TALESPIN

CoPilot Designer Authoring Guide



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Table of Contents

Introduction 4

How to Use this Document 4

Discovery and Needs Assessment 6
- Guiding Questions 6
- What is our goal? 6
- Who is the training for? 6
- What do learners need to do? 6
- Why are learners struggling? 6
- Experience Design 7
- Implementation Context 7

Learning Experience Design 8
- Learner Persona 8
- Learning Objectives 9
- Key Learning Points 9
- Skills 11

Experience Breakdown 13
- Structure of the Experience 13

Narrative Design 14
- Scenario Design 14
- Define the Conversation Goal 14
- Character Design 15

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Introduction

CoPilot Designer is a no-code authoring tool for immersive soft skills learning content. CoPilot Designer enables users to author emotionally realistic immersive learning experiences, in which learners engage in role play with virtual human characters. Using a node-based authoring system, CoPilot Designer provides designers and authors with the flexibility to create a wide range of content. Authors have complete control over learning experience design, determining the learning flow and content, and virtual human interactions that are fully customizable, such as voice, gestures, and emotions.

How to Use this Document

Creating a solid foundation and documentation is crucial for any project, and learning experiences are no different. This Authoring Guide and the Experience Requirements Document (ERD) will help you to build that foundation and document your project along the way. The ERD allows you to design your immersive learning experience by defining key aspects like your learning objectives, what skills your learners will practice, and the scenario.



1. Discovery and Needs Assessment: Investigate your organization's needs, goals, and employee knowledge gaps. Explore why you're creating this experience and what your learners need to practice. Narrow in on the goals of the learning experience.

2. Learning Experience Design: Define your learning objectives, key learning points, and skills. This is the cornerstone of making your module successful.

3. Module Breakdown: Define the structure of your module and establish how the scenario conversation will be organized.

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4. Narrative Design: Establish your scenario, conversation goal, and design your character(s). You'll outline your conversation, roleplay, and write scripts. This will make your experience immersive and foster engagement.

5. Scoring: Review dialogue and decision nodes, and assign values representative of the learner's choice within that dialogue sequence

This document, along with the ERD, are intended to be used as a workbook to follow, step by step. By taking the time to set a strong foundation, the immersive learning experience that you create in CoPilot Designer will be engaging and effective for your learners.

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Discovery and Needs Assessment

Use these guiding questions to establish the purpose and goal of your immersive learning experience. These guiding questions should be used as prompts for brainstorming the learning topic, and to define the experience that your learners will have.

Guiding Questions

What is our goal?

- By implementing this learning solution, what is the change you wish to see?
- What does change look like and how do we know it's working (measurable)?
- Are there specific goals or KPIs you're hoping to target with this training?

Who is the training for?

- Who are your learners?
- What's the size of the target audience? How many expected learners?
- What do you hope learners come away with after this experience?

What do learners need to do?

- What are the skills that learners need to practice?
- What specific actions or behaviors do learners need to take to reach the defined goal?
- What does it look like for learners to perform these behaviors successfully?

Why are learners struggling?

- What is blocking your learners from applying these skills now? Think of things like, but not limited to:
    - Knowledge gap
    - Low confidence
    - Low motivation
    - Burnout

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Experience Design

Note: We recommend learners only be in a VR headset for up to 20 minutes at a time

- How many topics do you want to cover?
- How do you envision the sequence of your learning content, following a Pre-assessment, Lesson(s), Post Assessment structure?
    - Pre-Assessment: determine learner's baseline understanding of the subject matter
    - Lesson(s): opportunity to include more instruction-based role play and content, teaching skills
    - Post Assessment: determine learner's progression of skill demonstration by comparing scores to the pre-assessment

Implementation Context

- Where and how will this be used?
- On-site vs. remote
- Mandatory vs. optional
- Stand alone vs. complementary to other instructional training or content
- Frequency of use

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Learning Experience Design

Learning Experience Design is the cornerstone of creating an engaging and effective learning experience. Define your learning objectives, key learning points, and skills. You will use these elements of your Learning Experience Design as the basis for all of your other design decisions while creating your content.

Learner Persona

Learner personas are comprehensive profiles of specific groups in your target audience. Include at least one learner persona, although multiple persona's may be beneficial if you have a large, diverse learner group. Personas help you document your learners':

- Needs
- Goals
- Motivations
- Expectations
- Capabilities

Learner personas set the base for your learning objectives, key learning points, scenario and narrative decisions.

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Learning Objectives

Learning objectives are statements that define the intended outcomes of the learning experience. They define the competencies the learner should possess after completing your content. Learning objectives need to be clear, specific, and measurable.

Creating an immersive experience requires you to define learning objectives. Without clearly defined learning objectives, your content may be entertaining but won't achieve tangible results.

Knowing what learners should be able to know or do after completing training will inform all types of decisions around characters, scenarios, and dialogue. Some key questions to consider are:

- What should learners walk away with after this experience?
- What change do you wish to see (on your team, in your organization, etc)?
- Are there specific goals you'd like your team to reach?
- What KPIs are you hoping this training will improve?

Key Learning Points

Key learning points are learning elements that will be tied to specific decision points in your conversation. Key learning points are specific concepts a learner can demonstrate proficiency in by completing the learning solution.

For a 20 minute immersive learning experience, we recommend including between 5-10 key learning points. Every decision point in your learning experience should be associated with a (new or repeated) key learning point.

Some examples of key learning points are:

- Correctly open the conversation
- Ask open-ended questions to learn more about what's been going well with your client
- Ask open-ended questions to learn more about what hasn't been going well with your client

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- Make reflections to confirm your understanding
- Succinctly summarize the issues at hand
- Provide a menu of solutions to facilitate buy-in
- Restate steps forward

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Skills

Skills represent the specific abilities required to complete a particular task. Now that you've defined your learning objectives and key learning points, you'll be able to tie skills to each of your learner's decisions.

In CoPilot Designer you will be able to assign skills after every decision node by using a scoring node. Because your decision points are tied to key learning points, you'll be able to track if your learner is meeting your learning objectives.

We recommend having 3-5 skills incorporated per 20 minute immersive learning experience. Learners need to have the same amount of opportunities throughout each path to demonstrate your chosen skills, so no matter what path they take, there's an equal opportunity to learn.

To maintain consistency across learning experiences, Talespin has developed a set of skills that you can select from.

- Accommodation
- Accountability
- Active Listening
- Adaptability
- Adherence
- Advocacy
- Affect Reflection
- Analytical Thinking
- Anchoring
- Articulation
- Assertiveness
- Authenticity
- Being Present
- Clarity
- Collaboration
- Commitment
- Encouragement
- Establishing Next Steps
- Evangelism
- Evoking Question
- Flexibility
- Follow Instructions
- Follow Up Question
- Framing
- Goal Setting
- Growth Mindset
- Humility
- Identify Cues
- Impartiality
- Initiative
- Innovation
- Positiveness
- Powerful Questions
- Pragmatism
- Probing Questions
- Problem Solving
- Professionalism
- Psychological Safety
- Public Speaking
- Purposeful Inquiry
- Reading
- Resilience
- Resoluteness
- Resolving Issues
- Respectfulness
- Risk Awareness

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- Compromise
- Conflict Resolution
- Constructive Feedback
- Coordination
- Critical Thinking
- Cultural Intelligence
- Decision Making
- De-Escalation
- Demonstration
- Divergent Thinking
- Empathetic Paraphrase
- Empathy
- Encouragement
- Establishing Next Steps
- Instruction
- Interview
- Logical Reasoning
- Manage Difficult Conversations
- Motivating
- Multitasking
- Natural Paraphrase
- Negotiation
- Non Verbal Communication
- Objectivity
- Observation
- Organization
- Other Awareness
- Patience
- Positive Reinforcement
- Self Confidence
- Self Evaluation
- Self Regulation
- Speaking Succinctly
- Stress Management
- Task Focus
- Time Management
- Trust
- Verbal Communication
- Writing

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Experience Breakdown

Define the structure of your module, the learner's character within the scenario, and how the scenario conversation will be structured.

Structure of the Experience

You are not restricted to covering all of your learning content in a single conversation. Design the learning experience using the structure best fit to fulfilling your learning needs and producing an effective product. CoPilot Designer enables you to create pre-assessment and post-assessment conversations which allow you to capture the learners' baseline performance and measure their learning. CoPilot Designer also allows you to design creative Lessons that familiarize your learners with key concepts. You can utilize lessons to integrate your traditional instructional material into the immersive training, as well as, give learners the opportunity to role play with a virtual human to practice skills.

While you can structure your experience in anyway you want, we recommend using this structure, especially if you're unsure about how to proceed:

1. **Pre-Assessment Conversation:** determines learner's baseline understanding of the subject matter. This conversation should highlight all of your determined skills and key learning points. This is a full branching conversation and can be compared to the post-assessment conversation.

2. **Lesson(s):** provide an opportunity to include more instruction-based role plays and content teaching skills. We recommend including 1-3 lessons depending on the breadth of your content. This is an ungraded conversation and doesn't include any scoring. Lessons can be modular or full branching conversations and is an opportunity to use a virtual human as a coach to give the learner verbal feedback.

3. **Post-Assessment Conversation:** determines learner's progression of skill demonstration by comparing scores with the pre-assessment. This conversation should also highlight all of your determined skills and key learning points, but can vary in content/dialogue compared to the

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Pre-Assessment conversation. After this conversation, a learner will receive a results screen and feedback on the conversation progress. This is also a full branching conversation.

Narrative Design

Scenario Design

Pull up the list of skills you've chosen, and brainstorm examples of scenarios that would require a learner to practice those skills.

Some prompts to help brainstorm are:

- What are real life examples or common situations that you and your team experience?
- What things need to be improved on?
- Where do things go wrong/how should things be instead?
- What are your Key Performance Indicators or other company goals your organization is trying to achieve?
- How are you trying to sell/use/share the experience(s)?

Define the Conversation Goal

The conversation goal is what the learner is trying to accomplish by talking to the virtual human (VH) character.

The conversation goal should support your learning objectives, but is more specifically geared towards your narrative design. It will inform how you write your conversation(s) dialogue and will align with your key learning points.

Examples of a conversation goal:

- Use negotiation skills to close the sale/deal with your client
- Give your co-worker the constructive feedback about how to restore trust on your team
- Terminate your employee without irreparably damaging the professional relationship
- Use motivational interviewing techniques to increase prescription adherence in your patient

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Character Design

Create comprehensive profiles for each of the characters in your experience. By completing the character profile page, you'll have rich, realistic characters that contribute to the immersion and engagement of your learning solution.

Craft a Branching Narrative

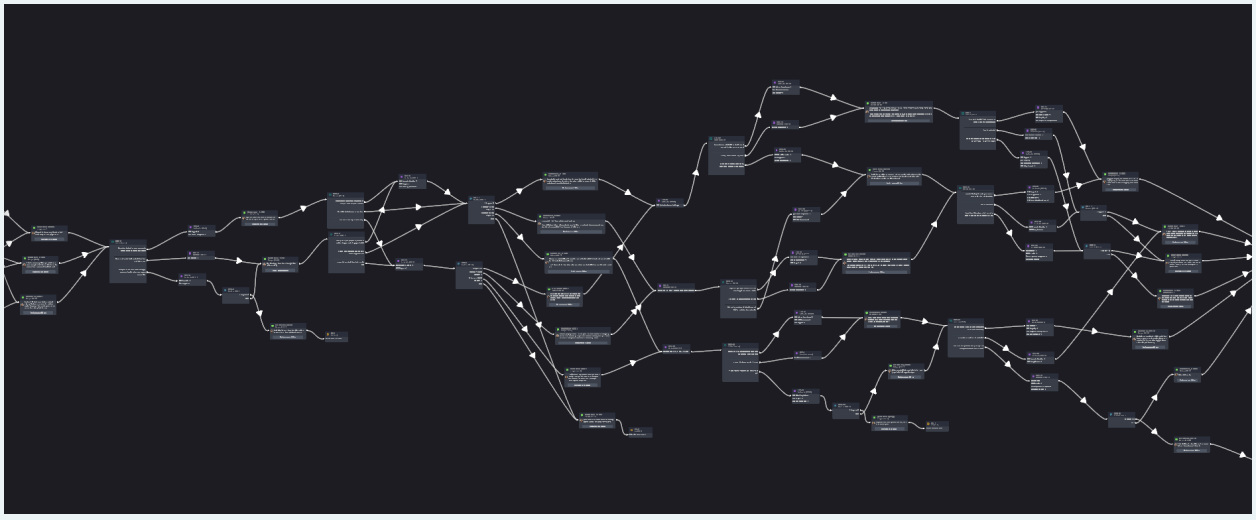
Branching Narrative Structure

Branching narratives give learners the option to make their own choices and decide how to move the virtual conversation along. You might be familiar with create-your-own-adventure stories or basic game design.

Similar to real life, there is no one set way to have a conversation. Branching narratives give you the opportunity to incorporate the best set of choices (the happy path), a middling set of choices/path, and a pitfall set of choices/path.

You don't need to know the full extent of your branching structure yet, but it's a good idea to know how frequently your learner will loop back to your happy path.

This is a realistic example of a narrative branch:



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We recommend you add no more than three branches per decision node. These branches can have unique dialogue nodes, or responses from the Virtual Human character, but should then “loop back” to a previous node, or make sense with the next decision node. The faster you connect back to the happy path decision node, the simpler and more organized your conversation is going to be.

Define the Happy Path

You’re now ready to define your learner’s decision points (Decision Nodes) by tying your Key Learning Points to the beats of your conversation.

Remember, Key Learning Points are specific concepts in which a learner can achieve proficiency by completing the learning solution. Associating them with specific decision points in the conversation defines exactly when the learner has the opportunity to display proficiency.

Before you dive into scripting, you’ll want to outline the beats of your conversation to ensure the learning efficacy of your content. Do this by listing out the highlights of each node:

- Dialogue nodes are what the virtual human character will say to the learner. Dialogue nodes should progress the plot of your narrative or story
- Decision nodes are when your learner has an opportunity to reply or respond to the virtual human character. It’s important that decision nodes align with your key learning points, as decision nodes are the learner’s opportunity to demonstrate skills and competencies

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For more information, visit **TALESPIN.COM**
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