OTTOLEARN
IMPLEMENTATION GUIDE

Last Updated: **September 23, 2020**

ottolearn® AGILE MICROLEARNING

NEOVATION MAKE LEARNING MAGICAL

Neovation.com

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ABOUT THIS GUIDE

Creating an effective training program can be an exciting, but daunting, task. You want to meet your training goals and prove that your investment was worth it. At the same time, you want learners to engage with the content in a way that raises their knowledge level quickly and allows them to retain that knowledge so that they can apply it when needed.

Many training programs fail to achieve these fundamental goals. Too often, there is no way to show or prove that your learners actually retained the knowledge or demonstrate that your training impacted performance positively.

OttoLearn offers an opportunity to revolutionize the way your organization thinks about and delivers training. Its innovative approach to teaching engages learners in ways that are scientifically demonstrated to improve mastery and retention.

> **CHANGE** IS THE END RESULT OF ALL TRUE LEARNING.
>
> —LEO BUSCAGLIA

When implemented as recommended, OttoLearn becomes a regular habit for learners. A 2-minute-a-day cadence seamlessly integrates into work days and continually reinforces essential knowledge and behaviors that improve efficiency, boost performance, and drive results.

OttoLearn is designed to be a more efficient learning experience, as well as a more efficient way to develop training content. Your organization can choose to self-implement, work closely with us, or work with one of our partners to implement your OttoLearn solution.

Regardless of how you choose to implement Ottolearn, this Guide will be an essential resource. It explains the options available, guides you through the process of planning and launching your training, cautions you to avoid planning errors, and helps you maximize the odds of achieving your desired outcomes.

Prior to commencing your implementation, we recommend reading this guide in its entirety, so that you understand the entire process.

BEFORE YOU BEGIN

A successful OttoLearn implementation depends on managing a mindshift change: With OttoLearn, training is no longer about completing a course with a *passing grade*. Instead, OttoLearn enables a continuous learning perspective that rewards learners for being able to confidently and accurately recall and apply knowledge.

Before you start, we recommend that you first become familiar with the underlying science of OttoLearn, to give you an understanding of *why* OttoLearn is as efficient and as effective as it is.

ACTION ITEMS

Read these white papers to help get into the Agile Microlearning mindset. Many of these ideas and concepts will be referred to later on in this guide.

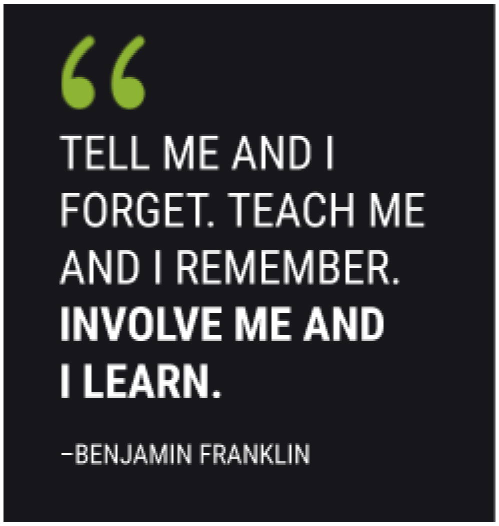
1. **The Case for Agile Microlearning**
2. **The Cognitive Science behind OttoLearn**

Subscribe to these resources to be notified about new features and important updates:

- **New Feature Alerts**
- **Maintenance Alerts**
- **YouTube Channel**

EXPERIENCE OTTOLEARN AS A LEARNER

Put yourself in your learners' place by achieving mastery in one of our **sample modules**. You may already **think** OttoLearn is a good way to learn, but after you actually experience how quickly OttoLearn helps you learn and retain knowledge, you'll become a passionate promoter.



BE PREPARED FOR INCREASED LEARNER ENGAGEMENT

Our user testing has shown that if learners are presented with training experiences even as short as 5 minutes, they will try to "schedule" the time. This leads to procrastination, as there are always competing priorities.

One major change with OttoLearn is that learning happens **every day** — not annually, quarterly, or occasionally. If managers communicate and socialize an expected daily cadence of learning at the start of the workday, we find, learners are less likely to put it off. OttoLearn's daily microlearning adapts to each learner's knowledge levels, efficiently and effectively delivering the training that each learner needs. Over time, these small sessions add up to a huge amount of instructional time, keeping critical information ready for instant recall.

With OttoLearn, we recommend that you condition your learners through your communication planning, and the **engagement schedules** you will configure, to complete 2 minutes of training at the start of their day or shift.

UNDERSTAND YOUR RESOURCES

Our team is here to provide all of the tools you need to launch a successful training program and support your learners. Check out some of our most valuable tools, described below.

Resource	Description
Support Center	Access our on-demand knowledge base from within the OttoLearn app by clicking the Help icon on any page, or visit our **support site** directly.
Support Team	If you ever have trouble finding what you need, contact us through our in-app chat or send an email to **support@ottolearn.com**. We're always happy to help our OttoLearn admin level users.

PART 1: PREPARE FOR YOUR IMPLEMENTATION

DEFINE YOUR GOALS

We believe that improving performance is the only reason to invest in training. To know if learners' performance has improved, you have to connect the dots and measure not just each learner's individual knowledge, but also their ability to apply it to their job. And to measure that, you need to have goals defined that link your learning objectives to your training program and to each learners' job performance.

What are you trying to improve? Do you want your call center employees to spend less time per call or achieve higher customer satisfaction scores? Do you want to reduce your safety incidents? Improve response times? Reduce employee turnover?

Whatever your industry, whoever your learners are, there are clear, measurable goals that will tell you whether performance is improving and your training program is succeeding.

We recommend that you **outline your goals:**

1. Learning Objectives
2. Job Performance Goals (these must be metrics you can measure)
3. Training Program Goals

Once you decide what you want to improve, you need to determine how you will measure success. Which metrics or KPIs will best show progress toward the outcomes you've identified?

Knowing this will allow you to really demonstrate the benefits of your training investment and share measurable results with stakeholders through our integrated analytics.

ProTip

If you're on an **Enterprise plan**, we will create for you a set of custom dashboards that will provide a unified view of your mastery, engagement and correlation to metrics and KPIs.

ACTION ITEMS

1. Determine your top goals for your OttoLearn training initiative. (This is how you will measure the success; what behaviors should change, and how.)
2. Select the first few Modules that you want to deploy through OttoLearn.
3. Determine what knowledge your learners need in order to influence the behaviors you've identified.
4. Determine specific Learning Objectives for each of these Modules and tie them to action words that would be measurable in job performance.

5. Evaluate Key Performance Metrics within your organization that relate to the content that will be provided in your Modules.
6. Decide on the key performance indicator (KPI), the metric, that will best demonstrate if the learners are applying the knowledge they gain from OttoLearn Modules
7. Review the standard set of OttoLearn **user attributes** and determine which ones you might want to use to evaluate learner data (e.g., position, region, district, job code — all the ways you will want to slice and dice the data about your learners for reporting later).
8. Design a communication/change management plan that focuses on the end goals, which metrics need to improve to achieve those goals, which behaviors drive those metrics — and how the training will align all of these elements

UNDERSTAND YOUR LEARNERS

Take time to reflect on who your learners are. This helps you to develop the most relevant content and design a communication strategy for your future rollout.

ProTip

In addition to conducting a detailed learner analysis, make use of **stakeholder analysis tools** to help with your change management communication. (Google "stakeholder analysis" to find many examples of tools and tables.)

What is your learners' level of prior knowledge?

Your learners will have different levels of prior knowledge and experience. Additionally, with different roles and responsibilities, they will require different depths of knowledge. For example, an experienced manager doesn't need, or expect, the same level of detail as a new hire, even when receiving training in the same topic area. And, while a training program that defines every term is helpful to a new hire, it would feel tedious to a more experienced employee.

If your audience includes learners with significantly different levels of prior knowledge or who need varying levels of detail, think of them as multiple cohorts. You can then create separate Modules for each cohort or use OttoLearn's **instructional scaffolding** to guide learners from basic to advanced knowledge.

Do you need to deliver multilingual training?

OttoLearn supports content in over 100 languages; its learner and admin applications are available in 20 different languages. Identify which languages you will need to deliver content in and who is responsible for reviewing and approving that content.

ACTION ITEMS

1. Determine your top goals for your OttoLearn training initiative. (This is how you will measure the success; what behaviors should change, and how.)
   a. Consider whether your learners need different levels of training
   b. Consider whether some cohorts have more prior knowledge than others
   c. Consider how members of each cohort are expected to apply the knowledge in their jobs: Do they just need to be aware? Do they need to be able to perform a task properly? Do they need to be able to evaluate and teach others?
2. Identify what languages you require for content and admin applications
3. Define your Pilot Launch
   a. List the learners who will participate in the very first OttoLearn deployment
   b. We recommend having a varied selection from your different cohorts and people who typically embrace change better than others because they can help be change agents when you launch to a broader audience
4. Define your rollout plan
   a. List the order in which you want to deploy OttoLearn content; this may depend on the number of cohorts and Modules you are using
   b. For example you may want to do your pilot and then launch your leadership training to all supervisors, prior to launching your IT security training to everyone

DEFINE YOUR CONTENT

What do your learners *need* to know to achieve your desired outcomes?

A traditional, comprehensive eLearning course contains an enormous amount of content — only part of which is actually needed to achieve your desired outcomes. That often requires investing a lot of course design time — with little to no increase in learning or retention.

Part of OttoLearn's Agile microlearning approach is to focus on core concepts and measurable learning objectives — and eliminate everything else.

In OttoLearn, you will build **two types of content.**

1. Activities, to teach and assess knowledge
2. Knowledge Cards, to provide on-demand performance support

Once you have identified the high-level Modules that you will deliver using OttoLearn, you need to consider the Topics and Concepts to cover for each audience. These are based on your learners and your performance metrics, and different cohorts may require different Topics. You should have specific learning objectives for each Concept you want your learners to master.

ACTION ITEMS

1. Read our detailed guide on **Creating Effective Content**
2. For each Module you identified, list the key Topics and Concepts to cover. Note that it is easy to add and update content in OttoLearn, so the initial list does not initially have to be all-encompassing.
3. For each Concept, define your learning objectives.
    a. Use **strong action verbs** to describe what the learner should be able to actually **do** when the objective has been met.
    b. Think to yourself, *how would I recognize that a learner understood this concept?*
    c. Link your learning objectives to the metrics that will drive achieving your goals; each learning objective should be tied to at least one performance indicator.
4. Verify that your learning objectives align with your goals and desired outcomes.
5. Match your learning objectives to the various learner audiences you have defined.
    d. Consider whether the the same objectives apply to every group, team, or position.
    e. Consider building a table to help you confirm that every point of learning is tied to a specific learner cohort, to specific objectives, and to a specific expected result.
    f. For example you may want to do your pilot and then launch your leadership training to all supervisors, prior to launching your IT security training to everyone

PLAN YOUR USER MANAGEMENT

Next, you need to plan out how you will manage the user accounts in OttoLearn and decide who will be responsible for their maintenance and upkeep. You will also need to define how you want your learners to access OttoLearn.

How will you manage OttoLearn user accounts for your learners?

Each learner will need an OttoLearn account. You must identify the user data that you will want to include in in your OttoLearn user profile, and define the process for loading those users (user provisioning), as well as processes for deactivating (or de-provisioning) users who leave your organization.

You may export this data from another system, such as a Learning Management System (LMS) or Human Resources Information System (HRIS), or it may be in a spreadsheet. You can use our **API** to build a user-sync. Or, you can **contact our support team** to import a spreadsheet of users.

ProTip

Enterprise plans can request additional user attribute fields and customize the ones that appear by default, including the names and order in which they appear. The information stored in these custom fields can then be used in the custom analytics package.

ACTION ITEMS

1. Identify your user data source. Ideally you should have a single source of accurate information.
2. Review the user data fields in your source data that may be useful for reporting (e.g., job codes, position titles, departments, sales regions).
3. Build a user field map, a table that maps each source data field to a standard user attribute; if you have an Enterprise Plan, make note of any attributes that you will need to customize or create in OttoLearn.
4. Determine the method for provisioning and deprovisioning users, both initially (for kick-off) and on an ongoing basis.
5. Identify who is responsible for maintaining user accounts:
    a. Will there be an automated process? If so, who will be the point of contact for managing the automation configuration?
    b. Will someone need to manually add new users and deactivate users on an ongoing basis? If so, who will own that process?

How will your learners access OttoLearn?

Your learners can access OttoLearn in a number of ways, depending on your existing training and IT infrastructure.

You do not have a Learning Management System (LMS) infrastructure, *OR* you have a LMS but don't want to use it with your OttoLearn deployment (e.g., licensing costs are too high).	
Direct (standalone) Access	In this scenario, your learners will access OttoLearn through your **company.mlearn.io** web app or our [OttoLearn mobile apps](). You will need to communicate login instructions and credentials to your learners.

You want learners to access OttoLearn through your LMS.	
LMS Integration	OttoLearn can ***generate a SCORM***[1] file from any Mastery Profile, which can then be loaded into an LMS. When a learner launches OttoLearn from the LMS, a single-sign-on (SSO) session will be initiated, and OttoLearn will open in a new window, providing the learner access. If the learners do not already have that Mastery Profile assigned, it will automatically be assigned at the time they launch the LMS course. All OttoLearn functionality will be retained; however, the learner will be locked into that particular Mastery Profile. They will continue to have access to complete Mastery Moments, Mini Moments (self-directed practice), and Knowledge Cards. Their mastery level and duration will be sent back to the LMS, and a complete status will be sent to the LMS when their mastery goal is reached for that Profile. Their information is always retained in OttoLearn, as well as their mastery. When a learner launches a LMS course with that same Mastery Profile, OttoLearn will adapt delivery to that learner, based on their past proficiency, and the amount of “forgetting” which has occured for that learner since they last engaged. The user must first exist in OttoLearn, which can be accomplished through manual entry or a ***API[2]-based user-sync***.

You currently use an identity management provider that supports OpenID Connect such as ADFS, Okta, or OneLogin.	
SSO with Identity Provider	Single-sign-on (SSO) is highly recommended for situations where your learners are already authenticated by another source, such as your network, and access OttoLearn through your mlearn.io portal, since it eliminates the need for them to remember additional access credentials. They can log in simply by clicking on an access link. In order to use SSO, your learners need to first have a profile in OttoLearn. You can develop an automated user-sync through our **API**.

[1] SCORM stands for Shareable Content Object Reference Model and is a standard technology format used for eLearning.
[2] API stands for Application Programming Interface, the technology used for the systems to communicate with each other.

ACTION ITEMS

1. Determine how your users will access OttoLearn:
   a. If it's through an LMS, then the learners must already exist within OttoLearn.
   b. If it's not through SSO, and you will use our mobile or web apps, determine how you will distribute log-in credentials to learners.
   c. If it is through SSO, determine where the access point (such as a SSO link) for users will reside.
2. Build into your communication plan a way to provide instructions to your learners.

> “
> IF YOU ARE NOT WILLING TO LEARN, NO ONE CAN HELP YOU. IF YOU ARE **DETERMINED** TO LEARN, **NO ONE CAN STOP YOU.**
>
> —ZIG ZIGLAR

PLAN TO MAXIMIZE ENGAGEMENT

How will you motivate your learners to engage?

Learners are always “too busy” to spend time on training that they perceive isn't valuable to them. Showing learners WIIFM (what's in it for me) is the key to motivating them to engage. The more you align your training to your learners' natural desires to be successful in their jobs and show them how training is relevant to their work, the less you'll have to chase them.

There are both extrinsic and intrinsic motivational factors you can leverage.

Extrinsic motivation comes from *outside* of the learner — for instance, a “reward” program that offers gift cards for reaching a mastery goal.

Intrinsic motivation comes from *within* the learner, and is therefore more powerful as it is self-perpetuating. This leads to the highest levels of engagement and retention.

Both types of motivation are valuable and both should be used together for maximum results.

ACTION ITEMS

1. Read our appendix on **Engagement Factors**, to reflect on how to promote engagement.
2. Determine how you will leverage intrinsic and extrinsic motivational factors.
3. Decide if you will implement a rewards program, and if so, plan it out.
4. Include in your communication / change management plan a description of how you will engage your learner cohorts.

How will you hold your learners accountable?

Improve accountability by getting buy-in from different levels of your organization. Each level can then hold the level below it accountable. For example, the HR department can hold managers accountable; managers hold supervisors accountable; and supervisors hold their direct reports accountable.

If your learners aren't engaging, there is a reason. Understanding that reason will allow you to leverage strategies to overcome the resistance.

ACTION ITEMS

1. Learn about **how to overcome learner resistance**.
2. Consider how you will leverage your organization's structure to have multiple levels of accountability.
3. Consider how you will communicate accountability to your team.
4. Determine your goals for engagement and what your process will be for managing learners who are not engaging.
5. Add to your Communication / Change Management Plan how you will communicate to leaders who will have an active role in monitoring engagement and holding accountability.
    a. How will your leaders access mastery & engagement data?
    b. How will you communicate to learners what the expectations are for them to be self-accountable?

BUILD YOUR IMPLEMENTATION TEAM

Building and deploying any eLearning content, including an OttoLearn project, involves team members performing a number of different roles. These roles don't have to be performed by different team members; for some small projects, every role except "pilot learner" may be performed by the same person.

Share this guide with your implementation team and any stakeholders who may help with communication and setting expectations. Encourage them to read the recommended material and experience OttoLearn as a learner.

This will encourage idea-sharing, increase focus, and generate more excitement around all of the benefits OttoLearn offers your organization and learners. Together, you will be able to make more informed decisions and plan out a more successful training approach.

ACTION ITEMS

1. Learn about **roles in your implementation team**.
2. Identify your Project Owner for implementing OttoLearn.
3. If you will have a large team, identify specific roles for team members.
4. Identify your technical resources if you will be building an API integration, or using SSO.

ProTip

All of your team members can access our training resources for free; however, only administrative level users can open tickets with the OttoLearn Support team.

BUILD YOUR COMMUNICATION AND CHANGE MANAGEMENT TIMELINES

Throughout these planning steps, we've recommended many opportunities to consider building your communication and change management plan. We highly recommend that you formalize this into a document that will evolve throughout the project.

Even early adopters might initially resist change. And most people are not early adopters; they may need to hear about your new training initiative three or four times before they are really ready to engage with it. Finding ways to build the enthusiasm and excitement **now** will pay dividends when it is time to deploy.

Study the elements you have put into your communication plan and outline the key messages you want to deliver to your various stakeholders. Schedule targeted messages; you can keep adding to the plan, but at this point, you should have a rough idea of the key points in the project that you will want to communicate to different audiences. Even if you do not yet have specific dates, you should document the communication flow.

ACTION ITEMS

1. Identify who will be responsible for communicating which messages to each audience.
2. Craft your preliminary introduction to OttoLearn, and send it out early. Build excitement!
3. Make an outline of the key communications you want to deliver at what milestone:
   a. Announcing what's coming
   b. Introducing the mindshift change — build excitement about what's new
   c. Send teasers of what is coming
   d. Plan for pilot communications
   e. Plan for accountability communications
   f. Plan for kick-off communications
   g. Plan for follow up communications

PART 2: CONFIGURE YOUR OTTOLEARN ACCOUNT

It's important for you to understand all the ways you can configure and personalize your account.

UNDERSTAND YOUR PLAN'S FEATURES

Features vary based on which OttoLearn plan you have subscribed to. Understand which plan you have, so that you know which features are available to you.

ACTION ITEMS

1. Identify your plan by visiting your **Settings > Overview** page.
2. Determine your plan's features by opening the plan comparison on the **OttoLearn website**.

BRAND YOUR ACCOUNT

OttoLearn has the flexibility for you to add your own branding. Follow our **branding guide** to personalize your account.

ACTION ITEMS

1. Gather your logo(s):
    a. You may choose to have different logos for your learner and admin apps.
    b. You will need a logo (or separate logos) that will work on light and dark backgrounds.
2. Upload your logos to your OttoLearn account.
3. Upload background images (optional).
4. Determine the keyword you want to use for your organization at (**https://keyword.mlearn.io**).
5. Customize the **default welcome video** (optional), or upload your own.

SPECIFY YOUR SUPPORTED LANGUAGES

Each user has a single display language, which is the language of the application interface. OttoLearn supports **20 display languages**.

However, your content can be developed in 100+ languages. Each user can have a list of **understood languages**, in a "priority" sequence. Otto will send them content based on their language priorities.

The content languages are configured at the Module level, and the display languages are configured within Account Settings.

ACTION ITEMS

1. **Set your primary and additional account languages**
   a. The primary language will be the default for new users.
2. If you plan to deliver training in multiple languages and require multiple understood languages per learner, please **contact our support team** for assistance.

Later, when you develop content modules, you can **enable specific languages** on a Module-by-Module basis.

CUSTOMIZE YOUR ENGAGEMENT SCHEDULES

Engagement schedules specify how often, and during what times of day, OttoLearn can send an email or in-app notification to nudge your learners to complete a Mastery Moment.

Each account comes pre-configured with two engagement schedules:

- “Default” which is set for 8 am to 5 pm, Monday to Friday. A learner may get notified up to three times during the day and encouraged to complete up to three Mastery Moments.
- “Anytime,” which disables notifications (learners will not receive engagement prompts).

ACTION ITEMS

1. Learn more about **how engagement schedules and notifications work**.
2. Learn the **engagement schedule configuration options**.
3. Review our **recommended engagement schedules**.
4. Determine if you will have different engagement schedules for different learner groups. For instance, you may want a different schedule for your leadership team, who work in an office, than for a team that works in the field.
5. **Create your engagement schedules**.

ProTip

The **engagement schedule** is always based on the learner’s time zone. Your users will be assigned your account’s default time zone, unless a specific time zone is assigned for them.

DEFINE YOUR USER ATTRIBUTES

User Attributes are data fields associated with your users. Every OttoLearn plan comes with a set of predefined attributes, such as First Name and Last Name.

These attributes are very useful for reporting and analytics.

If you have an Enterprise plan, you can request customization of your attributes, including:

- Adding or removing attributes
- Changing the labels of attributes (e.g. change “position” to be “job title”)
- Changing the order in which attributes appear in the **users view**, user **context panel**, and **mastery report**.

Regardless of your plan, you will need to decide which attribute(s) you will use for learners to log in to OttoLearn. (These username fields are denoted by a “key” icon in the user profile.)

ACTION ITEMS

1. Review the set of data fields that exist in your user source data and the field mapping you built in the planning process.
2. Review the **types of user attribute fields** that are available for your OttoLearn plan.
3. Determine which of your data fields you want to maintain in OttoLearn.
4. Determine which attribute(s) will be used by users’ to login, (e.g., username, email, phone number).
5. For Enterprise plans, you can **request modifications** to your default user attributes.

IMPORT YOUR USERS

With your user attributes defined and your user source mapped to those attributes, you are ready to import your users.

As discussed in planning, you should have decided if you are going to build an API integration to create an automated user sync for user provisioning/deprovisioning or if you are going to import your users from a spreadsheet through **our support team**.

ACTION ITEMS

1. If building an automated user sync, review our **API** with your IT team, or **contact our support team** to have a custom user sync created.
2. If you need to have your users imported, then follow these steps:
   a. Create your Excel spreadsheet with a column for each user attribute, and one row per user.
   b. Choose a unique attribute(s) for user logins.
   c. Contact **support@ottolearn.com** to request a user import, which can usually be completed within a couple of business days. A self-serve user-import feature will be available in the future.

ProTip

Your implementation will require both **users and content**. It does not matter if you create the users first or the content first; both have to be there. You can create content (in **Part 3 of this guide**) first, and import users later if you wish.

DEFINE YOUR SECURITY POLICIES (PERMISSIONS)

Along with our **master "Admin" flag** that provides full administrative control for a user, OttoLearn has an extensive and flexible security policy system available to Growth and Enterprise accounts.

Using these policies, you can establish rules for who can view and edit which users. For instance, you can implement a policy that allows store managers to add, edit, and view results for employees at their location. Or a policy that allows a regional manager to only view users and report on their engagement and mastery, but not edit those users.

The work you did planning your audiences, learning cohorts, and accountability should help you determine what security policies you need. You should also consider who will need to see analytics about user engagement and performance.

ACTION ITEMS

1. Determine who should have full admin capability:
   a. This list should be as small as possible.
   b. Edit those users and enable the "Admin" option.
2. Identify whether you require any custom security policies.
3. Understand the types of **security policies** that can be created.
4. **Request creation** of your custom security policies through our Support desk.

ESTABLISH SINGLE SIGN-ON (SSO)

Growth and Enterprise plans support SSO.

SSO is a way for a user who has already been authenticated in one system, to automatically be logged into a different system. OttoLearn supports the **OpenID Connect Single Sign-On (SSO)** method.

ProTip

Users on our mobile applications don't need to use SSO, since the mobile application will keep them logged in, and they can just launch the OttoLearn app by touching the icon.

Your organization's IT department can determine whether or not you can use SSO.

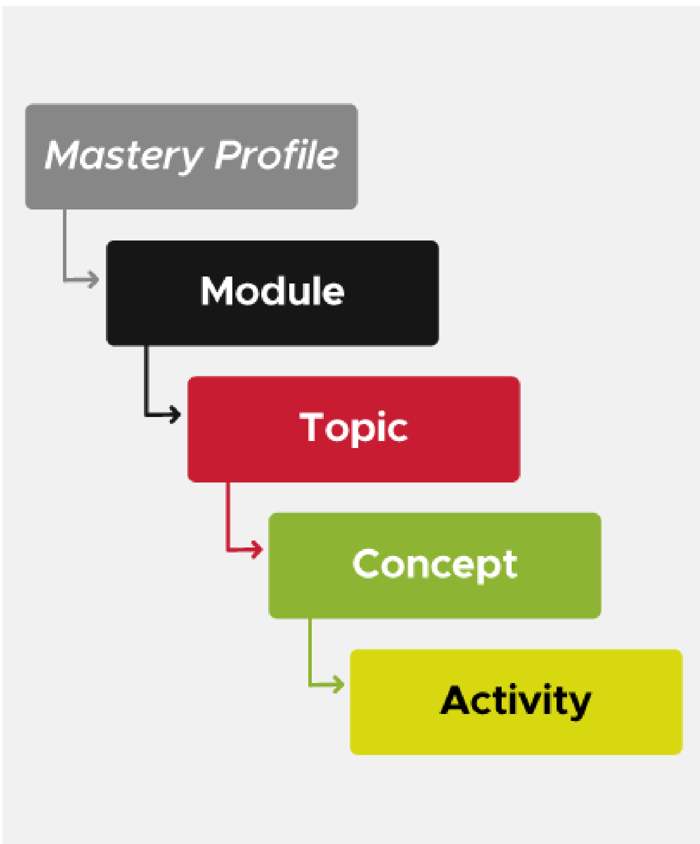
ACTION ITEMS

1. Determine if you can use SSO.
2. **Configure SSO**.
3. Determine where you will place the SSO link to launch OttoLearn.

PART 3: BUILD YOUR CONTENT

To create content for OttoLearn, you will leverage many of the same instructional design techniques used in traditional eLearning — but the implementation is quite different, as are the results.

The core concept to remember is that you will be assigning Mastery Profiles to users. A Mastery Profile is like a learning path or plan. Each Profile can have one or more Modules associated with it. Each Module will have Topics, Concepts, and Activities.



Mastery Profile
(ex: Security Training)
The overall subject matter to be mastered. This is what you assign to learners.

Module
(ex: Online Security)
A specific subject to be mastered. Modules contain the training content.

Topic
(ex: Password Security)
A specific objective within a Module.

Concept
(ex: Creating a Secure Password)
A specific idea taught through a series of activity questions. Concepts should focus on one idea at a time.

Activity
(ex: Which password is most secure?)
An exercise that teaches learners about a specific concept.

ProTip

Consider executing a **Rapid Scan**™, which is a fast assessment of your learners to uncover knowledge gaps. This can help you prioritize your content development.

If you choose to start with a Rapid Scan, follow the same content development steps outlined below, but sample a wide area of content, and only develop a single Activity per Concept.

ACTION ITEMS

1. Read our guide on **Creating Effective Content**. This guide will help you organize your training content, explain best practices for Activity design, guide you in creating feedback that's most beneficial to your learners, and present additional content creation best practices and tips.
2. **Request enrollment** in our OttoLearn Certified Administrator training:
   a. By enrolling in this mastery training module, you will automatically receive new training as it becomes available.
   b. Like all OttoLearn training, a couple of minutes a day is all that time that's required for you to quickly achieve and retain mastery. We recommend you start this as early as possible.
3. Considering the learning objectives and goals you defined earlier, decide which Module to build first.
4. Develop your knowledge map, based on our **Creating Effective Content** guidelines:
   a. Outline your content with the Module at the top, then list the Topics that you want covered in that Module.
   b. Continue the outline with which Concepts should be covered for each topic.
   c. Review your outline and make sure you have enough to get started, but don't worry about it containing **everything** for the Module. The beauty of OttoLearn is the ability to continuously add, adjust, and remove pieces of content while learners are using the system.
5. Develop your Knowledge Cards:
   a. With your outline in place, it is time to write your Knowledge Cards for each level.
   b. Download our **content template**. Knowledge Cards should contain all the information that the learner needs to know, plus can contain extra content not covered in Activities. In a traditional eLearning course, the Knowledge Cards equate to the "lecture" material.
   c. After you draft your Knowledge Card content, have it reviewed and confirmed by your subject matter experts.
6. Develop your Activities:
   a. Once your Knowledge Card content is confirmed, you can develop your Activities.
   b. Add your Activity questions, answers, and feedback to the same content template. (You do not need to add distractors — incorrect answer options — at this point.)
   c. Have your subject matter experts (SME) review and approve your Activity questions. (This is to prevent you from wasting time by coming up with plausible distractors for questions which your SME changes or chooses to not use.)
   d. Once reviewed, add appropriate distractors, and have your subject matter experts complete a final review.
7. Build your content from the template into OttoLearn using our **Content Studio**.

PART 4: CONDUCT A PILOT

Always conduct a pilot — or a series of pilots — prior to fully launching a new Module. For new deployments, we strongly recommend a phased rollout, consisting of several, increasingly larger pilots. The feedback from each allows you to improve and evolve the next iteration, which is deployed to the next pilot group.

USE A PILOT MASTERY PROFILE

Even though you've been exposed to the Activities heavily during the development process, you and your team will experience the Activities completely differently from the learner point of view. Seeing the content from a learner's perspective is a good way to catch formatting, grammatical, and minor issues.

Create a Mastery Profile specifically for your pilot group. Initially, your pilot group should consist of your project team.

PREPARE FOR TREMENDOUS FEEDBACK

When a traditional eLearning course is launched, Learning & Development (L&D) teams rarely receive much feedback from learners.

OttoLearn is different. Learners are more intimately engaged with the content, and thus, they behave differently. Since they are presented with only a handful of Activities within a Mastery Moment, they focus much more on the content, and are far more likely to submit feedback.

We've facilitated that by providing a **built-in mechanism for learners to submit feedback easily**.

ACTION ITEMS

1. Confirm the **engagement schedule** strategy appropriate for your pilot.
2. **Configure your account** to send learner feedback to one or more people who will triage and respond to submitted feedback.
3. Decide on your list of pilot learners:
    a. Identify a small percentage of your users with a representative cross section of knowledge/experience or solicit voluntary participants.
    b. Consider piloting different content with different learners (e.g., a different group each quarter).
    c. Ensure that pilot users understand their role. Ask them to:
        i. Examine content for accuracy, completeness, spelling, grammar, and clarity.
        ii. Complete several Mastery Moments a day. (The exact number of moments they should complete is based on the amount of content being presented to them, and the desired duration of the pilot.)

    iii. Take their time and read through all the material.
    iv. Provide detailed feedback for any errors, concerns or suggestions.
4. Test the effectiveness of your communication plan with your pilot users and update your communication plan based on their questions.
5. Run each pilot session for a set period of time, such as one week, and implement any changes between pilots.
6. Review your analytics to determine your learners' knowledge gaps, and confirm that these gaps are being reduced as their Mastery Level increases.
7. Review the results of all of your pilots with project stakeholders, and confirm your launch date.
8. Finalize and implement your communication plan.

PART 5: LAUNCH & ROLLOUT

Don't skip the pilot phase to go straight to a full rollout. The initial pilot(s) will generate a huge amount of valuable feedback, which will lead you to a smoother and more effective rollout.

ACTION ITEMS

1. Confirm the **engagement schedule** strategy appropriate for your learners.
2. Execute your Communication Plan:
   - You should have been promoting the OttoLearn Initiative before launch giving leaders and learners a heads up that it was coming.
   - Continue to perform internal marketing. Training, just like any other business initiative, must be promoted.
   - Communicate key messages to your learners about your microlearning project and how it will specifically benefit them — remember WIIFM.
   - Customize your messages based on the stakeholder and learner analysis you did during the planning phase.
   - Items you may want to emphasize include:
     i. A training session is called a "Mastery Moment"
     ii. Mastery Moments will be 2 minutes or shorter in duration.
     iii. Training delivery will be adapted to each learner. Learners who have more prior experience will move through content faster.
     iv. Learners can "drill down" into the training by clicking on a content card.
     v. Learners can choose to practice additional areas by doing a Mini Moment from any content card.
     vi. Learners may access OttoLearn through the web app or mobile apps.
     vii. OttoLearn is **not** a quiz; no one fails. If a learner doesn't know the answer to something, that is fine — the training will adapt to each learner's knowledge. (Don't underestimate how many times you will have to say this; for your learners this is one of the biggest mindshift changes they have to make.)
     viii. Learners will be asked how confident they are after each selection. They should respond honestly.
     ix. Knowledge Cards are available to access any of the training material whenever learners want.
     x. After the learner completes an Activity, they will have an opportunity to submit feedback. Spot an error? Think the question was ambiguous? Sending in feedback will help us improve the content.
     xi. Gaining proficiency by completing the activities increases learners' Mastery Level.

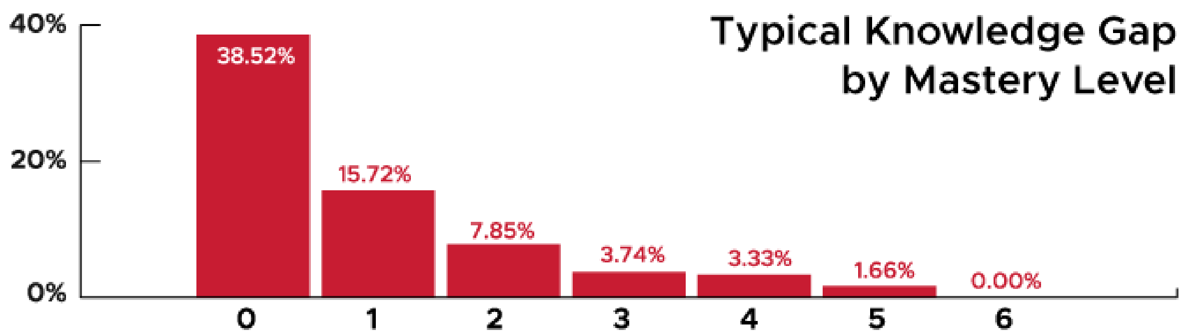
   xii. As learners reach their Mastery Goal for an area, they will receive fewer Activities from that area.

3. Ensure that engagement expectations are clearly communicated to learners. These include details like the number of Mastery Moments to complete at the start of a day or a shift.
4. Consider enhancing extrinsic motivation through an incentive program (e.g., weekly draws based on completed Mastery Moments, prize for first to achieve mastery).
5. Consider a progressive rollout if launching OttoLearn to a large number of learners. For instance, if you are rolling out to multiple retail locations, roll out each region separately, and then roll OttoLearn out gradually within each location.
   - For example:
      i. Assign the training to store managers first, and give them two weeks to achieve their Mastery Goal.
      ii. Roll out to employees after two weeks, with those managers providing accountability.
      iii. Repeat for each region.
6. Celebrate!!! Part of your Communication Plan should include celebrating success!

PART 6: EVOLVE & ADAPT

The wealth of analytical data you'll get from OttoLearn's integrated analysis tools makes it easy to understand where OttoLearn is making an impact.

If you are on our Growth or Enterprise plan, you will be able to use our detailed analytics to verify and confirm that your learners' knowledge gaps are shrinking as they increase their mastery levels.



If your analytical data reveals additional knowledge gaps, build more content around those areas.

Modify your content based on submitted feedback. Doing this on an ongoing basis helps promote learner buy-in and engagement, as they get a consistent message that training quality matters and that you value their experience.

If you are not achieving your desired outcomes, trace it back to the content. Is there a gap in your content? Are learners failing to complete training?

With **Agile Microlearning** and OttoLearn, your training is not one-and-done. Keep tuning and evolving it to reach your desired outcomes.

APPENDICES

APPENDIX A: CONSIDER ENGAGEMENT FACTORS

Understanding the following engagement factors will help you design a communications strategy as well as decide whether to leverage extrinsic motivational factors. The table shows possible learner actions, which type of motivation (intrinsic or extrinsic) it reflects, and a description of the possible outcome or underlying drive.

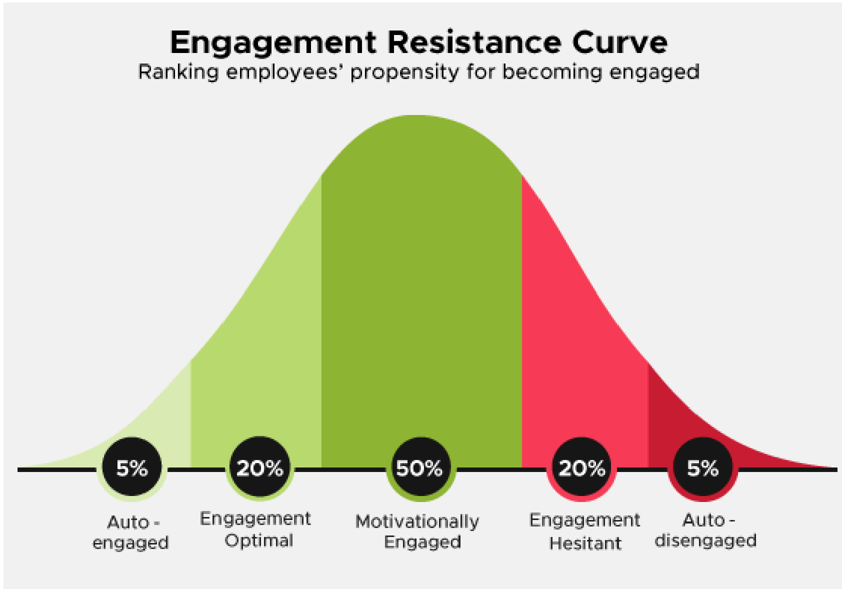
Learner Action	Motivational Factor		Description of Possible Outcome or Underlying Drive
	Intrinsic	Extrinsic	
Searching for content through Knowledge Cards	X		Seeking information to support the execution of their jobs.
Making progress towards their mastery goal	X		Many learners will self-engage, and make steady progress toward their mastery goals.
Reaching their mastery goal	X		Many learners will be self-motivated to achieve a goal.
Reaching their mastery goal		X	A good opportunity for an incentive such as a prize or participation in a draw for extra motivation.
Receiving an unexpected reward		X	An instant win provides a moment of delight; this moment may be small, but it can still be quite meaningful.
Submitting feedback on content	X		Many learners enjoy reporting issues — as they want to participate in improving the training experience. Rapidly triaging their feedback and letting them know if their requested changes will be considered. However, this can turn into a negative — reducing motivation — if feedback is ignored.
Submitting feedback on content		X	Feedback can also be increased by offering extrinsic rewards — such as points for accepted feedback or gift cards for great suggestions.
Falling out of mastery	X		Fear of loss is an important motivational factor for many individuals. Let them know that mastery is lost over time if they stop engaging.

"Completionist" personality	X		Some learners want to "finish" a task or to do as much as they can on it. This is the same personality trait that drives collecting. These learners will want to achieve mastery on all available concepts to complete their "collection."
Improving their own efficiency	X		Some learners are motivated by feeling that they are doing as much as they can to improve their performance.
Wanting to be perceived as a team player	X		Wanting others to see them as someone who participates and can be counted on can be a strong motivator for some learners.

APPENDIX B: OVERCOMING LEARNER RESISTANCE

There will be varying levels of acceptance and natural resistance to any change; some individuals will always be early adopters; others will be stragglers, but most fall in between.

These groups are described through employee engagement expert Tracey Maylett's Engagement Resistance Curve, which defines five levels of engagement resistance.



Source

Engagement Category	Description of Learner
Auto-engaged	Automatically engages with every new initiative. An early adopter.
Engagement Optimal	Doesn't engage quite as fast as the auto-engaged group, but responds positively to new initiatives and is generally optimistic. Doesn't require much prompting.
Motivationally Engaged	Most learners will fall under this category. They are willing to engage, provided that they understand the value of the initiative.
Engagement Hesitant	These learners would rather not engage. They may consider themselves "too busy" or simply have doubts on the value of the project. They might also believe that, if they put up a bit of resistance, they can "get out of" doing the training.
Auto-disengaged	You'll have to consistently nudge and prompt these learners to get them engaged. They appear to be immune to rewards or other forms of positive encouragement.

Understanding common learner resistance factors will help you proactively overcome them.

Resistance Factor	Strategies to Consider
Content is too easy	Review your content and watch for distractors that are obvious; avoid over-use of true and false Activities, which can make the content too easy. Once you've validated your content, consider separating it into different Modules to target prior knowledge. Consider using Knowledge Cards for basic knowledge that can be assumed and to add supplementary information.
Content is too difficult	Review your content and watch for ambiguous or "trick" questions. Once you've validated your content, consider using instructional scaffolding to build a foundation of knowledge and gradually guide each learner to the correct level.
Takes too long	It is rare that OttoLearn learners indicate that a learning session is too long. Mastery Moments are designed to take no more than 2 minutes, and self-directed Mini Moments, where a learner chooses to perform additional activities in a particular area, take no more than 1 minute. If learners are saying that training is taking too long, the first thing to look at is their **engagement schedule**. Our **recommendation** is that in most cases you set required daily Mastery Moments to 1 and desired to 3. With this recommended configuration, a learner who must still reach a mastery goal or is in danger of falling out of mastery, will be prompted to complete up to 3 Mastery Moments per day. Alternatively, you can set the minimum required Mastery Moments to 0, which means that learners will only be prompted to complete Mastery Moments when a concept is in danger of dropping below their mastery goal. This is calculated with our *applied forgetting* algorithm which reduces a learner's mastery over time, to account for natural forgetting. Our recommendation is to set your Mastery Goal to 3. If you set your goal to be 4 or 5, your learners will have to complete many more Activities to stay above their goal level. One other consideration is your content scaffolding. If you have over-scaffolded your content, it may take a long time for learners to reach their mastery goal.

Too many activities	OttoLearn's algorithm calculates the duration of an Activity, and estimates the number of Activities each learner can complete within a 2 minute (Mastery Moment) or 1 minute (Mini Moment) timeframe. This calculation is based on many factors, including the learner's Mastery Level on each Concept. The higher a learner's Mastery Level, the more Activities they will receive, however, the overall duration will stay constant.
Forgetting to engage	"I forgot!" is a common excuse, and means "I didn't think it was important enough to prioritize." You can fight this by building transparency and accountability into your program. For example, by ensuring that each level of your management is holding the next level accountable. You should also make sure that you have notifications enabled. A learner will either receive email notifications or in-app notifications if they are using the mobile app and have notifications enabled on their device.
Perception of no benefit	This can happen in a few situations: 1. The learner has extensive prior knowledge and experience, and thus feels that the training is below their knowledge level and not worthwhile. Consider setting your required daily Mastery Moments to 0 . With this setup, the system will only engage your learners when it determines that they are not yet at their mastery goal or there are new Concepts for them to practice. 2. Learners may be auto-disengaged. They don't want to engage, and "you can't make them." They are being willfully disobedient. This is now an HR issue.

APPENDIX C: YOUR IMPLEMENTATION TEAM

Whether you are one person wearing many hats, or you have a full L&D team, it's important to understand the different roles in an OttoLearn implementation.

Project Owner	Obsessed with improving target KPIs, this person has the final authority to make decisions about content and implementation. Ideally this is a single person, however, in reality, the individual who is responsible for improving KPIs may be different from the person who has authority over learners.
Project Manager	This is the project task master, the person who will manage the timeline and communicate with the project owner and all team members. This person is detail-oriented and focused on making sure users get put into the system, that content is delivered to them on time, and that reports show results.
Communications Manager	This is the person who is responsible for messaging and setting expectations with the learners and stakeholders of the organization. This role is often combined with the Project Manager role.
Content Owner	This is the subject matter expert for the content. This person may also serve as the Instructional Designer, or they may simply be the person that the Instructional Designer works with to develop content.
Instructional Designer	As with any training project, your Instructional Designer (ID) is responsible for interviewing your subject matter experts (SMEs) to create new content or validate existing content. The ID also creates and maintains your knowledge map and Activities.
Learner Coach	Many learning managers are pleasantly surprised to discover that learners engage far more with OttoLearn content than they have with past eLearning content. Learners will debate best practices. They will request modifications to the content. They will send you feedback. The person who receives and triages these requests, and who coordinates pilots and rollouts, is the Learner Coach.
Graphic Designer	While much of your content effort will be instructional, you may require some instructional graphics to support knowledge transfer within activities or Knowledge Cards, Additionally, you may wish to create specific graphics for branding your account. The Graphic Designer handles these tasks.

Quality Assurance Support	You'll need an eagle-eyed QA person, ideally someone other than your instructional designer, to review the content for structural or grammatical problems, factual accuracy, and other essential quality metrics.
Information Technology Support	If your project includes setting up single sign-on (SSO) or an integration with other systems (for instance a user sync from an HRIS platform), then you will likely need involvement from someone in your IT team.
Pilot Learners	We cannot overemphasize the importance of a pilot test. Rather than roll out your training to all of your learners at once, plan for multiple groups of pilot learners. This allows you to be certain that the content is accurate and that the technology works on all platforms and devices across your organization.
Subject Matter Experts (SME)	Your SMEs are crucial to your content development. Ensure they understand how OttoLearn works - and how it is different from traditional eLearning.

APPENDIX D: ENGAGEMENT SCHEDULE STRATEGIES

We recommend different **engagement schedule strategies** based on your industry or the work style of your learners.

	Required	Up To	Other Settings	Communication Strategy
Corporate training	0	3	Monday → Friday	Do a Mastery Moment when prompted.
Shift Workers (call center, retail, franchise)	1	3	• Sat > Sun • 24-hour clock • Turn off notifications	Do at least one Mastery Moment at the start of your shift.
Exam Prep	0	10	• Sat > Sun • 24-hour clock • Turn off notifications	Do as many Mastery Moments as you want, until OttoLearn tells you to stop for the day.

APPENDIX E: CONDUCT A RAPIDSCAN™ TO IDENTIFY KNOWLEDGE GAPS

Where are your learners' knowledge gaps? Odds are you don't really know.

Our RapidScan process is designed to uncover these gaps, so that you can strategically build content that prioritizes the most valuable areas first.

The RapidScan process is similar to our full content development and deployment as described in this Guide, however, instead of building comprehensive content areas, you develop Activities spread out across multiple knowledge areas. This allows you to use analytics to more accurately identify where knowledge gaps exist.

Performing a RapidScan

1. Choose content areas:
    a. We suggest choosing three areas where you are confident that learners will demonstrate competency and three areas where you have concerns about retention or accurate understanding.
    b. Within those areas, identify 50-100 Concepts that learners should know.
    c. Develop a single Activity for each Concept.
2. Define a group of representative learners.
3. Deploy the training to a representative set of your learners for a single week.
4. Examine the analytics from the week to determine where the largest, and most important, knowledge gaps are.

Use the knowledge from your RapidScan to prioritize content development.