LXD Standard Operating Procedures

Process Documentation for the Product Education Team

Introduction

Welcome to Product Education

This document details the processes and tools involved with producing client-facing product education.

Customer Journey

The Marketing Team released new Customer Journey maps in January 2024, segmented by EOS vs. NinetyOS vs. Coached customers. See these maps and a video walkthrough in the Customer Journey folder.

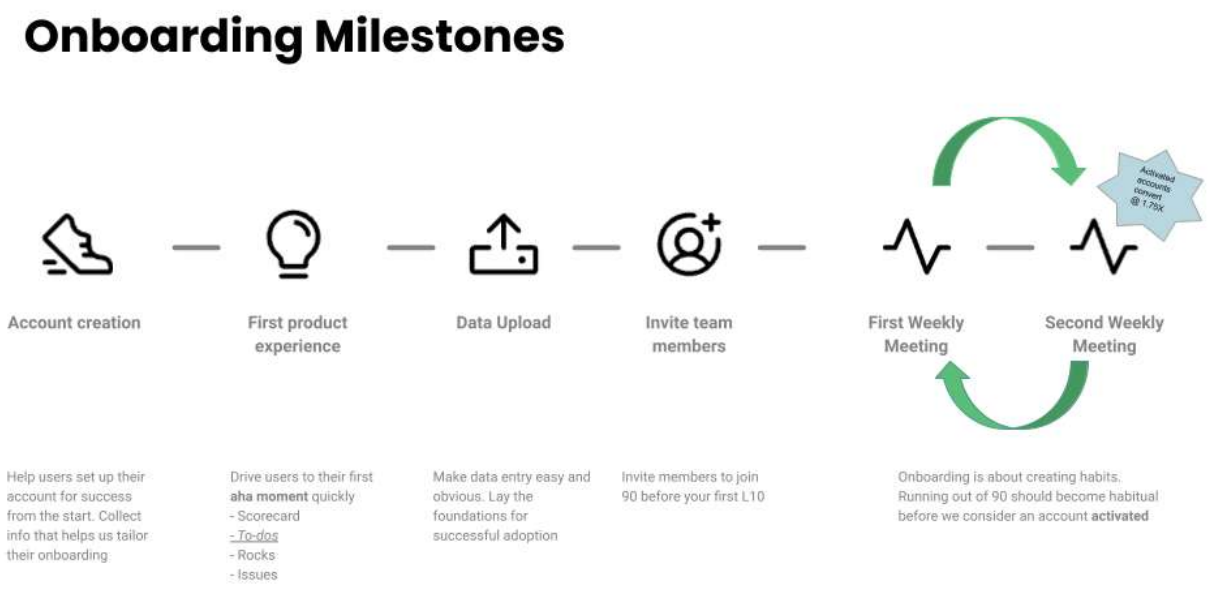
Onboarding (Trial/Activation/Conversion) → Adoption/Expansion → Retention

Within each of these journeys, we'd like to create self-service content that covers the concept, the context, and the how (both in software and in their company). Here's a breakdown of education needs:

Onboarding: Educate the user on how to use our platform, enable them to experience the "aha" moment of value by running or participating in an L10

Adoption: Continue to educate customers on using all of the tools in the app. Encourage habitual usage of the core tools across all paying users.

Expansion: Show customers the value in cascading Ninety to all of their organization. Help them feel confident in bringing on additional teams and users into the platform.



Onboarding vs Existing

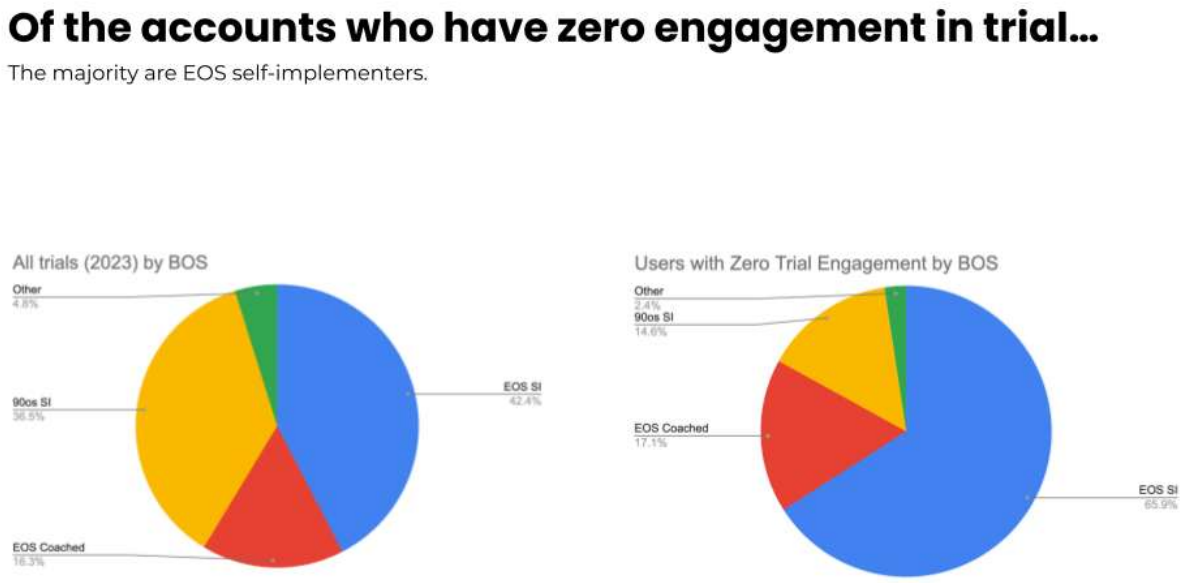
For onboarding clients: we need to prep them for using Ninety tools that have been identified as leading indicators for adoption. Based on our data, the greatest indicator for a trial conversion is when they run 2+ weekly meetings.

For all onboarding clients, we want to:

- Highlight "aha moments" quickly:
    - L10s
    - Measurables or Scorecard
    - Rocks
    - To-Dos, and
    - Issues.
- Teach users the tools while selling the value.
- Serve up timely content when they are using the tool.
- Deliver continual in-app messaging based on user events.

Coached vs Self-Implementers

Coached clients (16% of trial users) are those working with an EOS coach. Self-implementers (79% of trial users) are non-coached clients.



There's another segmentation for self-implementers:

- Strategic Touch: Clients working directly with an Onboarding Specialist (OBS).
- Tech Touch: Clients not engaged with Client Success

Ninety wants to push every client to Strategic Touch, but some clients prefer self-service.

BOS Mature vs. Immature

BOS maturity is another segmentation Ninety uses.

The BOS varies. For trial users, EOS makes up 58%, 90os 37%, and Other 5%.

Leaders vs Team Members

Challenges for leader personas.

Education Team SMaC

A SMaC ("Specific, Methodical, and Consistent") recipe is a set of durable operating practices that creates a replicable, consistent success formula. Read our team SMaC to get an overview of our team's guiding principles. You can find our company-wide SMaC in the Ninety Vision tool.

LxD Data Description

To determine the efficacy of our learning content, we review the following metrics: Please see the Product Education KPI Requests google doc for more information.

These need to be updated and agreed on

Production Metrics for LxD

- 5-6 minutes of LxD content produced per week

Quality Metrics for Onboarding Clients

- Completion rate of videos
    - Do clients watch the entire set of videos?
    - Do they drop off at specific points within each video?
- Successful completion of two Level 10 Meetings
    - Does our data show that the company has successfully completed two L10s? If not, where was the miss?
- Number of client requests for help with each of the call to action activities post video

    - Once these videos are released, are clients still contacting the Client Success team with inquiries related to tools covered in the videos?
- Completion rate of exercises in onboarding prompts
    - Has the client been able to complete the exercises as described in the onboarding?

Quality Metrics for Existing Clients

- Completion rate of videos
    - Do clients watch the entire set of videos?
    - Do they drop off at specific points within each video?
- Number of client requests for help with tools covered in the Help Center
    - Once these videos are released, are clients still contacting the Client Success team with inquiries related to tools covered in the Help Center?
- ___ % Retention of existing Clients
    - When a client does not renew, can we prompt them to tell us why? One of the options- too difficult to understand the tool

Key Stakeholders

To review the entire Ninety organization, go to the Responsibilities tool within Ninety. This list contains who we interact with frequently beyond the Product Education team.

- **Education Team**
    - Head of Education: Spencer Seale
    - Managing Editor: Tiffany Gabbay
    - Publisher: Susan Giles
    - Proofing and Support: Lorraine Delp
- **Partnerships**
    - Head of Partnerships: Kris Snyder
    - Partnerships Relations: Michelle Rose
    - Coach Advocate: Emily Baller

- **Creative**
  - Head of Creative: Kara Skandier
  - Digital Creative Lead: Jeff Jacobs
  - Social Creative Lead: Christina Blo
  - Visual Design Art Director: Dylan Roelke
- **Client Success**
  - Head of Client Success: Christine Watts
  - Support Lead: Taylor Paletta
  - CS Operations: Spencer Williams
- **Product Management**
  - Head of Product: Nick Jeackjuntra
  - Lead Product Designer: Alexander Savchuk
  - Group Product Manager: Cindy Vega
- **Marketing**
  - Head of Marketing: Jono Andrews
  - Product Marketing Lead: Hannah Eflin
  - Lifecycle Marketing Lead: DJ Horton
- **Data**
  - Head of Data: Mark Ziler

Brand Assets

Reference the 90 Brand Assets folder to use the most updated media when creating content. The folder contains logos, animated intro/outro, and approved stock imagery. You can also find brand elements like font, color, and templates in the Team Ninety Canva.

Additionally, for Articulate specific assets, please use this folder found in the PE drive.

Content Style Guide

For guidelines and best practices on how to write for Ninety, including voice and tone, review the Content Style Guide. For your work on product education, you may find these sections particularly helpful:

- Writing about Ninety
- Our Ninety Personality
- Screen Capture Best Practices
- Writing for the Help Center
- Editing Tips
- Creative Brand

Voice and Tone

E-Learnings
Voice Over/ writing

Microlearnings
Voice Over/Writing

Help Center
Writing

Content Selection Process

The Product Education team works collaboratively to determine and prioritize what content is produced. Depending on where the content will be housed, you will either use Articulate and Snagit or Videate to create the content.

Software Overview

- **Articulate**
    - Articulate is a software platform that facilitates the creation of interactive e-learning content and videos. Ninety uses Articulate for creating Micro Learning videos and Interactive Learning modules for new and existing Clients.. For more information on Articulate, please review self-paced courses and resources here.
- **Videate**
    - Videate is an AI production platform that keeps how-to and training videos up to date. Ninety uses Videate for creating short 10- to 30-second videos for the Help Center. These videos are reference points for existing clients and help them receive just-in-time training. For more on Videate, click here.
- **Snagit**
    - Snagit is a screen capture software that the Product Education team uses to create videos for onboarding clients. This software is used in conjunction with Articulate. For more information on how to use Snagit, please view self-paced resources here.
- **Cakewalk**
    - Cakewalk is an audio recording software Ninety uses when capturing audio files for voice over work. To learn more about Cakewalk, visit their website.

Content Types and Hosting Location

Use the Jira Board to review project statuses and accountable Team Members::
https://traxion.atlassian.net/jira/core/projects/PE/board

Help Center vs. Micro Learning Videos

Both can potentially have text boxes.

Unique to Micro Learnings:

1. Intro has:
    a. Title Card
    b. Spoken value add (relevant problem with Ninety as the solution)
    c. Spoken behavior change (i.e., the key steps or learning/performance objectives the video shows them)
    d. Definition of the tool
    e. C and/or D in a text box
2. Content may be more descriptive, and show more detail.
3. Outro has:
    a. Narrative “Now it’s your turn to… “
    b. Video and voiceover clicking the chat icon
    c. Logo animation - Simple 90 logo one

Going forward, start to **call Help Center videos “Nano Learning”** as opposed to Videates (since we’re not using that tool anymore).

Ninety’s Content Strategy

CONTENT STRATEGY

Items in **BLUE** are future initiatives

WHAT CONTENT IS AVAILABLE?

Live Events

Webinars (Intro, Mastering, **Founders Forum**)

Virtual Conferences

Keynote Addresses

Tradeshow Booth Conversations

Videos and Interactives

Podcasts

Interactive Learning

Videate (<30" Video)

Micro Learning (<3' Video)

Video (Brand, **Thought Leadership**, Usage Context)

Static Content

Briefs

Guides

eBooks

Coaches Guides and Toolkits

Assessment and Templates

Blog

Website

Help Center Articles

One-Pagers (Post Training)

Guest Blog

Workbooks

Hard Copy Books

WHERE IS IT CONSUMED?

Email

In-App

Web Pages

KST (LMS)

Newsletters

Help Center

Video (Youtube/Vidyard)

Curriculum for Academia

HOW IS IT PROMOTED?

Email

Social

Partners

Podcasts

Radio

Outdoor

Social Influencers

Content Syndication

Academic Advisors

Recommended by all CS

Internal Learning and Development

CONTENT STRATEGY

Items in blue are future initiatives

What Content is Available?

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Virtual Conferences
Keynote Addresses
Trade Show Booth Conversations

VIDEO & INTERACTIVES

Podcasts, Interactive Learning,
Videate (<30" Video),
Micro Learning (<3' Video)
Video (Brand, Thought Leadership, Usage Context)

STATIC CONTENT

Briefs, Guides, Blogs, eBooks, Website, Guest Blogs, Workbooks, Coaches Guides & Toolkits, Hard Copy Books, Assessments & Templates, One Pagers (Post Training)

Where is it Consumed?

Email
In-App
Web Pages
KST (LMS)
Newsletters
Help Center Articles
Video (YouTube/Vidyard)
Curriculum for Academia

How is it Promoted?

Email
Social
Partners
Podcasts
Radio
Outdoor
Social Influencers
Content Syndication
Academic Advisors
Recommended by all CS
Internal Learning and Development

- **Instructor Led Training Courses/Webinars - https://www.ninety.io/resources**

Live Training and Support: Here clients can register for free classes, webinars, or meet with our Client Success Team 1-on-1.

    - Intro to Ninety's Accountability Tools
    - Implementing Ninety
    - Cascading Ninety
- **Videos - https://www.ninety.io/resources**
    - Micro Learning
        - Onboarding Videos (link to video set)
        - Videate Videos
        - Resource Page Videos
- **Interactive Learning**
    - *In progress*

Static Content

- **Help Center- https://help.ninety.io/en/**
    - Launching Q4: Ninety Help Center: https://ninety.helpjuice.com/
    - EOS Ninety Help Center: https://testcompany-ninety.helpjuice.com/

- **90u Library- https://www.ninety.io/library**

- **90u Glossary- https://www.ninety.io/glossary**

Content Production Process

After collaboratively deciding on content, software to create content, and location where content will be housed, the Learning Experience Designer will begin the scripting process.

Video Type	Template
Micro Learning Video- used to create sets of videos as stand alone content units, examples include Onboarding Videos, Resource Page Videos, and Partnerships.	Micro Learning Template
Nano Learning Video - used for small hits of content, typically embed into existing articles	Videate Template

Managing Projects in Jira

All projects should appear and have status maintained on the Product Education Board in Jira.

Scripting Videos

The following process should be followed when producing new content (without using Videate):

1. Determine the overall objectives, estimated length of time, and platform where content will be housed.
2. Create a first draft to match the outlined requirements.
    a. Scripts should be created in Google Docs using this template.

    b. Use existing articles from the Help Center to guide content and process of script.
3. Draft and have first draft peer reviewed by member of PE team
4. Address feedback and share with SME (dependent on content, may not apply)
5. Address feedback and share the final draft with a proofreader.
6. Address feedback and finalize the script.

Recording Voiceovers

If creating video internally, record all voice-over pieces.

    a. When recording voice-over, break the content into manageable pieces for ease with editing.
    b. Use Cakewalk for recording

TBA

Recording Videos

When creating content, please be sure to record the correct instance of Ninety: Product Ed Instances

- **Ninety Education:** For EOS videos
- **Mastering Ninety:** For NinetyOS videos.
- **Ninety:** DO NOT record anything here. This instance is for your own professional use within Ninety.
- **Dev 1:** This instance features Partner Hub and is to be used when creating content for EOSI Assistants. It houses features that are not yet available (as they are in dev), so be mindful when recording that we don't show features that aren't yet available. (There is a coding trick to accomplish this.)
- **Next:**

Publishing Videos

We host all LXD-created videos on Vidyard in:

Shared Folders >> Education Team >> Micro Learning OR Videate

Upload new videos

1. Click **New** button in the top right.
2. Click **Upload**.
3. Select the video you want to upload.

Replace existing videos

When you update a video, REPLACE the existing one in Vidyard.

To replace an existing video in Vidyard:

1. Go to the folder it's in (either Micro Learning or Videate).
2. Click the video title.
3. From the side panel, click **Settings**.
4. In the top right of the About This Video section, click **Replace**. This maintains the URL so the link doesn't break or need to be updated wherever it's been embedded.
5. **NOTE: Update videos in batches, not piecemeal.**

Supporting Product Launches

- Working with the Product Manager
- Working with SMEs
- Timing/GA
- Project Plan template

Using Videate

Best Practices

- Take the Videate User Certification to explore the full functionality of Videate.

- **DO NOT use transitions**
    - Use case: Switching from one page to another (say going from the Headlines page to a live Meeting to show how teams discuss headlines)
    - Why no transitions? Both current Videate options for transitions (blur and fade to black) aren't on-brand.
    - Instead, separate the script into two videos.
- **Script format:**

Narrative	**Actions**
This is where you will write the voice-over for the Videate videos. Inspiration for the script can be taken from existing Help Center articles on the topic.	This is where you will add the Videate tags. Explore Videate functionality here.

- GIF versus Video:
    - GIFS for 2-4 clicks.
    - Videos for 5 or more.
    - LxDs own GIF creation too.

RACI Chart

Videate videos and GIFs never stand alone. They always support a Help Center article. Therefore, Tech Writers are the accountable stakeholders, collaborating closely with LXDs.

- **Responsible:** LXDs, Tech Writers
- **Accountable:** Tech Writers
- **Consulted:** Subject matter experts as needed
- **Informed:** Entire company in Education Newsletter

Production Process

1. Tech Writers submit the request: Through the Product Education intake form.
   SPECIAL NOTES:
   a. New requests appear as a card in Jira in the backlog category.
   b. Add everyone involved as watchers to the Jira ticket.
   c. For GIFs, expect a 24-48 hour turnaround.
   d. For video, at least five days out. This ensures LXDs have time to draft the script, have it reviewed by an outside party, and make any needed changes.
2. LXDs write the script. The Tech Writer collaborates to ensure the script narration aligns with the article content.
3. Reviews go in this order, with LXDs making updates after each:
   a. Tech Writers review the script draft to ensure content accuracy and article alignment.
   b. Copy Editors review the script for grammar and tone.
   c. Once LXDs produce the video and upload it to Vidyard, another LXD reviews the video.
4. When the video is finalized, LXDs give the iframe embed code to Tech Writers via the Jira ticket created from the request form.
5. Tech Writers embed and integrate the video into the article.
6. LXDs QA medium- to large-sized products on the Jira parent issue. Embedding a one-off video in an article doesn't require a QA.
7. Tech Writers close the Jira ticket.

Using Articulate Storyline

Best Practices

Use the following best practices to help you craft your Articulate video.

Template for Scripting Onboarding Articulate Videos.

- Title page

    - Font type for learning type is Poppins Medium 20
    - Font type for Title is Poppins SemiBold 42



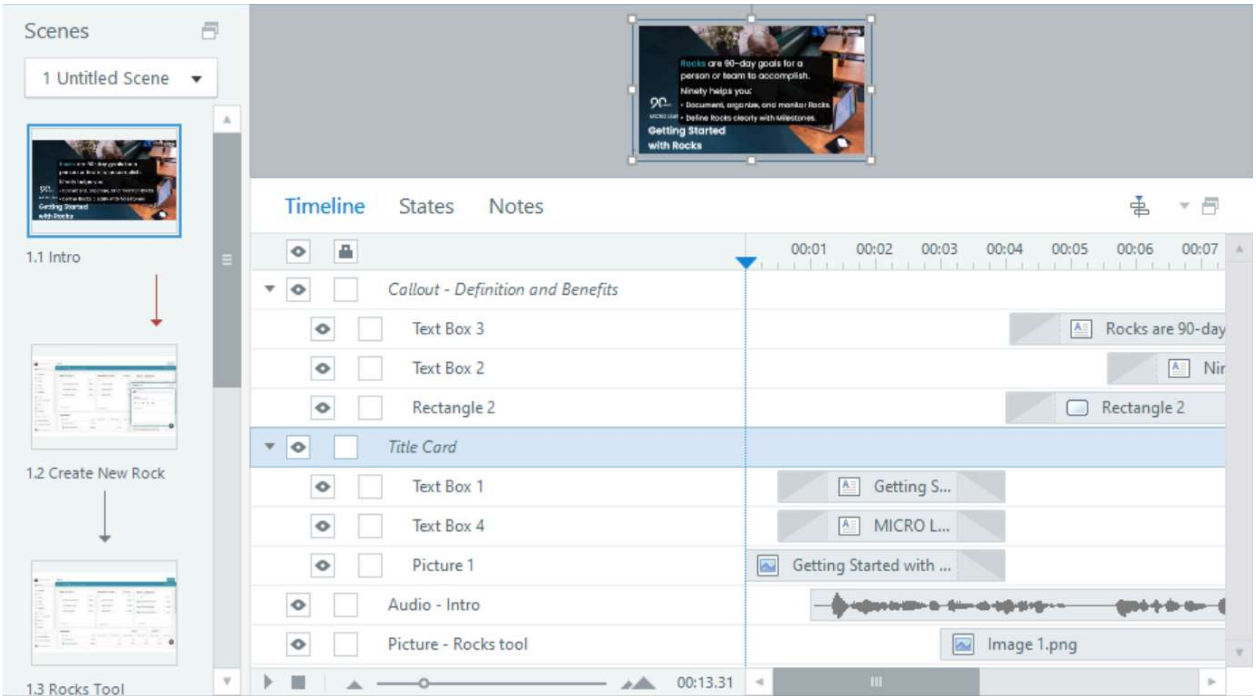
- Zoom the browser window into 125% for screen capture using Snagit.
- For the beginning of a video with a title card, audio should start at the 1.25-second mark while the title page is still on screen.
- Don't fade the screen to white after the title card — fade into the Ninety logo.
- On-screen text font should be white Poppins Medium and left aligned. Use Poppins SemiBold and blue font when highlighting a set of words or for a header. (Specific color names and Hex #s are in the Content Style Guide.)
- When directing the audience to a specific button on the screen, use the target animation GIF (blue target for gray buttons/backgrounds, gray target for blue buttons/backgrounds).
- Try to keep transitions clean between slides (no need for animations going in or out).
- Be mindful of borders when highlighting (make sure the pixels are even).
    - In Articulate, under View, you can enable a grid view for precise alignment.
- The 3-second version of the 90 Logo (outro animation) should be the last asset in your video and does not need the fade animation. Should come up over the last screenshot.
- Thumbnails will be provided by the Creative team.

Video Guidelines

Articulate

- **Narration** - who does the audio, should it vary or be the same person?
    - Whoever builds the initial video, does the VO work.
    - Use a video editing tool (Cakewalk)
    - If less than 40% of narration needs to be updated, then the original VO person will re-record it.
- **Cursor** - Size (add from Storyline Update Process Doc).
    - Size 3 in Windows Accessibility Mouse settings.
- **Monitor** - Record on monitor because of better screen resolution. But colors on 2nd monitor of a laptop might not render colors correctly.
    - Zoom Chrome to 125%.
    - Record on 2nd Monitor, not laptop.
    - Hit F11 so page is full screen.
    - To switch between tabs while in full screen, use keyboard shortcuts:
        - Jump to the next open tab: Ctrl + Tab
        - Jump to the previous open tab: Ctrl + Shift
- ***.story file consistency** - How can we make story files consistent so we can update each other's work? For example:
    - Group similar elements or elements that appear together. Main one is a text box (TB). Use discretion for others.
    - Name groups and elements like this: "ElementType_Descriptor" where Descriptor is 1-2 words with no space. Examples:
        - TB_TitleCard (TB = Text box)
        - TB_Definition
        - TB_SpecialNote
        - Text_Definition
        - Box_Definition
        - Target_Create
        - Audio_1.1 (cell number in script)
        - Video_1.1

        - Picture_My90
    - Divide content across slides according to the script cell number.
    - Name slides like this: ScriptCellNumber_Descriptor. For example:
        - 1.1_Intro
        - 1.2_CreateRock
        - 1.5_Outro
        - Important for eLearning analytics if we want to track % complete more granularly.



Example of slide and element naming conventions

    - Theme
        - Color palette of Ninety brand colors.
        - Font type and size
            - Title - 24-35 Poppins semibold
            - Body - 14-16 Poppins normal
            - Bold within body - Poppins bold, same size as body.
            - List items - 12-14 Poppins normal, smaller than body
            - Whatever it is, make it consistent with other text in the same video.
        - Shape behind the text:

        - Shape - Rounded rectangle
        - Roundness - Minimal, based on size of rectangle.
        - Color - Black
        - Transparency - 10%
- **Timing** - Best practice for timing the mouse action and narration.
    - Intro slide
        - Title card for 3 seconds.
        - Start audio at 1.25 seconds.
    - Screencast narration and action
        - Temporal contiguity effect: Better transfer when corresponding animation and narration are presented simultaneously.
        - If narration takes longer than action, have action timed to end when narration ends.
    - Outro - 3 second version of bumper.
- **Assessments**
    - Result - Don't use defaults. Create lightbox layers triggered by response to be able to customize layout.
- **Transitions for slides and animations for elements**
    - Slides - Transitions are optional, but use the default 0.70-second fade in and out if using them.
    - Elements (highlight boxes and text boxes) - Default 0.75-second fade in and out.
- **Text box padding and location on screen**
    - Location on screen
        - Center if informative only.
        - Otherwise, next to content being talked about
    - Padding is difficult to measure, so make it look like below example.



Make padding look like this.

- **Application of visual cues** - When and where do we use these to emphasize mouse clicks and key points in the narration?
    - Highlights
        - Boxes for an entire area of the screen or elements being discussed but not clicked on.
        - For mouse click highlights (fka targets):
            - Don't need on popup boxes or dropdowns.
            - Use right before and during the click, but need a different target visual (see in Creative Needs below).
            - Avoid stating location of where to click in narration, in case the UI changes.
    - On-screen text boxes
        - Use at the beginning for the tool definition and its benefits. Then during the screencast for special notes.
        - Use special notes sparingly, to emphasize:
            - What is difficult about the step,
            - Essential for the learner to remember, or
            - Something important that's not on screen (i.e., role types).
    - Image overlay - When we need to show a different part of the platform momentarily (i.e., the meeting recap email received.)

File Naming and Storage on Google Drive

- **Folder hierarchy**
    - Shared Education Drive >> Product Education >> Learning Type >> Create a folder for the singular video or eLearning's assets.
- **What to save within the video/eLearning folder:**
    - Final Articulate video or HTML package.
    - Script
    - *.story file.
    - Archive folder? - To store older versions of the *.story file.
    - NOT the individual screen captures or audio clips.
- **Naming convention for files**
    - In general, LessonTitle_AssetType_YEAR_QUARTER (futureproofing here for when we start creating additional asset types).
    - For video to publish: LessonTitle_FINAL
    - LessonTitle_Script
    - LessonTitle.story

AI Prompts for Learning Design

Using Generative AI in Learning Design

"Sometimes we underestimate our role in how human AI is. Or how much it relies upon the human for it to be effective."

- Dr. Philippa Hardman

Quick Tips for ChatGPT

- To enter a new line in the prompt, press **shift + enter** at the same time.
- Education has a team account!
- Tommy put together 2 custom GPTs for Ninety. One for 90os content and one for EOS.

Essential Components of a Prompt

A well-crafted prompt can significantly improve the quality and relevance of ChatGPT's responses. Not all these components need to occur in every prompt. The instruction is really the only requirement. But use these three components at minimum to help you clearly articulate what you're asking for. Use them in this order so the GPT doesn't start writing more context instead of following the instructions.

First: Context

The context sets the scene for the request. It includes background information that helps ChatGPT understand the **purpose** behind the copy, the **target audience**, and the **environment** in which the content will be used.

Providing context helps tailor the response to your specific needs, making the content more targeted and effective.

Second: Role

The role is the **perspective or voice** from which ChatGPT should generate the content. This could mean asking ChatGPT to write from the viewpoint of a marketer, a customer, a product reviewer, or any other relevant perspective.

The role ensures that the content resonates with the intended audience and aligns with a particular voice and perspective (like a facilitator who trains business leaders on how to use business operating software).

Third: Instructions

This is what you want ChatGPT to do. Instructions can range from writing a product description to creating a course outline, generating a list of catchy headlines, or anything else. The key is to be clear and specific about the task, including any particular focus areas or constraints.

Clear instructions prevent misunderstandings and result in content that closely matches your requirements, saving time and effort in revisions. Consider these requests in your instructions:

- **Tone and style** - This could range from formal to casual, professional to playful, or any other style appropriate for your audience and objectives.
- **Keywords and phrases** - Particular topics you want the content to include, such as “enterprise value” (and its definition) or a quote from an expert.
- **Length and format** - Specify if you're looking for a 500-word blog post, a 100-word product description, or bullet points for a presentation.
- **Examples or references** - If there's existing content that embodies the style, tone, or format you're aiming for, include references to it in your prompt.
- **Constraints** - This could be avoiding certain phrases, emphasizing specific points, or adhering to brand guidelines.

Format of a Prompt

There’s no standard order. But it’s recommended to put the context first and the instruction last. With the instruction first, the GPT might start writing more context instead of following the instruction.

Use Case 1: Pre-Assessments

I used this prompt to generate the three questions for the Vision course, using three existing questions from the Baseline Assessment applicable to Vision.

Prompt

You are a learning designer training managers and individual contributors on the concept of a company Vision. You need to write three questions that assess the current state of their company's Vision in terms of its Goals and its Core Values. You need three questions, with five descriptive response options for each, designed as a Likert-type scale. Rewrite these three questions written for business owners to make them relevant for managers and individual contributors.

Choose the option that best describes your company's Goals.

A. We have not established goals.

B. We have some goals, but few employees know or understand them.
C. We have some goals and have shared them with our employees.
D. We have 3-Year, 1-Year, and 90-day goals (Rocks), but they are not widely shared.
E. We have clear and compelling 3-Year, 1-Year, and 90-day goals (Rocks) and have shared them with our employees.

Choose the option that best describes your company's Core Values (the ideal behaviors of your employees).

A. We have not established Core Values.
B. We have established Core Values, but they are not well communicated with our stakeholders.
C. We have established and communicated Core Values, but we don't use them to hire, coach, reward, or address poor culture fit issues.
D. We have established and communicated Core Values, and we sometimes use them to hire, coach, reward, and address poor culture fit issues.
E. We have established and communicated Core Values, and we consistently use them to hire, coach, reward, and address poor culture fit issues.

Choose the option that best describes your company's culture.

A. Generally, most people feel unhappy and unappreciated — like they don't belong.
B. Internally, we are mostly person against person.
C. My team is great, but the other teams are terrible.
D. Most of our employees are genuinely doing what's right for the company in the long term.
E. Almost all of our employees believe we're truly making the world a better place.

Response

Here's the full, unedited response from GPT-4:

For managers and individual contributors, it's crucial to assess their perception and alignment with the company's vision, goals, and core values from their vantage

point. This adaptation maintains the essence of your original questions but rephrases them to reflect the respondents' experiences and observations within their roles.

Question 1: Understanding of Company Goals

Choose the option that best describes your awareness and understanding of your company's Goals.

A. **Unaware:** I am not aware of any established goals within our company.
B. **Vague Awareness:** I've heard of some goals, but their details or importance are not clear to me.
C. **Informed:** I am aware of some company goals and understand their general purpose.
D. **Detailed Knowledge:** I know about our 3-Year, 1-Year, and 90-day goals (Rocks), but feel this information isn't widely known among my peers.
E. **Comprehensive Understanding:** I am fully informed about our clear and compelling 3-Year, 1-Year, and 90-day goals (Rocks) and understand how my work contributes to these objectives.

Question 2: Alignment with Core Values

Choose the option that best describes how your company's Core Values are reflected in your work environment.

A. **Undefined:** Our company has not established or communicated any Core Values.
B. **Known but Not Acted On:** Core Values are mentioned, but I don't see them being acted upon or influencing decisions.
C. **Acknowledged:** Core Values are communicated, but their application in hiring, coaching, and rewards seems inconsistent or unclear to me.
D. **Somewhat Integrated:** Core Values are evident in some hiring, coaching, and reward decisions, but application is not consistent across the board.
E. **Fully Integrated:** Core Values are clearly integrated into all aspects of work life, including hiring, coaching, rewarding, and addressing poor culture fit.

Question 3: Perception of Company Culture

Choose the option that best describes your experience of the company culture.

A. **Disengaged:** I often feel unhappy and unappreciated, as if I don't truly belong here.
B. **Competitive:** My experience is that interactions often feel competitive or adversarial.
C. **Isolated Excellence:** My team functions well, but I see or hear about issues in other teams.
D. **Generally Positive:** I believe most of us are committed to doing what's right for the company's long-term success.
E. **Highly Motivated:** I feel that almost everyone here is motivated by a belief that we're making the world a better place through our work.

These questions and response options are designed to gauge managers' and individual contributors' engagement with and understanding of the company's vision, ensuring that the assessment captures a wide range of experiences and perceptions within the organization.

Use Case 2: Scenario-based Questions

Prompt

You're a training facilitator teaching business leaders about the value of a clear and compelling company vision. You just taught them this: "I point our entire national community of employees to Ninety and say, this is what the vision is. This is where we're going. This is what we've committed to this year. This is where we are this quarter. This is how we're growing. And this is where we'll be in the next three to 10 years."
— Jennifer Zick, Authentic Brand

An organization's Vision is the expression of its highest aims — it defines how the company's people work, hopefully Work, to make their dreams a reality. A clear and compelling Vision helps you:

1. Become a great company. Few organizations scale without a strong sense of who they are and where they're going.

2. Get what you want. Making time to define your Vision is the best way to build the company you've always wanted.
3. Transform work into "Work." A clear Vision transforms routine tasks into purpose-driven actions, promoting a culture of engagement and commitment.

Now write a scenario testing their ability to transfer this knowledge. The scenario presents them as the leader of fictional business. The questions you want to ask after presenting the scenario are: What would you want this business to achieve? How would a clear and compelling Vision help you achieve that?

Response

Scenario: You are the CEO of a fictional company called Bright Future Enterprises, a technology consulting firm that specializes in helping businesses implement innovative solutions. Your company has experienced steady growth over the past few years, but you're starting to feel like you've hit a plateau. Your employees seem less motivated, and there's a lack of clarity about the company's direction. You know that in order to take Bright Future Enterprises to the next level, you need to reinvigorate your team and establish a clear and compelling vision for the company's future.

Questions:

1. As the leader of Bright Future Enterprises, what would you want the business to achieve in the next three to 10 years?
2. How would a clear and compelling vision help you achieve those goals?

Follow-up for Exemplary Responses to Questions

Love it! Now what would be an exemplary response to the two questions?

Exemplary Response:

1. As the leader of Bright Future Enterprises, I want the business to achieve several key objectives in the next three to 10 years. Firstly, I aim for us to become recognized as a market leader in the technology consulting industry,

known for our innovative solutions and exceptional customer service. Secondly, I want to double our client base and expand our services into new markets, both domestically and internationally. Additionally, I envision fostering a culture of continuous learning and development within our team, empowering them to stay ahead of technological advancements and deliver even greater value to our clients. Ultimately, I want Bright Future Enterprises to be a company that not only drives significant revenue growth but also makes a positive impact on the businesses we serve and the communities we operate in.

2. A clear and compelling vision would be instrumental in helping us achieve these goals in several ways. Firstly, it would provide a roadmap for our entire team, aligning everyone towards a common purpose and direction. With a clear vision in place, every decision we make and every action we take would be in service of that vision, driving greater focus and cohesion within the organization. Additionally, a compelling vision would inspire and motivate our employees, giving them a sense of purpose and pride in the work they do. This would lead to increased engagement, productivity, and ultimately, better outcomes for our clients. Furthermore, a well-defined vision would enable us to attract and retain top talent, as people are naturally drawn to companies with a clear sense of purpose and direction. Overall, a clear and compelling vision would serve as the guiding force behind our growth and success as a company.

I then asked for shorter responses, and ChatGPT gave me this:

Exemplary Response:

1. As the leader of Bright Future Enterprises, I want us to become a market leader in technology consulting, double our client base, expand internationally, and foster a culture of continuous learning.
2. A clear vision will align our team, guide decision-making, inspire employees, increase productivity, attract top talent, and drive our growth and success as a company.

Use Case 3: Multiple-choice Questions

For this, I used the same chat as the scenario-based questions. I wanted to update the free-form questions to MCQs. Here's what that exchange looked like. I had to do a lot of editing on this one. This was done in ChatGPT 3.5 (I hadn't bought the premium license yet).

Prompt

Turn the exemplary responses for this question into six multiple choice options for each question. Make the first three options correct and the second three responses incorrect. Make it hard for learners to determine what's correct and what's incorrect. Questions:

1. How do you think a clear and compelling vision could transform your team's work into purpose-driven actions?
2. In what ways do you believe a clear and compelling vision could help your team members love what they do and who they do it with?

Exemplary Response:
A clear and compelling vision has the power to transform our team's work by providing a sense of purpose and direction. When everyone understands the broader goals and objectives of our company, it gives context to the tasks we perform every day. Rather than simply completing assignments, team members can see how their contributions fit into the larger picture and how they're helping to advance the company's mission. This sense of purpose promotes a culture of engagement and commitment, motivating team members to go above and beyond in their work.

With a clear and compelling vision in place, team members are more likely to feel a sense of fulfillment and satisfaction in their roles. When they can see how their work directly contributes to the realization of the company's goals, it gives them a sense of accomplishment and pride. Additionally, a shared vision brings people together who share similar aspirations and values, fostering a sense of camaraderie and mutual support within the team. As a result, team members not only love what they do but

also the people they work alongside, creating a positive and fulfilling work environment for everyone involved.

Response

How do you think a clear and compelling vision could transform your team's work into purpose-driven actions?
A) By providing a sense of direction and aligning tasks with the company's overall goals, fostering engagement and commitment.
B) By stifling creativity and imposing rigid guidelines, leading to dissatisfaction and disengagement.
C) By allowing team members to work autonomously without any clear direction, resulting in confusion and inefficiency.
D) By limiting opportunities for personal growth and professional development, causing frustration and stagnation.
E) By discouraging collaboration and teamwork, hindering progress and innovation.
F) By focusing solely on short-term objectives, neglecting long-term sustainability and success.

In what ways do you believe a clear and compelling vision could help your team members love what they do and who they do it with?
A) By providing a sense of fulfillment and pride in their contributions to the company's goals, fostering camaraderie and mutual support.
B) By creating a competitive environment where team members vie for recognition and rewards, leading to resentment and division.
C) By encouraging a culture of complacency and mediocrity, stifling motivation and enthusiasm.
D) By promoting a toxic work environment characterized by favoritism and mistrust, eroding team morale and cohesion.
E) By emphasizing individual achievement over collective success, undermining teamwork and collaboration.
F) By neglecting employee well-being and work-life balance, leading to burnout and turnover.

Follow-up and Response

ME: Make the incorrect answers less obviously wrong

ChatGPT:
As the leader of Bright Future Enterprises, what would you want the business to achieve in the next three to 10 years?
A) Maintain the current status quo without any significant changes.
B) Experience exponential growth and expand into new markets.
C) Improve employee satisfaction and retention rates.
D) Downsize the company and focus on niche markets.
E) Continue to operate with unclear goals and direction.
F) Enhance customer service and product quality.

How would a clear and compelling vision help you achieve those goals?
A) It wouldn't make any difference; the company's success depends solely on market conditions.
B) By providing a roadmap for the team to follow and aligning everyone towards a common purpose.
C) By fostering collaboration and innovation to adapt to changing market trends.
D) By micromanaging every aspect of the team's work to ensure compliance with the vision.
E) By encouraging employee autonomy and independence to explore new opportunities.
F) By promoting a toxic work culture focused solely on achieving financial targets.

Use Case 4: Course Mapping

I used the 90os Enhanced GPT that Tommy created to produce this course map for the Vision Core Competency.

Prompt

I am a learning designer working for Ninety. I need to create a 3-lesson course on the Vision core competency for new Ninety users who are senior leadership team members.

The first lesson is about the concept, benefits, and focus filters. The second lesson is about how to use the Vision tool. The third lesson is about how to roll out the final company Vision to all Ideal Stakeholders.

Write a course map with three learning objectives for each lesson. For each lesson, include a pre- and post-assessment that aligns with the learning objectives.

Response

Based on the comprehensive insights from the provided materials, here's a structured course map for a 3-lesson course on the Vision core competency, including learning objectives, pre-assessment, and post-assessment components for each lesson:

Lesson 1: Understanding Vision - Concept, Benefits, and Focus Filters

Learning Objectives:

Explain the concept of Vision and its significance in organizational success.
Describe the benefits of having clear, compelling Focus Filters.
Identify and apply the Focus Filters in decision-making processes.

Pre-assessment:

- What do you understand by "Vision" in an organizational context?
- Can you list any benefits of having a clear Vision?
- Describe any previous experiences where focus or lack of focus impacted organizational decisions.

Post-assessment:

- Explain how Vision guides an organization towards achieving its goals.
- How do Focus Filters contribute to organizational focus and alignment?
- Provide examples of decisions filtered through the Focus Filters concept.

Lesson 2: Utilizing the Vision Tool

Learning Objectives:

Navigate and utilize the Vision tool within Ninety's platform.
Integrate company Rocks, Core Values, and Goals within the Vision tool.
Share and communicate the components of the Vision to team members effectively.

Pre-assessment:

- Describe your familiarity with any digital tools designed for organizational planning.
- How do you currently document and share organizational goals and values?

Post-assessment:

- Demonstrate how to input and update information within the Vision tool.
- Explain the importance of integrating Rocks and Core Values into the Vision tool.
- Discuss strategies for effectively sharing Vision tool components with the team.

Lesson 3: Rolling Out the Company Vision to Ideal Stakeholders

Learning Objectives:

1. Strategize the rollout of the company Vision to internal and external stakeholders.
2. Identify ideal stakeholders and customize the communication plan.
3. Evaluate the impact of the Vision rollout on stakeholder engagement and organizational alignment.

Pre-assessment:

- Who do you consider your organization's ideal stakeholders?
- What methods have you used in the past to communicate organizational changes or updates?

Post-assessment:

- Create a rollout plan for communicating the company Vision to different stakeholder groups.
- Discuss potential challenges in the Vision rollout process and strategies to overcome them.
- Assess the effectiveness of the Vision communication plan based on stakeholder feedback and engagement levels .

This course map is designed to not only introduce learners to the Vision core competency but also to equip them with practical tools and strategies for implementing and communicating Vision effectively within their organization.

AI Resources

Most of these are free. Because who doesn't love free knowledge?

- Dr. Philippa Hardman newsletter - Specific to learning design.
- Prompt Engineering Guide - Free.
- ChatGPT for Everyone - Free beginner course. This site offers paid courses too.
- Rundown.ai - Newsletter specific to the AI industry