report."
c. ~~Disclosure tracking can take a lot of time~~ ***(move to PIBS)***	#3c is not part of this training, but a mention of it could be used as a benefit to the learner. If the learner does a quality check, they prevent using a lot of time on disclosure tracking. Move this one to the PIBS list (see the following sidebar).

Figure 4-6. Dayna's Final Action List

1. Send emails containing confidential information securely
   a. Type the word encrypt in the subject line of the email if it contains confidential information
   b. Verify the email address is for the intended recipient
   c. Delete rows, instead of hiding them, in attached spreadsheets that contain more than the minimum necessary
2. Report unauthorized disclosures of confidential information
   a. Notify your supervisor
   b. Call the Privacy Office

PIBS

As you compile and organize the actions for your action list, items like Dayna's listed below may end up on yours:

- Understand the importance to protect our clients' trust in the company.
- Comply with company policies regarding the protection of our information.
- Reduce time spent on restoring affected systems.

While not observable actions, they are important and should be recorded, but not on the action list. They represent another kind of content that will prove useful, especially for your story. It's called PIBS, which stands for purpose, importance, benefits and similar to:

- **Purpose**: The stakeholder will help define the purpose of the instruction. Usually the purpose statement is woven into the course's description or pre-course communications.
- **Importance**: The importance is derived from the purpose. Think of the purpose as the surface-level "why" (to comply with laws, to build an effective team, or to implement a new system) and the importance as the second-level "why" (because we want to keep our clients, because employees on effective teams are more efficient, because the new system will help streamline our processes). Expressing the importance in the story in instruction helps motivate employees to take action.
- **Benefits**: The results of adopting the new behaviors should have an outcome that positively impacts the company, the team, and the individual. There may be more benefits for her to discover. In the story, since characters are in conflict with the actions from the action list, they will naturally reap consequences that are in conflict with the benefits. Benefits also help with motivation.
- **Similar to**: This is particularly helpful when the content is somewhat foreign to the learner and they need something familiar to explain the unfamiliar. When your story solution is a metaphor, go to your *similar to* for inspiration.

There is a PIBS for each item on the action list, but that can get a little overwhelming. PIBS for Dayna's cybersecurity and privacy course may look similar to this:

- **Purpose**: To comply with company policies regarding the protection of our clients' information.
- **Importance**: Because we want our clients to keep trusting us with their information and do business with us.
- **Benefits**: Our company's brand reputation increases and reduce time spent on restoring affected systems. Individuals benefit from encrypting emails successfully by saving them time on the back end, when they might have to spend hours assisting with disclosure tracking.
- **Similar to**: The trust you place in a credit card company to guard your information.

Training and Stories Are All About Action

Dayna has extracted, from her conversation with Randall, the things that employees should be able to do. She's placed them in a logical order. She will need to go back to Randall to confirm with him that the action list is accurate and complete and that there is nothing extraneous on it.

The action list is essential for instruction and for storytelling. Learner actions must align with the business outcome, which is why they must be observable. Could you take a video of someone doing it? Great! You've got an observable action that you can teach.

This is also important for storytelling, because stories are all about observable action. Earlier in the book, you were asked to imagine your training story as a staged play. Go through your action list and imagine yourself as a director telling the actor to do the things on that list. "Bonnie, I'd like you to cross stage left and be aware of product applications." Sounds ridiculous, right? But if you told Bonnie to cross stage left and use the product sheet to show the client product features that will meet their needs, she can actually do something. There's even a prop she can use to do it!

Characters do things, and in Story Design, they are doing things that conflict with the action list. Get the action list right and the conflict of your story will be spot on.

The End of Analysis

You leave the Discover phase with two things in hand: an audience profile and an action list. Along the way, you've made note of case studies and other possible stories. You've also got a handle on the training's purpose, importance, benefits, and similarities (PIBS). Now it's time to turn to the Design phase. We'll leave instructional design for now and focus exclusively on designing the story, but we'll come back to it in the Deliver phase of the book, where we'll explore the application of storytelling to training delivery.

PRACTICE STORY DESIGN:
Structure an Action List

You gather all of the notes from your conversations with Dr. Kobal and his staff and make a list of the actions that will need to be taken in order for Well Adjusted Chiropractic to retain its customers and staff members.

All of these actions funnel up to the main objective of building strong client loyalty. You've divided your list into three main categories that focus on communication as a foundation of trust building: manager-to-staff communication, staff-to-client communication, and staff-to-staff communication. Dr. Kobal is coaching Carrie on how to communicate with the staff more effectively. For the most part, the staff is cordial to clients when speaking to them directly. You decide to focus training on the last category: staff-to-staff communication.

First, narrow this list down to observable actions. You may need to convert some of them into strong positive actions. Then organize them in a logical sequence. It may not be chronological, but put them in an order that makes sense. Try to narrow the actions down to one main action and four sub-actions that are written as statements directly to the learner. After you've completed the exercise, you can compare your answers to the completed Instructional Story Design Plan in appendix 3.

- Respect other staff members as you want to be respected in the presence of clients.

- Don't talk about personal issues in front of the client.
- Understand the importance of respectful communication.
- Don't withhold information; let staff members in other areas know about important information concerning clients.
- Be aware of clients in the room when speaking to fellow staff members; keep their personal information private.
- Explain the difference between respectful and disrespectful communication.
- Openly communicate with your fellow-staff members.

Write your revised action list below:

PART II
Design

Create characters, conflict, and action

CHAPTER FIVE

Develop Relatable Characters

First Attempt

Dayna reads through the short paragraph she has typed and retyped a dozen times. She mumbles the words audibly: "This is a story about phishing and how to respond to an email containing attachments or links. An employee of our company received an email from a friend—or at least it appeared to be from a friend. In the email, the friend asked the employee to click on a link in the email that would take them to a webpage containing some great store coupons. The employee is about to click the link when the employee realized that the email might not be from a friend after all. It could be from a scammer. Our policy regarding protection of our company systems states, 'Be aware that emails containing malware pose a threat to our company systems.'"

"OK," Dayna nods, "Not bad. Let's see what Susan thinks about it." She composes an email to the director of compliance and attaches her first—actually her thirteenth—attempt at writing a cybersecurity story for the compliance course.

At the end of the day, she receives a response.

"Dayna, thank you for giving the story a try. It's heading in the right direction. Maybe give the employee a name? Let's talk tomorrow."

"That's it? Nice try? I give up! What does she expect? *War and Peace*?" Dayna says to herself. She grabs a copy of her story and heads out. It's Question Mark Grill night.

"So how's the story coming?" James asks.

"I knew you were going to ask me that." Dayna slumps into the booth seat across from him. "I brought it with me."

"Oh, good. Let me see!" Dayna takes a folded piece of paper out of her tote bag and hands it to James. "My masterpiece," she mutters. She feels intimidated putting her scrap of a story into the hands of someone who acts out stories on the stage almost every weekend. But with a meeting with Susan the next day, she needs some perspective.

James reads it silently. Dayna searched his face for a clue. Does he think it's good? He looks up and asks, "Has the compliance director read this yet?"

Dayna looks away, "Yeah."

"And? What did she say?"

Dayna rolls her eyes. "Basically she said, 'Nice try, don't call us, we'll call you.'"

James chuckles. "No, really, what did she say?"

"She wants to meet tomorrow and talk about it. What do you think about it? The story."

"That's all she said?"

"Pretty much, so what do you think?"

James looks down at the creased paper. "Well, you might start by giving the employee a name."

"That's exactly what Susan said!"

"I thought you said . . . " James starts.

Dayna interrupts, "I was trying to make it like, you know, like a character that could be anybody!"

"Anybody has a name," says James.

"I know that! But, OK, if I give this person a name, it might be too . . . " Dayna isn't sure what she wants to say. "I really don't think I'm cut out for this. I'm not a novelist."

"I doubt the compliance director is expecting the course to win a Pulitzer Prize. Giving the character a name will just make them more real," he suggests.

Dayna knows he's right. "Alright, what do I name her? Mary? Beth? . . . Jamie?"

James swoons. "Would you really name your leading woman after me?"

"If you're not nice to me, I will," she says.

"Oh, come on, Dayna, it's not that bad! It just needs action."

Dayna is a little more defensive than she means to be. "You don't think my story has action? What about when she's about to click the link? That was kind of scary." Dayna looks at James.

James grins. "Yeah, I was on the edge of my seat when the employee realized it was a scammer!" He fakes screams, "No! Not the store coupons trick!"

They both laugh. James tilts his head. "How many women work for your company?"

Dayna is still smiling. "What?"

"Well you keep calling this character a woman. I was curious why."

"Not many, actually."

"Not many women work at your company?"

"I actually know the percentage." She smiles. "I did my homework. Our company is 70 percent men."

"Look at you! So, maybe the character's name should be Eric, instead of Mary . . . or Jamie."

"Eric? No way!" James isn't following. "I knew an Eric once." Dayna pauses. "Nevermind. Eric isn't right."

James smiles, "Alright, what would you name him?"

"I don't know."

"Josh?" he asks.

"No."

"Ricardo?"

"No."

"Archibald?"

"No!"

"Why not?" asks James.

"Too uppity. The guys in this company are straightforward. Analytical, you know?"

"OK, so what's a straightforward analytical name?"

Dayna thinks a minute, then nods. "Steve."

"Steve." James smiles. "Nice! What else about these guys do you know?"

"Well, I did make this audience profile thing, at your suggestion. They value innovation, for sure. They're pretty good at navigating change, 'cause it's happening all the time. The company got this third-party vendor that's handling the help desk, which nobody is thrilled with. People avoid calling the help desk at all costs . . . including me," she interjects. "I'm not sure what this has to do with training, but I also made a note that they like football and baseball . . . "

"That is so impressive, Dayna! Do you know what you're doing?" Dayna shakes her head. "Character analysis!" He throws up his arms. "In reverse! This is exactly what I was talking about. You can use this audience profile to write characters!"

"I can't write characters that look like everybody!"

"But you can write characters that everybody can relate to! Right? Characters aren't look-alikes, they're people we understand. I mean if 70 percent of the company fits your description, then everybody knows someone like that! And maybe there's more characters that reach the rest of your audience!" James was half standing, leaning over the table towards Dayna. "Get it?"

Dayna laughs at her friend. "Yes, I get it."

"So, what kind of character would your audience relate to?" He sits down. "Who is Steve, besides straightforward and analytical?"

Dayna thinks. She really thinks about it. "I'm not sure. I haven't been with the company very long and I don't interact with employees in operational areas that much." She looks at James. "I don't know."

"OK, let's start with this: Is Steve a coupon collector?" asks James.

"Hm?" Dayna doesn't catch what James is getting at.

"Your character, Steve? Would he really be tempted by a link to store coupons?"

"Oh, yeah . . . no. OK, I think I see where you're going."

"What does your audience profile say about him?" he presses.

Dayna looks up. "Um, I guess something about engineering might be better?" Dayna is prepared to talk more, but James is looking past her. He's thinking. Of something, probably devious. Then he looks at Dayna.

"I'm teaching an acting class at the Boys and Girls Club this Saturday at two. Can you come?"

That's the last thing Dayna expects James to say. "What? What's that got to do . . . "

"Tell me you'll come!" James interrupts.

"OK, sure," Dayna stumbles, "But . . . "

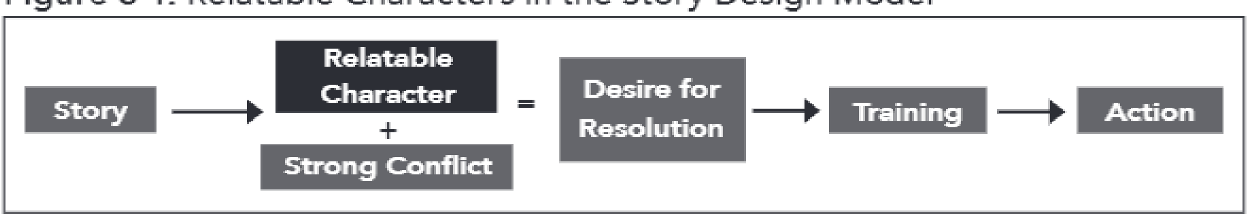
"Great! You work on Steve and I'll see you Saturday!" James gets up.

Dayna has to smile at her friend's dramatic departure. Never a dull moment. Her mind drifts back to her pending meeting with Susan the next day. What is she going to say?

Jumping-Off Point

Coming out of the Discover phase you will have a long list of actions that need to be trained. If you feel like Dayna, staring at your analysis wondering how to make a story out of it, you are not alone. But by now, you know that you are not starting with an empty stage. The Discover chapters helped you identify your audience and what you need them to do. This is your jumping off point. Let's take that information and translate it into the two essential story elements: relatable characters in strong conflict. In this chapter, we begin with relatable characters (Figure 5-1).

Figure 5-1. Relatable Characters in the Story Design Model



Start With Discovery

No matter what size audience, you have to choose the characters in your story based on the audience profile. There are some guideposts in designing characters for your story that will help keep you on track. Dayna has already started creating a character—Steve—for the cybersecurity story. At this point, though, Steve is just a name. Dayna uses the audience profile of the company to create an individual character that employees can relate to (Figure 5-2).

Figure 5-2. Dayna's Audience Profile and Action List for Cybersecurity

Company Audience Profile

- **Personal information**: Most employees work at headquarters and live in a thriving mid-sized city. Ten percent work in smaller regional locations across the country and a about 90 employees work remotely. The four main departments are engineering, IT, customer service, and sales. Engineers and sales staff stay with the company for decades. IT and customer service have a decent turnover rate. High school football is a big deal in the headquarters location. They also have a local minor league baseball team. The company offers discounted tickets to those games and many employees go with their families. Seventy percent of the employee population is male.
- **Their pre-existing knowledge of the performance they are training on**: Employees have had training on both phishing and privacy, but the courses are essentially the policy on PowerPoint slides with no examples of phishing emails or practice encrypting emails successfully. The policies do not tell employees what to do if they do click on a link or open an attachment containing malware or how to handle the situation if they've sent an unencrypted email.
- **What they value**: Innovation, quality, customer service, hard work, and celebrating accomplishments.
- **Their current circumstances at work**: A new product release has had a ripple effect of change within the organization, including restructuring two of its divisions. IT has recently outsourced its Help Desk to a vendor. The transition has been bumpy. The company has a strong financial standing and rewards its employees well for strong performance.
- **Their reactions to current circumstances at work**: Employees in the affected divisions are adjusting to the new reporting structure well. They are used to organizational changes that facilitate more innovation. However, because of the frequent team changes, effective communication regarding new policies and expectations sometimes suffers. There is general distrust of the vendor who has taken the help desk function. Many employees avoid calling the help desk. Employees are motivated to bring innovative products to the market and rally behind new products.
- **Their fears and preconceptions of training**: They fear that their new product will fail. They are concerned about being sidetracked from their focus on innovation and customer service. Compliance is sometimes perceived as a hinderance to innovation and employees struggle to complete compliance training on time.
- **Benefits of training**: Protect the company's reputation as innovative and trustworthy. Unhindered use of tools to do job as employees prevent viruses.
- **Their technology options for training delivery**: They use primarily e-learning for corporate-wide training. Employees have no issue accessing courses that have been assigned to them. The LMS does not support mobile. Most employees will take this course in the office on their work computer or connected remotely to the company's system through VDI.

Training Goal for Cybersecurity
Reduce the number of phishing email incidents 90 percent by end of the quarter as employees detect phishing attempts and take appropriate action.

Action List
Main action: Protect the company's information from scammers
1. Scan emails for common phishing clues using the Phishing Clues job aid
2. Report suspected breaches in security
    a. Call cybersecurity office
    b. Notify your supervisor
3. Forward suspicious emails to the help desk without clicking links or opening attachments

Guideposts for Character Descriptions

Your goal is to describe characters your audience can relate to. After reading through Dayna's case study, characters and plot lines may already be formulating in your mind. That's great! Act on those instincts and use the following guideposts to help shape them into characters that best contribute to the goal of training this audience: *Detect phishing attempts and take appropriate action.*

Their Position

Dayna chooses to set the story in her company's office. Since one of the largest departments in the company is engineering, she chooses to make her character an engineer.

Naming the person's position in the story is not always necessary, but it's a good place to begin a character description. If your audience is an enterprise-wide audience, choose a position that many in the company will either occupy themselves or know someone who does.

Their Conflict

This is the most useful of the guideposts. Look back at the action list. The main action is to *Protect the company's information from scammers*. Underneath it are three sub-actions. Imagine the character (the engineer) in conflict with one of those three actions. For instance, Dayna could pair her engineer with action 1:

Scan emails for common phishing clues using the Phishing Clues job aid

Building strong conflict will be addressed in detail in the next chapter, but already you can see how matching up your characters to be in conflict with one (or more) of the actions on your action list helps define who they are.

Take a moment and think about the engineer. He struggles to scan emails for common phishing clues. Write a short list of adjectives or nouns that describe the engineer based on this new information.

Dayna may describe him as:

- busy
- an innovator
- preoccupied
- a workaholic
- impetuous
- a go-getter.

The engineer in this story could be a busy innovator, a preoccupied workaholic, or an impetuous go-getter. You can imagine any of these characters struggling to take time to scan emails for phishing clues. The stories would be very different, but the character of the engineer is in alignment with the action list and, therefore, reinforces the outcome of training.

Dayna chooses to be conservative and make her character a busy innovator, which seems to capture the spirit of the problem. It's not that this audience is intentionally disregarding compliance. They're just busy with other things and scanning emails for phishing clues is not at the top of their minds.

By simply putting the character in conflict with an action on the list, describing the character becomes easier. In her final story about the engineer, Dayna will strive to put him in conflict with all three sub-actions. For now, though, the conflict with action 1 has helped shape the character.

Their Peers

Dayna starts with a simple story that involves only one character, the engineer. In a moment, we'll look at her characters for the privacy story, which will involve two people. In the practice session, you'll also create two characters.

When you have two or more characters, view them as a cast of peers, with contrasting personalities. There may be occasions where two toxic people need to battle it out in your story, but not usually. You want to aim for balance in your stories. Rely on your experience as a daily consumer and teller of stories to guide you toward that right balance and contrast in your cast of characters.

Demographics should also play a role in balance. Depending on your audience profile, you will want to cast characters with the appropriate ratio of women and men, young and old and in-between, and the spectrum of cultural backgrounds. Dayna already has a man in mind for this character, which seems appropriate, given that 70 percent of the company is male.

Their Appearance and Mannerisms

Brief physical descriptions can be helpful, especially if you plan to develop the story using pictures, video, or animation. Dayna describes her engineer as:

- broad-shouldered and tall
- high energy.

Dayna doesn't need much in this category to picture in her mind who the engineer is. Even if these physical attributes don't make it into the story exactly as she initially imagines it, it will help her to connect with the character more concretely as she writes the story.

So far, Dayna can describe her character as:

An engineer, a busy innovator, tall with broad shoulders, high energy.

She's getting there.

Build in More Detail Using the Audience Profile

In chapter 3, you narrowed the audience profile down to eight key pieces of information. Five of these attributes will act as further guideposts to help describe the character:

1. personal information
2. values
3. current circumstances at work

4. reaction to current circumstances at work
5. fears.

Personal Information

The character's personal history with the company may be helpful and relevant to the story's action. Are they a new hire? Have they been with the company for 20 years? Did they leave the organization for a few years and have recently come back? Mentioning a personal outside activity in the story can be a point of connection with your audience, as long as it's related to the conflict of the story.

Dayna looks at the personal information of her audience profile to gain inspiration for her character's description:

- He loves sports, and is a former football player at a local high school.
- He's high energy.
- He's married and has a seven-year-old son.

Knowing that Dayna's character loves sports, has high energy, and is married and has a seven-year-old son may help move the plot forward. For instance, it may help Dayna narrow in on what kind of phishing email would be a temptation. Since he loves sports, perhaps the lure to make him click the link is free tickets to a game or coupons for sports equipment. Including personal information in the character description is not always necessary, but it is helpful when the story involves outside influences.

Values

You don't need to dive deeply into the psyche of your characters, but it's helpful to know how their values affect their behaviors. Behaviors equal action. Dayna looks at the values of her audience and feels that her character's values would likely align with innovation. This is how she describes it:

- values fast innovation
- works hard and plays hard.

Imagine this character coming into contact with a phishing email. He's got email pouring in and a phishing email advertising something he loves