Teresa Moreno
Learning Experience Designer

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GOALS
THEIRS. YOURS.

Consulting Capsule
SquidFin

connect. the dots. people.
your people.

inspire. actions. others. your-
self.

change. behaviours. the world.
your world.

Business Growth

SquidFin recently got $30 million in funding. Now the goal is to increase the offerings for small businesses. In the next fiscal quarter, approximately 70 new people will join the company in different areas such as data analytics, software engineering, sales, marketing and social media.

New hires need to understand their performance goals and expectations. It is essential that managers hone their leadership skills, develop a shared SquidFin culture to support people, and follow standardized performance goal setting and review guidelines.

Success Statement

Within six months, *managers will fully align* to a standard goal setting and performance review process *contributing effectively* to people's development and SquidFin's growth.

Latisha Williams

Senior Marketing Manager

Age: 38 years old
Region: San Diego, California
Education: MBA in Digital Marketing and Data Management
Tech Savviness: fast learner, active in social media, high skilled at data analysis tools

Pain Points:
Not enough people to get the work done

Goals:
Grow the market for Squidfin by 20% for the next two years
Become CMO in three years

Motivators:
Social relationships and recognition

Inspiration:
Seth Godin, Michelle Obama

Apathy Triggers:
Cheap design and boring copy

Bio
Latisha is a passionate digital marketer and loves being up-to-date. She is always looking for trends and ways to bring SquidFin forward. Latisha tends to focus too much on details and has difficulty letting it go when something doesn't quite fit her own expectations. She cares about people and wants to support her team member in their development.

Blended learning solution

Email marketing

Use humor and storytelling to draw attention to your offer. Make your managers reflect on the subject matter and how your offer will meet their needs. Four weekly emails before the kick-off workshops. Format: short, to the point with a reflective question.

Hybrid workshops

Set the basics of performance goals and reviews in hybrid workshops and gather all managers from different departments to share their experiences, questions and goals in teams. Two hybrid, interactive kick-off workshops. Format: project and discussion-based. Duration: 1 x week, 6 hrs.

Curated resources

Use Slack to share curated compelling stories related to the subject, such as interviews, articles, and podcasts, video talks. Ask the Squid-Fin-relevant questions and prompt the conversation. One managers-only Slack channel. Format: moderated channel with scheduled posts, 1 x weekly.

Learning community

Move your managers from consumers to prosumers in the Slack community. Foster a digital social learning environment where managers can learn from each other.

A managers-centred Slack community. Moderators constantly seek users' feedback and move the community in that direction. Managers have freedom to share resources.

Performance support

Use your Google Drive to store helpful resources and such as templates on how to guide conversations with new hires about performance goals and performance reviews.

Organizational Goals

Scale up the team in the next fiscal quarter to approximately 70 new employees.

Training Goals

Managers will successfully conduct performance conversations with their new hires to create longer-term individualized growth plans.

Learner Goals

Set goals and performance expectations that are transparent, tangible, measurable, culture and people aligned.

Learner Population

Managers from all deparments at SquidFin

Pedagogical Strategies

Curated learning Social learning Structured training (workshops)

Medium

Hybrid workshops Slack community & Google DriveMailing list PDF checklists and job aids Videos, podcasts, and articles

People's feelings about their work are only partly about the work itself.

They are equally, if not more so, about how they frame their work.

And nothing changes frames faster than a story.

— Joseph Grenny, HBR 2017

Scope of Work

Need Analysis

- Preliminary area research
- Discovery call and data gathering about the subject matter and learners
- Kick-off meeting with key stakeholders to set project goals
- Interviews with subject matter experts (SME), managers and employees
- Data analysis and action mapping
- Basic design document

50 - 60 hrs.

Curriculum Development

- Curriculum revision in accordance to input from SMEs (2 rounds)
- Detailed design document
- Content outline for 2 workshops and follow-up Slack modules
- Curate resources (videos, podcasts, articles)
- Learning related activities (e.g., workbook, checklists, reflective writing)

60 - 70 hrs.

Visual Design

- Internal Content Playbook (branding, colours, tone/voice, key words) in Collaboration with Marketing and Internal Communication
- Graphic design and customization

10 hrs.

Content Development

- Workbook and learning activities for 2 workshops and follow-up
- Slack modules. Total: up to 15 lessons (10 hrs. per lesson)
- Templates for Slack posts and prompts
- Revision of resources in accordance to input from SMEs (2 rounds)
- Email marketing content in collaboration with Marketing and Communication (2 rounds)

160 hrs.

Implementation

- Sample testing with beta users
- Upload of resources to Google Drive
- Training of moderators and trainers
- Setup and monitoring of automatic posts publication in Slack (first three months)
- Measurement of learner engagement (with xAPI) in Slack, i.e. messages

20 hrs.

Project Management

- Miscellaneous meetings and project management

30 hrs.

Hours Total: 330 - 350 hrs.
Estimated completion time: 18 weeks

I'm **Teresa**, a learning design strategist.

In my everyday work, I combine the craft of storytelling and learning experience design to empower people to change.

I have ten years of experience in designing and facilitating training in higher education and corporate contexts. As a former language and intercultural trainer, I have a solid communication and learning sciences foundation.

Thanks to my academic background in cultural studies, I can examine behaviours, empathize with people and gain key insights to solve problems. People say I have an exceptional ability to bring ideas to life. I'll be happy to help you.

> Our starting point for the design of any environment designed to **help people learn** must therefore be the individual, and those things **that matter most to them.**
>
> — Nick Shackleton-Jones, How People Learn, 2019

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