

The Nudge Machine

The Nudge Machine is a behavioral insight platform for coaches and coachees. It provides an instrumentation and measurement framework for behavioral interventions enabling coachees to track progress and coaches to tailor instruction. Using The Nudge Machine, coachees can set and track goals while the coach can reach out and support their coachees whether it be it inside the classroom or in the context of their daily lives. The tool is device independent and can be used on a mobile or desktop browser. It's a virtual coach-in-your-pocket.

Getting Started Guide

A getting started guide aimed at coachees is covered in this documentation. The minimum you need to do to get started is to complete a once-off enrolment process. You can then configure your goals and begin the process of recording and monitoring your goal attainment performance.

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Home Menu

This is the home page which you can reach by entering <http://DOMAIN> in your browser. The value of **DOMAIN** is described below.

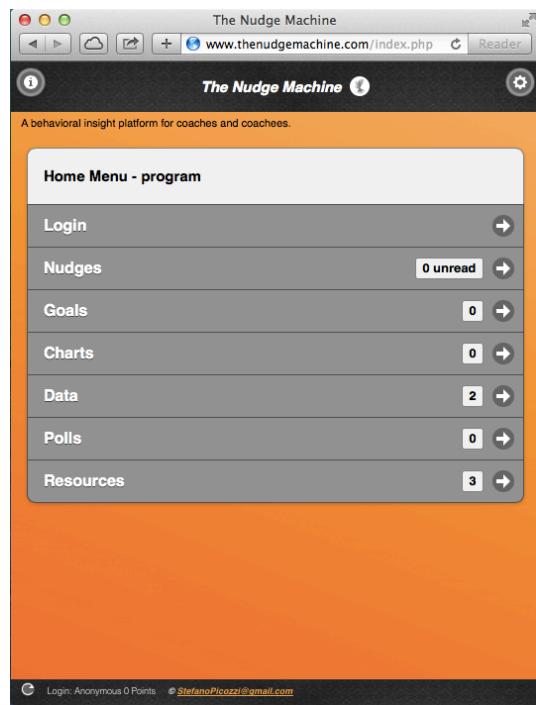
There are three main sections to this application, a Home Menu, a Settings Menu and a Help Menu.

To access the Help Menu click the info icon located at the left of the page header. To access the Settings Menu click the gear icon located at the right of the page header.

DOMAIN can take the values of:
www.thenudgemachine.com or
www.satimetry.com

Students on the POGO-8056 course must use
www.thenudgemachine.com

The www.satimetry.com site is a demonstration site for all other users.



A screenshot of a web browser window titled "The Nudge Machine". The address bar shows "www.thenudgemachine.com/index.php". The page content is titled "Home Menu - program". It lists several items with counts and arrows:

- Login
- Nudges (0 unread)
- Goals (0)
- Charts (0)
- Data (2)
- Polls (0)
- Resources (3)

At the bottom, it says "Login: Anonymous 0 Points" and "StefanoPicozzi@gmail.com".

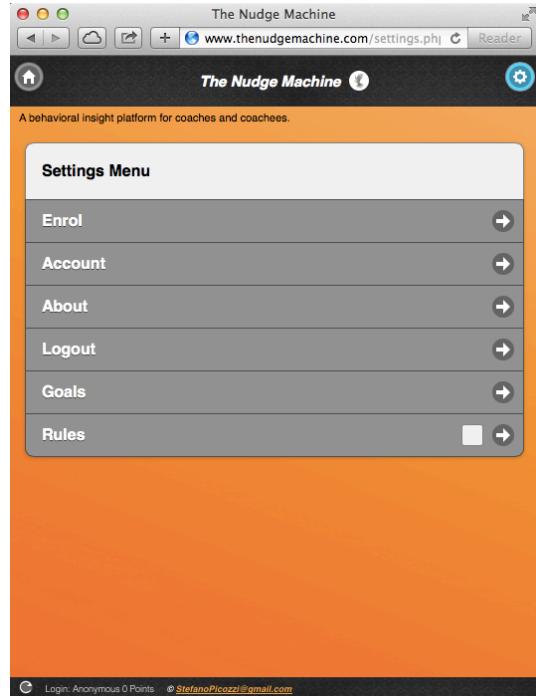
Settings Menu

The Settings Menu is where users can configure the application. An example of this is first-time enrolment and defining goals.

You can reach the Settings Menu by clicking the gear icon on the Home Menu or by entering <http://DOMAIN/settings.php> in your browser.

To use this application you need to first enroll. Select the Enroll option which will take you to the Enrolment Form.

Refer to the Home Menu documentation in this for the value of **DOMAIN**



A screenshot of a web browser window titled "The Nudge Machine". The address bar shows "www.thenudgemachine.com/settings.php". The page content is titled "Settings Menu". It lists several items:

- Enrol
- Account
- About
- Logout
- Goals
- Rules (unchecked)

At the bottom, it says "Login: Anonymous 0 Points" and "StefanoPicozzi@gmail.com".

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Enroll

Complete the Enrolment Form as per the example to the right then click Enroll to save.

Note that this application supports the notion of programs. Programs are a way to organize coachees and their coach into a group. This application is multi-tenanted in the sense that it can support many programs.

For POGO-8056 students the program defaults to as listed on the right.

Visitors using the demonstration system at www.satimetry.com will use the program known as "The Coach in Your Pocket".

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A behavioral insight platform for coaches and coachees.

Enrolment

Username: u1234567

Password: *****

Age: 30

Sex: Male

Program: POGO-8056: People and Performa...

Role: Participant

Enrol

Login: Anonymous 0 Points @ Stefano.Picozzi@gmail.com

Login

To verify that you have successfully enrolled, return to the Home Menu and select Login.

Complete the Login Form as per the example to the right then click Login.

Note again, for POGO-8056 students the program defaults to as listed on the right.

Visitors using the demonstration system at www.satimetry.com will select the program known as "The Coach in Your Pocket".

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A behavioral insight platform for coaches and coachees.

Login

u1234567

POGO-8056: People and Performa...

Login

New user enrolment ...

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Goal Configuration

To configure your goals, navigate to the Settings Menu then select Goals.

Goals follow the Goal Attainment Scale convention and so are organized as a three tier hierarchy for 1) higher order goals, 2) lower order goals and then the 3) goal attainment scale itself.

To begin with, goals use default settings and descriptions which you can customize. To describe your higher order goal click the gear icon to the right of the list entry.

The screenshot shows a web browser window for 'The Nudge Machine'. The address bar shows the URL 'www.thenudgemachine.com/programgo'. The main content area has a dark orange background. At the top, there's a search bar with placeholder text 'Filter items...'. Below it is a section titled 'Higher order goals' containing a single item: 'Higher order goal'. To the right of this item is a small gear icon. The bottom of the screen shows a dark footer bar with the text 'Login: u1234567 0 Points' and an email link 'Stefano.Picozzi@gmail.com'.

Higher Order Goal Configuration

Enter the description for your higher order goal and then click Update to save.

The screenshot shows a web browser window for 'The Nudge Machine'. The address bar shows the URL 'www.thenudgemachine.com/programgo'. The main content area has a dark orange background. On the left, there's a section labeled 'Higher order goal' with a sub-section 'Goal Description:' containing the text 'Become more serene'. Below this are two radio buttons: 'Opt-in' (selected) and 'Opt-out'. In the bottom right corner of the main area is a large blue 'Update' button. The bottom of the screen shows a dark footer bar with the text 'Login: u1234567 0 Points' and an email link 'Stefano.Picozzi@gmail.com'.

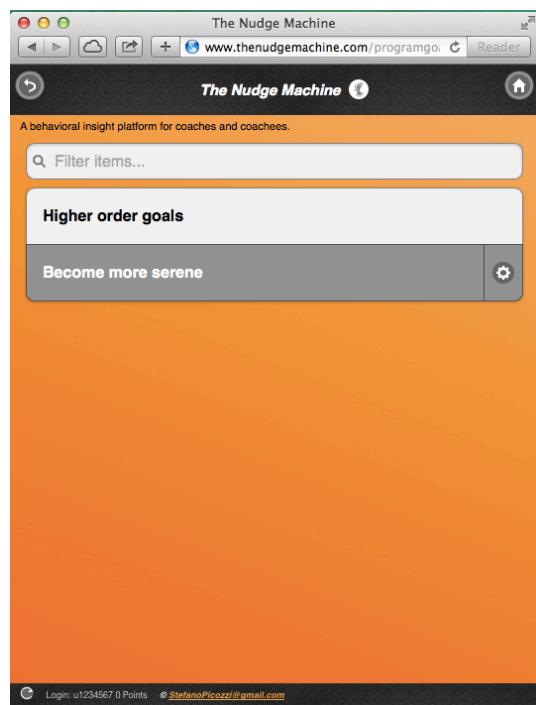
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Lower Order Goal Navigation

You will then be returned to the top level of the goal setting hierarchy and your customized goal will now appear.

To customize the lower order goal drill down to the next level by clicking on the list entry, e.g. somewhere around the text “Become more serene”.

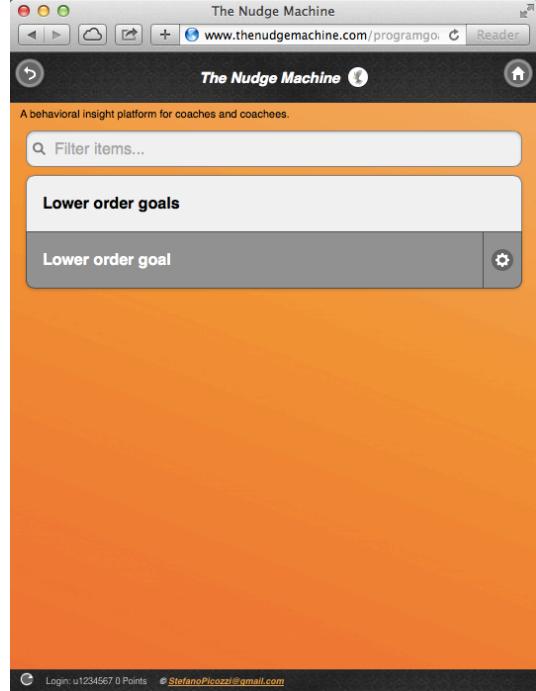


Lower Order Goal Configuration

You are now in the Lower order goals settings page.

As with the Higher order goal, click the gear icon to the right of the list entry to customize your goal.

You will then be presented with a form in which you can update your goal description as you completed earlier for the higher order goal.



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Goal Attainment Scale Navigation

To complete the goal attainment scale level, navigate down to the Lower order goal.

You can then reach the goal attainment scale level clicking on the list entry, e.g. somewhere around the text "Do more mediation practice".

A screenshot of a web browser window titled 'The Nudge Machine'. The URL is www.thenudgemachine.com/programgo. The page content includes a search bar with 'Filter items...', a section titled 'Lower order goals', and a list item 'Do more meditation practice' with a gear icon next to it. The background is orange. At the bottom, there is a login message 'Login: u1234567 0 Points' and an email address 'Stefano.Picozzi@gmail.com'.

GAS Goal Configuration

You will now be presented with the default entries for each of the five goal attainment scale levels.

A screenshot of a web browser window titled 'The Nudge Machine'. The URL is www.thenudgemachine.com/programgo. The page content includes a search bar with 'Filter items...', a section titled 'Goal attainment scale', and a list of five items: 'Worst expected outcome', 'Less than expected outcome', 'Expected outcome', 'More than expected outcome', and 'Best expected outcome', each with a gear icon next to it. The background is orange. At the bottom, there is a login message 'Login: u1234567 0 Points' and an email address 'Stefano.Picozzi@gmail.com'.

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GAS Configuration Example

Each of the five goals at this level are customized as before, with the addition that you also need to add a low and high threshold for the goal.

Upon pressing Update your changes will be saved and then you will be navigated back to the Higher order goal level.

The screenshot shows a configuration page for a goal. The goal description is "Complete <2 x 20-min guided meditations". The "Worst expected outcome" is set to 1, and the "High Target" is set to 1. The "Low Target" is set to 0. The "Opt-in/out" setting is "Opt-in". A large orange button labeled "Update" is visible at the bottom.

GAS Configuration Cont.

To complete the remaining goals, navigate down and repeat as per the previous example.

The screenshot shows a configuration page for a goal attainment scale. The scale items listed are: "Complete <2 x 20-min guided meditations per week", "Less than expected outcome", "Expected outcome", "More than expected outcome", and "Best expected outcome". Each item has a gear icon to its right.

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GAS Configuration Cont.

Note that in this example, the Low and High thresholds are 2 and 3. The thresholds across your five goal scale should completely cover but not overlap your goal scale.

The screenshot shows the 'The Nudge Machine' web application. At the top, it says 'A behavioral insight platform for coaches and coachees.' Below this, there's a form for setting a goal:

Less than expected outcome	Goal Description:	Complete 2-3 x 20-min guided meditations
High Target:	3	
Low Target:	2	
Opt-in/out:	<input checked="" type="radio"/> Opt-in <input type="radio"/> Opt-out	

At the bottom right of the form is a 'Update' button. The footer of the page shows a login status: 'Login: u1234567 0 Points' and an email address: 'stefano.picozzi@gmail.com'.

GAS Configuration Cont.

Once completed, your lowest goal level will look something like the example to the right.

In this example, goals are measured at the week level, but you may prefer to measure at the day level.

The screenshot shows the 'The Nudge Machine' web application displaying a list of goal attainment scales:

Goal attainment scale	Settings
Complete <2 x 20-min guided meditations per week	
Complete 2-3 x 20-min guided meditations per week	
Complete 4 x 20-min guided meditations per week	
Complete 5-6 x 20-min guided meditations per week	
Complete 20-min guided meditation every day of the ...	

The footer of the page shows a login status: 'Login: u1234567 0 Points' and an email address: 'stefano.picozzi@gmail.com'.

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Goal Entry

Now that your goals have been configured you can self-report goal attainment.

This function is located in the Home Menu, then click Goals.

Your customized Higher and Lower order goals will then be presented.

When you click the r-arrow icon to the right of the list you will be presented with a goal self-report entry form.

The Nudge Machine
A behavioral insight platform for coaches and coachees.
Filter items...
Goals
To: Become more serene
By: Do more meditation practice
Login: u1234567 0 Points | [Stefano.Picozzi@gmail.com](#)

Goal Entry Form

Complete the goal Form to record your attainment for the time period of interest.

Note that the page includes a Last updated: field which will display the last entry recorded.

The Nudge Machine
A behavioral insight platform for coaches and coachees.
Become more serene | Do more meditation practice
Last updated: First entry
Date: 2014-02-14
Time: 21:31
Response:
 Complete 20-min guided meditation every day of the week
 Complete 5-6 x 20-min guided meditations per week
 Complete 4 x 20-min guided meditations per week
 Complete 2-3 x 20-min guided meditations per week
 Complete <2 x 20-min guided meditations per week
Submit
Login: u1234567 0 Points | [Stefano.Picozzi@gmail.com](#)

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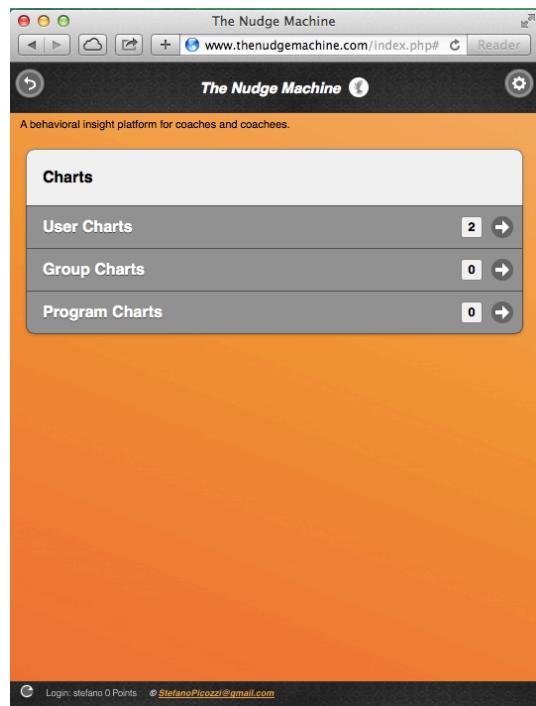


Charts

The application will create and update various charts to visualize your information.

This feature is accessible from the Home Menu then click Charts.

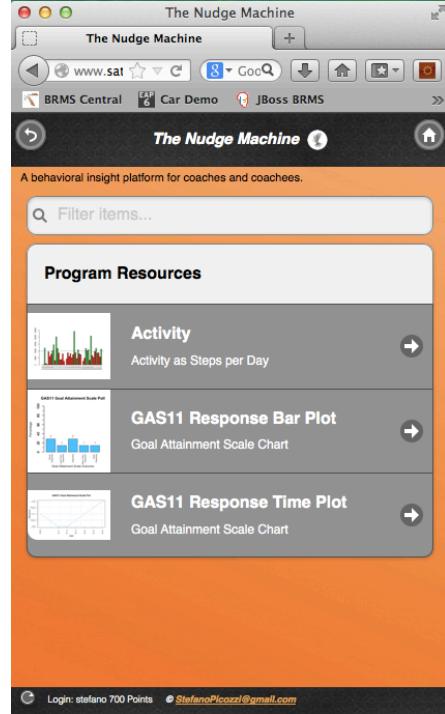
New chart types are added from time to time.



User Charts

Charts related to your goal attainment scale performance are located under User.

From time to time, additional charts may be added to the application. For example, the Activity chart shows steps counted using a fitbit wearable sensor.



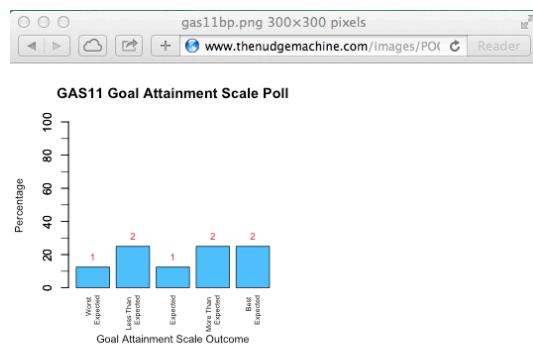
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GAS Charts

To save the chart, just click the chart list entry and the chart of interest will be presented as a full page on your browser.

Use right-mouse-button-down to save.



Polls

The application includes support for polls and surveys. Polls can point to externally hosted surveys or can be internally hosted simple likert scaled polls.

The Poll function is located under the Home upon which you will be presented with a list of available polls.

A screenshot of the Nudge Machine application interface. The top navigation bar displays the title "The Nudge Machine" and the URL "www.satimetry.com/programurl.php". Below the navigation is a search bar with the placeholder "Filter items...". A sidebar on the left contains a "Program Resources" section with a "Sleep - stefano" item, which includes a small icon of a checklist and the URL "pollq.php?pollid=4". The main content area has a solid orange background. At the bottom, there is a footer bar with the text "Login: stefano 700 Points" and the email address "stefano.picozzi@gmail.com".

The Nudge Machine



Poll Entry

Clicking a poll of interest will take you to the poll which you can then complete and submit.

If the poll is externally hosted you need to return to the application using the back button or reentering the application home page URL.

The screenshot shows a web browser window for 'The Nudge Machine' at www.satimetry.com/pollq.php?poll1. The page title is 'The Nudge Machine'. Below it, a sub-header reads 'A behavioral insight platform for coaches and coachees.' The main content area is titled 'sleep Poll (1 of 1)' and includes a timestamp 'Last updated: Tuesday 2:04am 21st January 2014'. A question asks 'Please rate the quality of your sleep in the last 24 hours?' followed by five radio buttons: 'Excellent' (selected), 'Very Good', 'Fair', 'Poor', and 'Very Poor'. A large blue 'Submit' button is at the bottom right. At the very bottom of the page, there's a login message 'Login: stefano 700 Points' and an email link 'StefanoPicozzi@gmail.com'.

Resources

The application includes pointers to content of interest.

This feature is accessible from the Home Menu then click Resources.

The screenshot shows a web browser window for 'The Nudge Machine' at www.thenudgemachine.com/index.php#. The page title is 'The Nudge Machine'. Below it, a sub-header reads 'A behavioral insight platform for coaches and coachees.' The main content area is titled 'Resources' and contains three sections: 'Links' (1 item), 'Tools' (2 items), and 'Extras' (0 items). Each section has a small circular icon with a right-pointing arrow. At the bottom of the page, there's a login message 'Login: u1234567 0 Points' and an email link 'StefanoPicozzi@gmail.com'.

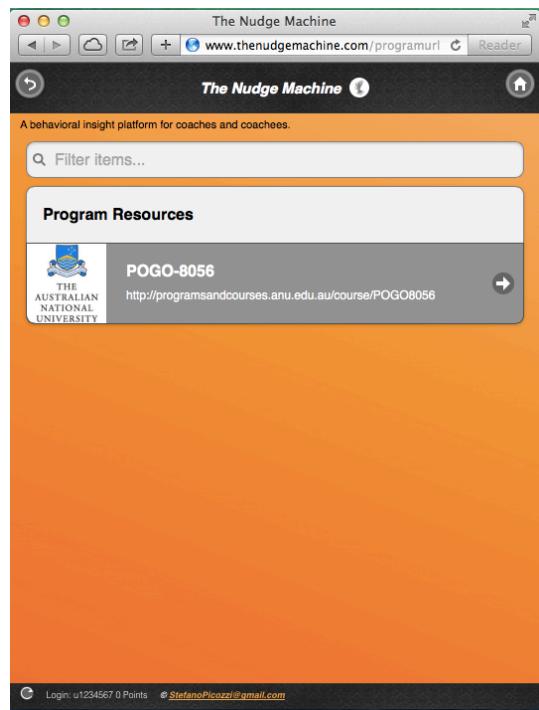
The Nudge Machine



Links

The Links sub-menu is where useful external content pointers are located.

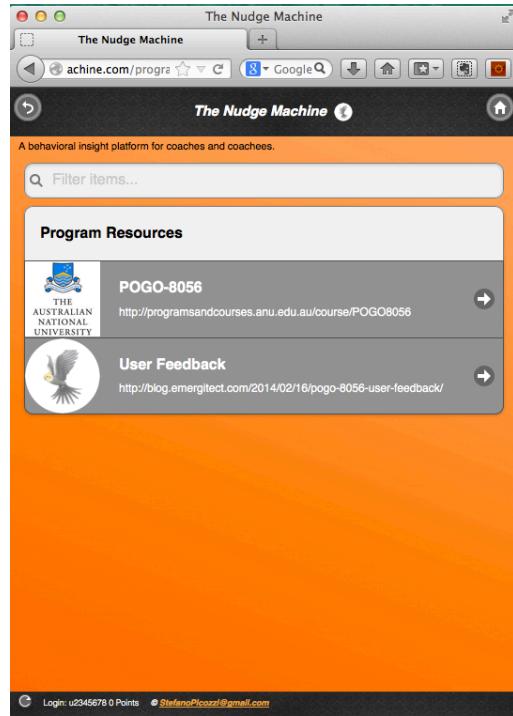
Your coach may update this with new content from time to time.



Support

A support page has been built to support this application. It takes the form of a moderated blog site which is accessible from the Links page under the Resources sub-menu.

When you click the "User Feedback" item you will be directed to a blog page to which you can add comments



The Nudge Machine



Support Cont.

The support page is hosted on wordpress.com as per a screen-short to the right. I will be alerted whenever a new comment appears.

The screenshot shows a WordPress comment section. At the top, it says "POGO-8056 User Feedback | the change architect". Below that, there's a navigation bar with links like "Post navigation", "Previous post", and "Motivation 3.0". The main area displays two comments:

THE CHANGE ARCHITECT. says:
February 16, 2014 at 11:55 am
This is an example comment to get things started.
There is a known navigation issue when configuring the lowest level attainment scale goals and will be fixed in a later release.

U1234567 says:
February 16, 2014 at 12:13 pm
This is a known chart issue. The GAS charts do not show labels on the x-axis. This corrects itself once at least one entry is counted for each of the 5 scales.

At the bottom, there's a "Leave a Reply" button and a "Follow" button.

Tools

The Tools sub-menu is where useful tools are located.

For example, here you will find widgets and instructions for making this application easier to access from your device should you wish to.

The screenshot shows a section titled "Program Resources" under the "Programmable" tool. It lists two items:

- Android App**: A link to the Google Play Store: <https://play.google.com/store/apps/details?id=com.wTheNudgeM...>
- iPhone Bookmark**: A link to Apple Support: <http://support.apple.com/kb/T142>

At the bottom, there's a login message: "Login: u1234567 0 Points" and an email address: "stefano.picozzi@gmail.com".

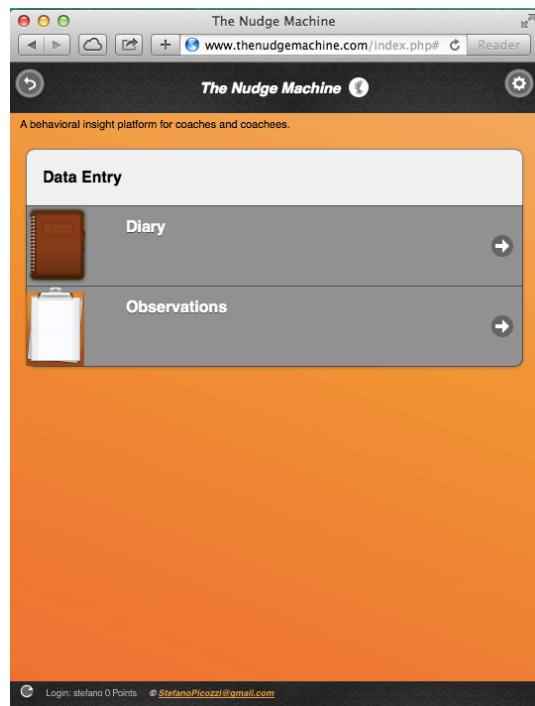
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Data

The application includes a diary and observation entry function.

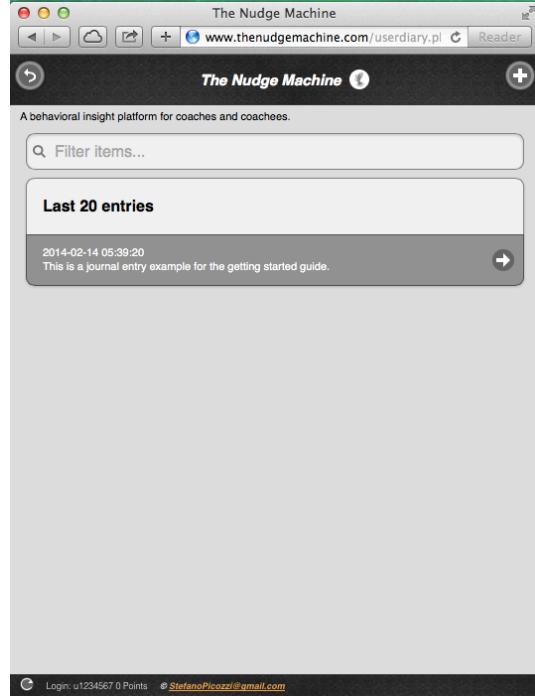
These features are accessible from the Home Menu then click Data.



Diary

The diary function allows you to record journal entries.

To create a new entry click the plus icon.



The Nudge Machine



Diary Entry

Complete the Diary Form as per the example to the right then click Add to save.

This is a journal entry example for the getting started guide.

Cancel Add

Observations

The observation data entry function allows you to record behavioral observations entries.

To create an new entry click the plus icon.

Filter items...

Last 20 observations

Date	Activity	Score
2014-02-14 21:39:00	Attended yoga class	yoga 45

Login: u1234567 0 Points [StefanoPicozzi@gmail.com](#)

The Nudge Machine



Observation Entry

Complete the Observation Form as per the example to the right then click Add to save.

A behavioral insight platform for coaches and coachees.

Observation Entry Type: Minutes of yoga

Description: Attended yoga class

Date: 2014-02-14

Time: 21:39

GPS:

Value: 45

Cancel Add

Login: u1234567 0 Points @stefano.picozzi@gmail.com

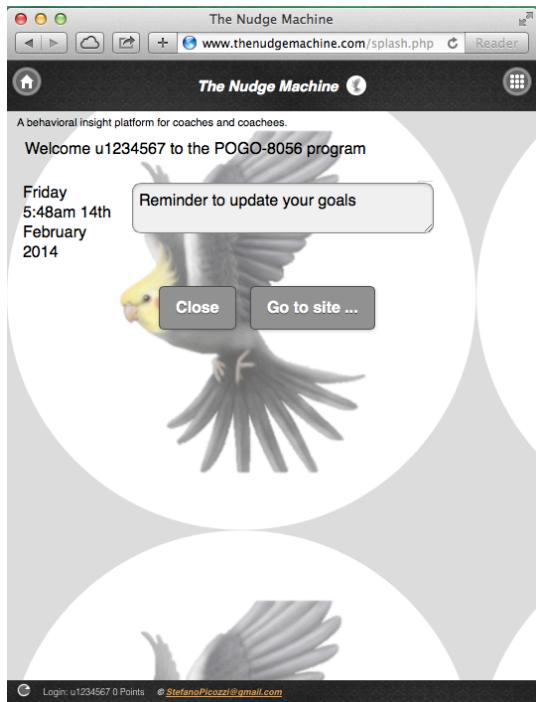
Nudges

The application takes its name from its capacity to enable Coaches to nudge Coachees to make choices more aligned with their goals.

Nudges can take many forms. When you login to the application, a splash screen will appear if you have any unread nudges.

If you have configured pushover.net, nudges will also appear as notifications on your mobile. This is a Wi-Fi based notification app described in more detail in the Help Menu.

Click close to return to the Home Menu. If the nudge is an instruction to self-report a goal, complete a poll or e.g. peruse some content, the Go to site ... button will direct you to the appropriate location.

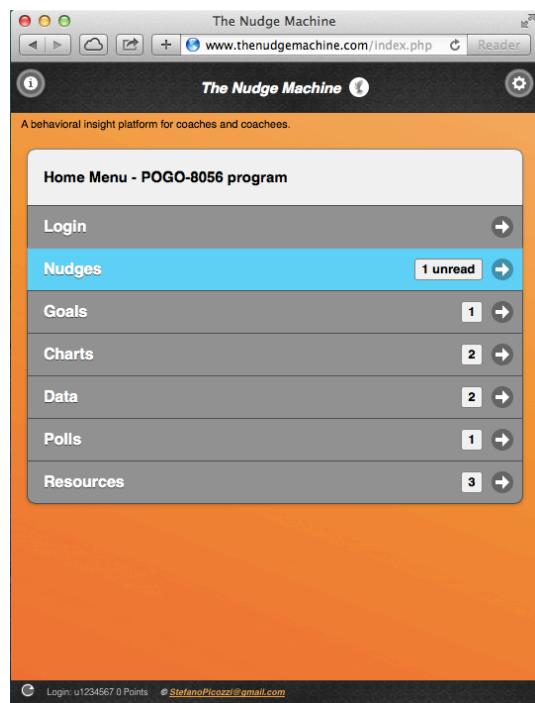


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Nudge Menu

Nudges are also accessible from the Home Menu. Select Nudges to direct you to the list of nudges you have received.



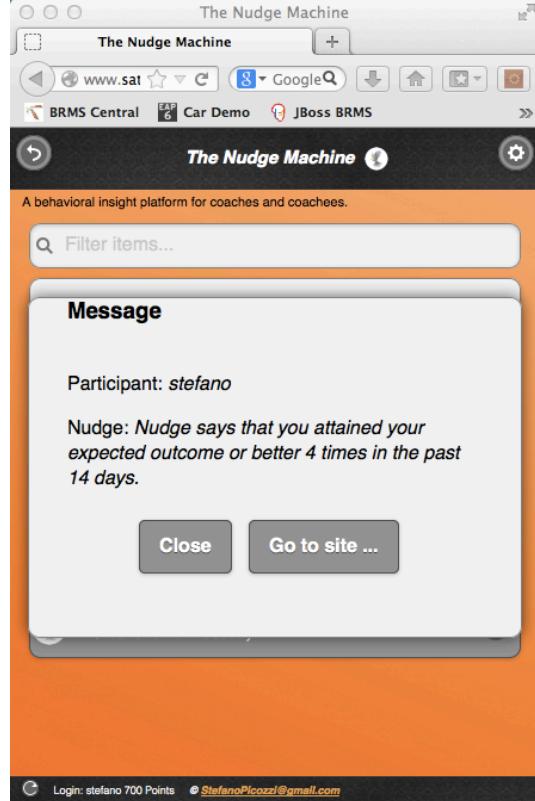
Nudge Menu Items

The Nudge Menu page will display a list of nudges as item. You can click on any item to read the complete nudge text.

As noted, nudges provide a communication channel by which your Coach can interact with Coachees anytime, anywhere including outside formal classroom and instruction hours.

Nudges can be manually generated by the Coach or system generated by the application itself. The nudge comment in the screen-shot to the right shows a system generated example.

System generated nudges are created each day using an automated batch style processing procedure.



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Help Menu

Documentation is located in the Help Menu.

You can reach the Help Menu by clicking the info icon on the Home Menu or by entering <http://DOMAIN/help.php> in your browser.

Refer to the Home Menu documentation in this for the value of **DOMAIN**

A screenshot of a web browser window titled "The Nudge Machine". The URL in the address bar is "www.thenudgemachine.com/help.php". The page content is an orange-themed help menu with a sidebar containing links to "About", "FAQ", "Example", "Demonstration", "Story Board", "Glossary", and "Integration", each with a right-pointing arrow icon. At the bottom left of the page, there is a login status: "Login: u1234567 0 Points" and an email link "StefanoPicozzi@gmail.com".

About

Once in the Help Menu you can navigate around to inspect the various content such as the About page.

A screenshot of a web browser window titled "The Nudge Machine". The URL in the address bar is "www.thenudgemachine.com/help.php#p". The page content is the "About" section of the help menu. It includes a brief introduction: "The Nudge Machine is a behavioral insight platform for coaches and coachees. It provides an instrumentation and measurement framework for behavioral interventions enabling coachees to longitudinally track progress and coaches to tailor instruction. The system integrates both persuasive content to engage coachees with analytic capabilities to inform coaches." Below this is a detailed description of the system's core: "At its core is a rules based event stream engine by which coaches can discover and test behavioral hypotheses. Such insight can then be actioned to nudge coachees toward goal directed desirable behavioral outcomes. The system's behavior is itself controlled via rules permitting coachees to opt out of discrete elements as they wish." Further down, it discusses architecture and gamification: "Its architecture can scale up to large-scale population wide interventions and scale down to programs consisting of just a few participants. The engine can drive interventions of a fixed, scheduled format or those using signal contingent momentary assessments. Instrumentation includes support for an on-board polling mechanism and integration to external survey providers and wearable sensor technologies. The measurement framework can be configured to support gamification strategies." At the bottom, it states: "The Nudge Machine connects coaches and coachees to support their goals both inside the classroom and in the context of their daily lives." A login status at the bottom left shows "Login: u1234567 0 Points" and an email link "StefanoPicozzi@gmail.com".

The Nudge Machine



Frequently Asked Questions

FAQ details for each item can be inspected by clicking the plus icon.

A behavioral insight platform for coaches and coachees.

Filter items...

Frequently Asked Questions

- + How to enrol
- + How to login
- + How to configure goals
- + How to record goals
- + How to verify goal was recorded
- + How to record an observation

Login: u1234567 0 Points | [StefanoPicozzi@gmail.com](#)

Account Settings

The application supports integration with pushover.net for mobile device notification and fitbit for activity monitoring.

Users wishing to make use of such capabilities would need to first download and configure the requisite third party application and then record their individual settings inside this application.

Such advanced settings are available from the Account sub-menu option of the Settings Menu.

Further details for users wishing to integrate pushover.net and fitbit are available in the online help on the Help Menu.

A behavioral insight platform for coaches and coachees.

Account Details

Username: stefano

Password:

Age: 30

Sex: Male

pushover.net user: u8JiTgEDJxz2zzzaK5VM57IDZJsz6

Fitbit key: 9b8a4dffb4684ba5b5fb3b07zzze99a7

Fitbit secret: 27ad03dzzzd8439eb693d1b8430ceca8

Fitbit appname: myfitbitapp

Save Changes

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Pushover

The pushover app runs on iPhone and Android devices. If you choose to use this mobile app, place it on your home page.

New notifications will be indicated by a configurable sound and by a message count marker - in a similar way to SMS.



Notifications

Notifications sent to Pushover can be inspected as per the example to the right. Just click the app and drill down into the messages of interest.



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Rule Settings

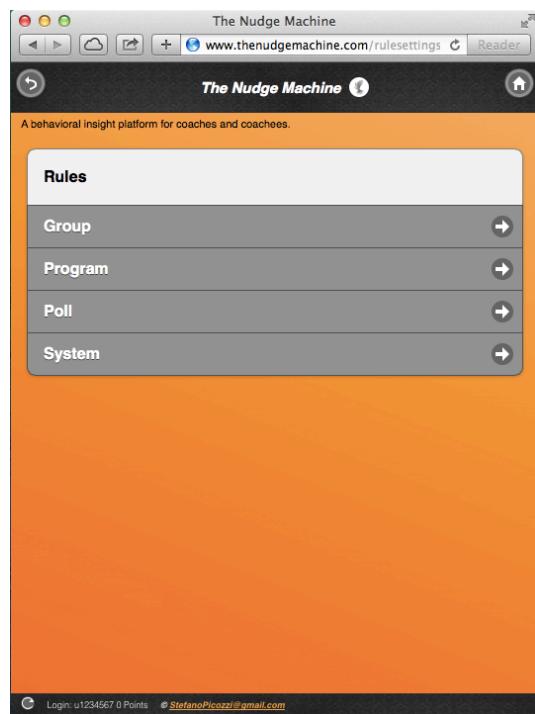
Application features are controlled by rules which are configurable by the user.

This function is located in the Rules sub-menu in the Settings Menu.

For example, the nudging mechanism is enabled or disabled by a program level rule.

For example, if the Coach has implemented a daily nudge that reminds you to complete your goal attainment self-report, you can choose to opt-out of this notification if you wish.

To do this, click the Program sub-menu.



Rule opt-in/out Configuration

A list of program level rules will now appear. To opt-out of e.g. "daily survey reminders", slide the switch to out. To save this change click the gear icon and select Save Changes.

