

Case Study: Use of Mobile Learning

Product: Improve your negotiation skills in the Virtual World – It can be done!

Company: IBM Center for Learning and Development.

Today's economic business environment demands a lot of innovation and creativity to achieve cost-effective learning solutions that focus on building deeper skills.

The IBM Center for Learning and Development (IBM CLD) is demonstrating that virtual world technology, when coupled with interactive design activities, can be effective to help build deeper skills. It has created a nice fit between virtual learning and its current business situation, which currently limits traditional classroom learning due to the high cost of travel and living.

All of the company's learning design, development, and delivery is focused on closing prioritized skills gaps that align with its business objectives. This alignment directs the company to fit the need to the business by improving the negotiation skills in its Project Executive (PE) community. The PE is primarily responsible for customer satisfaction, revenue growth and contract profit and loss. To grow revenue requires new business solutions, which are sold by negotiating existing service contracts. This is a key business objective for the PEs, and requires acute negotiation skills. The PE job role is critical to IBM and is major influencer to its existing customers and future business.

Within its current inventory of learning assets, the company offers various classroom negotiation courses, but it wanted to provide additional learning options that are more cost effective and innovative. This led it to explore the virtual world technology as a platform for learning. The research team created a "rehearsal island" within the Second Life operating platform, which enabled us to design, develop, and deliver virtual learning.

Adapting virtual world technology to a learning environment for "social networking or new product type marketing" is done routinely by many different organizations. Other uses of the technology to "build negotiation skills" in a virtual environment is extremely challenging. One of IBM CLD's biggest challenges is the technology itself and understanding the constraints and work-arounds. Technical readiness is a challenge especially when the students are using various models of personal computers. We created a module just to configure the student's computer to optimize the use of the technology before they start any skill development type of learning. This included adjusting preferences for audio, external Web browsing, volume controls, video, and other settings relating to "focusing" for textual and image type information.

Another constraint the company is working to resolve is when multiple people try to use the same object at relatively the same time. For example: If student 1 is advancing PowerPoint slides and if student 2 is in the same room and clicks on the same set of slides they also advance the slides. So, in effect, they compete for control of the PowerPoint and this disrupts learning. IBM CLD is exploring options of duplicating rooms to avoid this constraint.

Learning Object Support

From a new design perspective, it is extremely challenging to “find the sweet spot” in the virtual world to enable the learner to have a “rich learning experience” especially for building negotiation skills. Persistence must prevail to succeed in the virtual world. The company’s key to make virtual learning fit the needs of the business is using “interactive learning activities.” Interactivity for the student keeps them engaged and focused on learning without ever leaving their office. This is the benefit for the company and the student.

The primary learning objectives at the **program level** are as follows:

1. Build negotiation skills at the applied level
2. Make the program an alternative to existing courses
3. Optimize the use of virtual technology to be cost effective
4. Reuse any existing content to reduce development costs

The primary learning objectives at the **course level** are as follows:

1. Provide learning by using PARR (prepare, act, review, reflect) method
2. Provide interactive learning that ensures a “learn by doing” experience
3. Establish a student baseline skills assessment of Best Practices for Negotiation
4. Provide a resulting negotiation scorecard from peer observations
5. Provide a facilitated peer-to-peer discussion following the negotiation
5. Provide a replay of the recorded negotiation to gain insights

The primary learning objectives at the **student level** are as follows:

1. Learn how to prepare to negotiate using various job aids
2. Learn how to negotiate with a virtual client by addressing real client issues
3. Learn how to improve negotiation skills based on peer feedback
4. Learn how to improve negotiation skills by replaying the negotiation

In addition to an inventory of existing classroom offerings, the company has various high-quality resource documents that support various negotiation topics along with several methods, tools, and processes. However, its experience indicates that it is difficult to get people excited about reading a resource document that is 50 to 100-plus pages, especially on the topic of negotiation, without experiencing any kind of interaction with another person. It is like learning to “swim,” but never getting wet. IBM CLD needed something new, something innovative and different.

So its continued pursuit of innovation led the company to a new type of virtual learning solution that would also enable us to apply our proven PARR (prepare, act, reflect, review) design method. The solution of coupling virtual world technology with interactive learning activities proved to be the best fit for our design criteria and is helping us build negotiation skills while being cost effective.

The virtual learning offering is targeted at anyone who needs to build their negotiation skills, whether in a client facing job role or not. However, the initial learning design does

have a preference toward the PE community that is responsible for growing revenue at existing accounts, which requires acute negotiation skills as already mentioned.

The Course Specifics

This virtual course is based on a simulated customer situation where IBM has presented a proposal to the client for a variety of services including outsourcing. It is by design that the subject negotiation content is fairly generic and can easily apply to many job roles. The company's business case sets the expectations and provides the guidance for the learning activity. For example, the client has read the IBM proposal and has three issues that need negotiating before a contract can be signed. The PE now has to "get prepared" for the upcoming negotiation and needs to establish a win/win negotiation strategy to address each client issue while meeting IBM's business objectives. The following paragraphs describe the course design to ensure a successful negotiation by enabling the student to virtually experience what could take place in a real-world situation. The future design may include various industry specific negotiation courses to make the content more relevant to the PE's industry focus.

The program design is built around the Second Life technology, but is also integrated with other technologies like streaming video, use of a wiki, live recording, and an external link to the IBM Learning Management System (LMS). The program also provides peer-to-peer feedback, coaching/facilitation, and an automated skills assessment scorecard. All of these combinations of technologies help the user have a rich learning experience. The course itself is designed around four groups of activities as stated below.

Course Wiki - a special course wiki is designed to organize pre-read materials that are aligned to each of three learning labs. In addition, the wiki is used as a repository for intellectual capital that is collected during one of the learning labs.

Learning Lab 1 - is focused on technical readiness to ensure the technology is optimized for the student prior to any skill development.

Learning Lab 2 - a non-facilitated series of learning activities that are all focused on preparing to negotiate."

Learning Lab 3 - is a facilitated session and focused on a virtual "client facing negotiation." Lab 3 also includes a client role and up to three observer job roles. All of the labs are conducted in the virtual world.

Course Wiki Overview: The course wiki is specifically designed to link into the virtual world and is the repository the pre-read materials for each Learning Lab. The pre-read materials include documents such as: course overview; participant's guide; negotiation job aid, individual learning activity job aids, and detailed instructions. The pre-material help the student understand the context of the course and provide a printable resource document if desired.

Another component of the wiki is focused on the "Reflect and Review" design. The wiki prompts the student to answer six different "how and why" type questions that pertain to their existing accounts. Each answer is retained in the wiki and documents "real-world" experiences from the student and is perceived as great value. Each student can post their

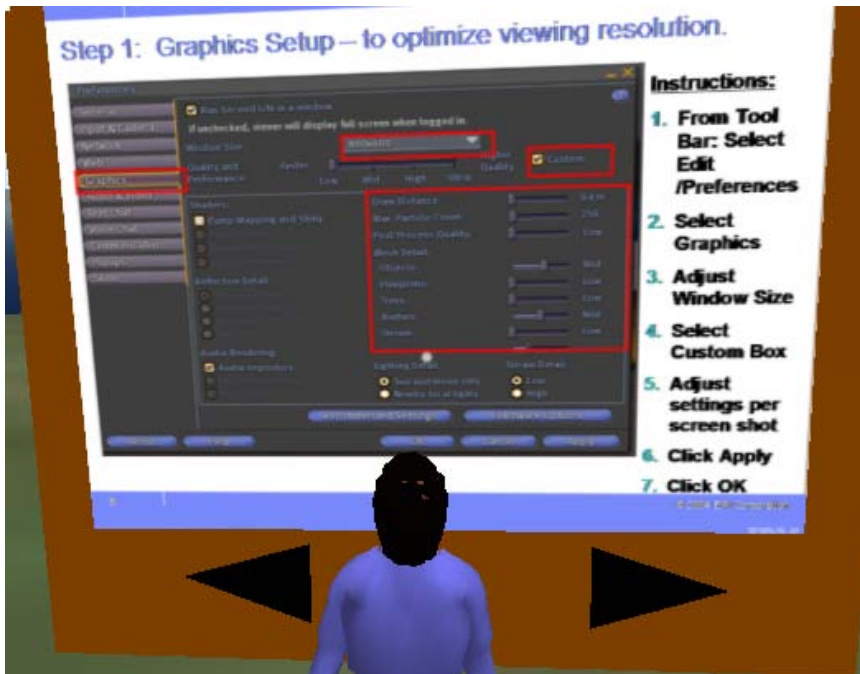
own comments and can reply to comments from previous students. In effect, the company collects intellectual capital that can be used by each student to learn from their peer's personal experiences. They also may reply to the comments and build upon the knowledge base that is shared by others.

News	Welcome to the PE Virtual Negotiations Home Page.
1. Getting Started	<u>Instructions:</u>
2. Lab 1 - Pre-Read Doc	1. Please use the left menu to sequentially read the information contained in items numbered 1-4. It will help you understand the design of the course and the flow of the learning activities.
3. Lab 2 - Pre-read Doc	
4. Lab 3 - Pre-read Doc	
5. Order Headsets	
6. FAQ	Added by Bill G. Barker , last edited by Bill G. Barker on Feb 05, 2009 (view change) Labels: (None)
7. Reflect and Review	Info
7a. Executive Insights	
7b. Influence Gaps	
7c. Client Issues	0 comments
7d. Body Language	
7e. Final Activity	

[Wiki Screen Shot]

Lab 1 - Technical Readiness Overview: This lab provides direction on how to set up your computer to optimize the use of the virtual Second Life technology. The idea is to resolve any technical issues in this technical lab prior to any skills learning lab to prevent any distractions. The pre-read materials provide step by step instructions with screen shots for downloading the software and computer setup. The setup activities are reviewed in Second Life which include setting preferences for:

- Audio
- Video
- Voice chat
- Web
- Graphics
- Speaker and Microphone



[Lab 1 - Sample Screen Shot]

Lab 2 Overview: This lab is completely focused on learning how to “Prepare for an upcoming Negotiation.” It is designed as a stand-alone self-paced module with its own course code. It begins with the student reading the Welcome Instructions that are posted right outside the virtual IBM meeting room. These instructions provide an overview of what to expect during the learning lab. The “prepare to negotiate” lab involves the student engaging in five unique learning stations plus one “reflect and review” station. Each station has its own set of student instructions. The following pages provide a summary and a sample screen shot of each learning activity.

Station 1 – Understanding Executive Insights

This activity focuses on gathering your functional manager’s executive insights which helps set your negotiation priorities for IBM. The design includes:

- A streaming video to display four executive insights
- An executive summary slide that toggles the display on and off



[Station 1 – Screen Shot of executive providing senior management insights using streaming video]

Station 2 – Understanding body language when negotiating

This activity focuses on the reading four different areas of the body what messages are being communicated. This information is a key to a successful negotiation. The design includes a:

- Brief set of slides discussing how to read body language when negotiating
- A four-minute video showing different body poses and what they communicate. The video is accessed by linking to an internal LMS.
- An interactive learning exercise of viewing various pictures of people and then selecting the appropriate negotiation message of receptive or non-receptive



[Station 2 – Introduction Screen Shot]

Station 3 – Know the Client Issues and appropriate Negotiation Strategy

This learning activity focuses on using a negotiation preparation worksheet to help understand the client issues, the needs of IBM team and discovering possible alternatives and options. It also enables to student to focus on preparing a strategy to deal with each client issue prior to the negotiation session. The design includes:

- An interactive learning activity to match the best negotiation strategy for each of three client issues
- Provides pop-up note cards for additional guidance explaining why multiple strategies can work or not work depending on how the client responds.

Possible Negotiation Strategies		Maintenance Outsourcing	IT Business to IBM
Bring in another vendor(s) as a Partner(s) in the solution.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Increase the frequency of performance reviews to demonstrate IBM's is proactive in resolving Client Issues.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Use other Customers as a reference to showcase IBM's out sourcing capability	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Use 3 rd party objective data to support IBM outsourcing leadership and capability	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Explain how additional deskside support can benefit the client by optimizing IBM resources to reduce cost while improving performance.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Discuss IBM's Partnership with leading ERP vendors	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Discuss how adding more IBM services can alleviate multi-vendor issues that client would deal with.	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

[Station 3 – Screen Shot of matching exercise]

Station 4 –Identify the PE Influence Gaps

This learning activity focuses on client relationship mapping as a key element to identify understand influence gaps. Closing the relationship gap is a key factor to a successful negotiated contract. The design interactive exercises that includes:

- An IBM team review that includes what is needed from each IBM team member for the final contract.
- Relationship mapping review for influences, differs, antagonist, and who is on the client negotiation team.
- Identification of the influence gaps based on client profiles
- Instant guidance for how to close the identified influence gaps.
- Gap closure summary when exercise is completed

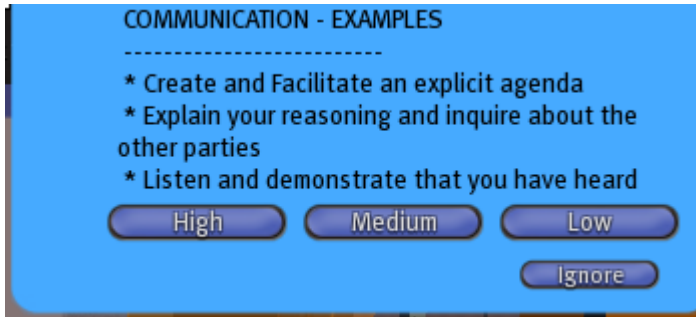
The screenshot displays an interactive relationship map. On the left, a 'Client Organization Structure' diagram shows a hierarchy starting with a 'Sr VP' at the top. Below are roles like 'CIO*', 'VP Mkt', 'CFO*', and 'VP Procurement*'. Further down are 'Director Enterprise Systems', 'Director Outsourcing*', 'Director ERP Systems', and 'Subsourcing Manager*'. On the right, a profile for 'Position: Client Sr VP' is shown, featuring a photo and text: 'Critical Fact: Less than 2 years at the company', 'Expects IBM to: Deliver what they promise and set the quality standard', and 'Role: Final Decision Maker'. At the bottom, a 'Gap:' section has 'Yes' and 'No' buttons. A legend at the bottom left defines 'Influences' (blue arrow), 'Deference' (green arrow), and 'Antagonism' (red arrow). A person's head is visible in the foreground, partially obscuring the bottom of the screen.

[Station 4 - Screen Shot]

Station 5 – The Seven Best Practices for Negotiation

This learning activity focuses on knowing the seven best negotiation practices and allows the student to rate their skill using a high, medium, low scale. This establishes a baseline of negotiation skill for the upcoming client facing negotiation in Lab 3. The design includes the following interactive learning exercise:

- Engages the avatar student to select (point and click)
- Displays keywords within each best practice statement.
- Displays a note card with three examples, which enables the student to accurately rate their skill.
- Skills assessment summary is provided and allows student to change their mind if necessary



[Station 5 – Screen Shot of skill assessment “pop-up” note card in Second Life]

Station 6 – Reflect and Review

This learning activity is a link to the course wiki that enables users to complete Lab 2 by answering five key questions that requires reflection and review. The design includes:

- A thought-provoking question that enables the student to post their comments using their own experience
- Option to reply to previous students comments
- Captures intellectual capital that is available for reference

News	<u>Instructions:</u>
1. Getting Started	1. This part of the course is designed to allow you to "Reflect and Review" about what you have learned and then "add your comment" to answer a key learning objective.
2. Lab 1 - Pre-Read Doc	2. Here is a question: How can the relationship map help you identify the "PE" influence gaps in <u>your account</u> ?
3. Lab 2 - Pre-read Doc	3. Use the "add comment" link below to type in your answer and then select "post".
4. Lab 3 - Pre-read Doc	4. You may also read other people's comment and reply to them as well.
5. Order Headsets	5. This exercise captures key practical insights that are shared with all participants of the course.
6. FAQ	6. After posting your comment, please continue by clicking on Section 7c. Client Issues
7. Reflect and Review	
7a. Executive Insights	
7b. Influence Gaps	
7c. Client Issues	
7d. Body Language	
7e. Final Activity	
	<small>Added by Bill G. Barker, last edited by Bill G. Barker on Feb 12, 2009 (view change)</small>

[Station 6 – Wiki Screen Shot showing the Influence Gap question]

Lab 3 – Client Negotiations Overview

The Client Negotiations learning lab is the highlight of the entire learning experience. In this lab, the PE will sit down at a conference table in the Executive Client Conference room, to negotiate three client issues regarding the IBM proposal. This session includes up to three peers in an observer role, and well as the actual client role. The design includes:

- A virtual face-to-face client negotiation using headsets for audio sound
- A video recorded session for later replay in a video library
- Video markers to indicate location of “thumbs up or thumbs down” behavior
- Facilitated discussion
- Peer-to-peer feedback after negotiation is concluded
- Limited body poses for communicating
- Best practices skill assessment of the PE by each peer and client.

- After the negotiation, an automated scorecard is displayed that calculates skill results from all attendees. This information is used for a facilitated discussion to capture lessons learned.

7 Best Negotiation Practices	PE	Obsvr 1	Obsvr 2	Obsvr 3	Fac.	Total Score
Facilitate good two-way communication	High (Green)	Med (Yellow)	Med (Yellow)	Med (Yellow)	Med (Yellow)	11
Seek collaboration even if the client does not	High (Green)	High (Green)	High (Green)	High (Green)	High (Green)	15
Draw out and clarify interests, not positions	Med (Yellow)	High (Green)	Med (Yellow)	Med (Yellow)	Low (Red)	10
Generate options for mutual gain	High (Green)	Med (Yellow)	Med (Yellow)	Med (Yellow)	Med (Yellow)	11
Use objective criteria to seek "common ground"	High (Green)	Med (Yellow)	Low (Red)	Med (Yellow)	Low (Red)	09
Acknowledge possible alternatives to reach an agreement	Med (Yellow)	Low (Red)	Low (Red)	Low (Red)	Low (Red)	06
Make commitments with care	Med (Yellow)	Med (Yellow)	Low (Red)	Low (Red)	Low (Red)	07

High (Green = 3pts) Med (Yellow = 2pts) Low (Red = 1pts)

[Lab 3 Screen Shot of Negotiation Room and Scorecard]

Measurable Benefits and Outcomes

This virtual program is new and being deployed as of the time of this writing. Because of our early deployment, the company doesn't have any precise measurable benefits. But, it will be tracking its learning effectiveness and application metrics through its Web survey wizard programs (see sample screen shot below). IBM CLD ran two full pilot programs representing the broad PE community and has received many positive reviews. In addition, it also has provided demo's to multiple non-PE groups, and also has had many positive reviews and encouragement.

This course is designed to track level 1 and level 3 per the table below and we will review the results monthly. IBM CLD also knows there will be several thousands of dollars cost benefit from travel time, air fares, and living expenses from any of the V-learning courses. Not shown in the table below is the company's "learning gain" metric, which is based on before and after results, but it will also be tracked. The company also is reviewing ways to track business impact, such as win rate of successful negotiations of those who have enrolled in this course.

In summary, IBM CLD has all the metrics in place and is awaiting the results from its current deployment plan.

