

# Creative Storytelling and Scenario-Based Learning

for Engaging Virtual Training



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Instead of making them feel great and inspired to grow in their roles, I had let these 10 employees down. All that caused me to realize something—that managing is a privilege. You don't have to be a manager to be successful in your career. It is a career choice, a choice that you need to take seriously should you go down that path. As a manager, you have a tremendous amount of impact on your employees' lives. And I needed to take that privilege more seriously.

—PAT WADORS

CHIEF TALENT OFFICER AND CHIEF HUMAN RESOURCES  
OFFICER, SERVICE NOW

*MY DIFFICULT, NO-FUN FIRST FEW YEARS AS A MANAGER*<sup>17</sup>

The venerable Society for Human Resource Management (SHRM), a professional association with over 300,000 members in 165 countries, is on a mission to empower people and workplaces by advancing HR practices and maximizing human potential.

With two highly popular certification programs for professionals in HR, SHRM have identified a new area in which they could have a positive impact on organizations worldwide: **creating a qualification program for new people managers.**

No matter what industry you work in, the transition from individual contributor to people manager can be a painful one. Linda A. Hill, professor and author of *Becoming a Manager*, shares the words of one new branch manager at a securities firm:

“

*Do you know how hard it is to be the boss when you are so out of control? It's hard to verbalize. It's the feeling you get when you have a child. On day X minus 1, you still don't have a child. On day X, all of a sudden you're a mother or a father and you're supposed to know everything there is to know about taking care of a kid.”<sup>18</sup>*

17. <https://learning.linkedin.com/blog/learning-tips/my-difficult--no-fun-first-few-years-as-a-manager>

18. <https://hbr.org/2007/01/becoming-the-boss>



In many organizations, training, coaching, and mentoring resources are limited or unavailable, leading to a sink-or-swim situation for new managers, putting them at risk of alienating their team members, feeling unprepared, and negatively impacting productivity.

SHRM wanted to change all that by creating a best-in-class learning program that teaches new people managers how to overcome the challenges they face. To reach an international audience of managers working in every industry, the training needed to be virtual.

What SHRM didn't want was a "Click Next" experience that got them to the assessment. **The team wanted a robust, highly engaging program that would speak authentically to an audience consisting primarily of millennials.** After an extensive RFP process, SHRM chose SweetRush to partner with them on this journey, and the SweetRush team was more than up for the challenge—excited to create an exceptionally creative and engaging program for SHRM.

What happened next was a little bit meta—a story of friends working and collaborating together and supporting each other inside the virtual training, and a parallel story of collaborators (who became friends) creating the actual virtual training.

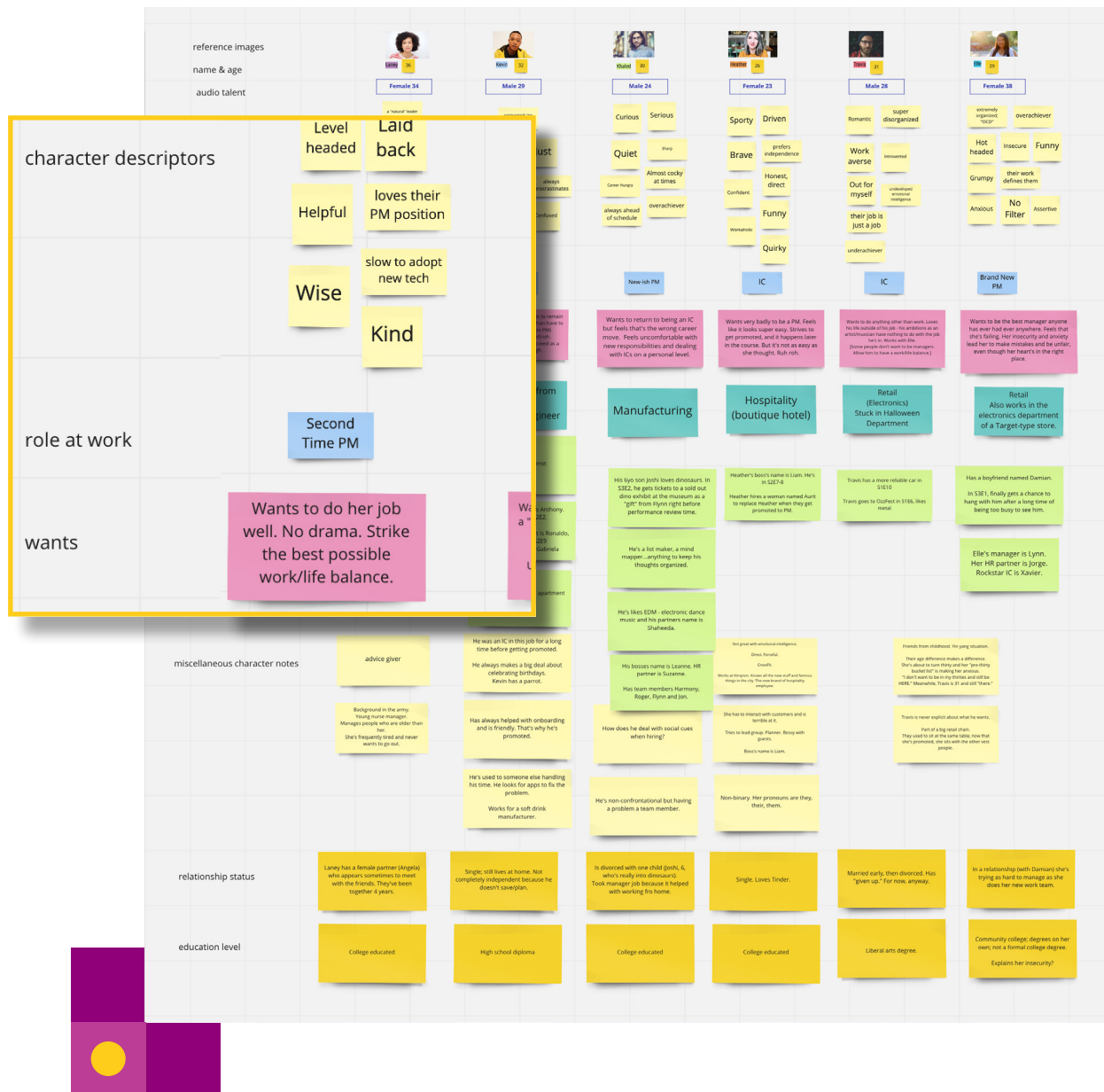
## Six Friends Meet in a Coffee Shop...

### Haven't I Heard this Story Before?

Effective people management is a combination of skills and behaviors, and SHRM identified **27 performance objectives and 110 behavioral indicators** for the program, which would ultimately be put to the test via assessments.

The combined SHRM and SweetRush team knew from the get-go that storytelling needed to be part of the solution. Particularly in the assessment, SHRM wanted to put learners in real-world situations and evaluate if they met the qualification criteria. It shouldn't be easy and it needed to feel as real as possible.

Early brainstorming meetings hit on an idea with potential: What if the program followed six friends who are all new managers, meeting up at a coffee shop, sharing their experiences, and helping each other? The team was game to explore the idea, but not everyone was sold on it.



**The biggest challenge that I had was in the beginning—the idea of six friends. I thought, “it’s been done before.” You cannot turn on the TV and not see an episode of something being done in a similar way. How are we gonna make this work?**

**—Hernan Muñoz, SweetRush Creative Director**

The team started with a blank (virtual) whiteboard and focused on the character stories. Detailed backstories started going up on the wall: life experiences, work history and industry, personality traits, goals and desires, likes and dislikes, ethnicity, gender identity, sexual orientation, and abilities and disabilities. Two characters seem too much alike? Change the stories so they are more diverse.



**We workshopped the characters. One of the exercises we did was just throwing out adjectives and attaching them to a character. Then we thought, what’s the opposite of that adjective, and who embodies that trait? Every character came to life with qualities and flaws.**

**—Hernan Muñoz, SweetRush Creative Director**

The six friends and their stories were beginning to take shape. The original scope included photo-based avatars, but the team wasn’t having much luck finding enough variety of stock photos to cover 10 hours of virtual training. And the SHRM team’s vision was for these characters to be funky, trendy, and cool—representative of the millennial audience.





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Bringing these individuals to life meant a major change in direction—from photos to illustration. The characters mapped out had diverse body types, races, ethnicities, and abilities: all different people in all different environments. Many iterations were needed to get these characters where they needed to be, but they began to jump off the page. Tattoos, piercings, creative hair color—these details brought personality and individuality to the cast of characters.



*Often when I'm drawing characters, it's like fiction—you're not representing someone in a very specific way. But with SHRM PMQ, these characters are alive. Early on, I realized, "Oh, they really want to do this. They want to create real people." And when I heard their voices, that made it even more real.*

—Jonathan (Jonas) Ramirez, SweetRush Illustrator

As Jonas says, another key to bringing the characters to life were the voiceovers. The script and dialog needed to be great, but the voiceover actors needed to make sure the humor landed, the disappointment and confusion came through, and the camaraderie of the friends was palpable.

Including supporting characters—family, coworkers, friends of the friends, mentors, and even a pet parrot and a UPS worker—40 different characters were created for the program.



**Travis** would love to be making it as a full-time musician. Unfortunately, his retail job isn't getting him much closer to achieving that end, and he'll be the first to admit that he's a little resentful of his job for that reason.

**Gender:** Male  
**Pronouns:** He/him  
**Age at start of show:** 31  
**Occupation:** An individual contributor at a large retail chain  
**Relationship Status:** Divorced  
**Education:** Bachelor of Arts



**Elle** has just been made a manager. And it's about freaking time. After a couple of years of not knowing where she was headed with her job, or her future, Elle saw her 30s barreling toward her and decided to put her mind toward being made a manager. And after a lot of hard work, her determination paid off.

**Gender:** Female  
**Pronouns:** She/her  
**Age at start of show:** 29  
**Occupation:** New manager at a large retail chain  
**Relationship Status:** Has a boyfriend, Damian  
**Education:** Some college

**Heather**'s the youngest member of the SHRM PMQ friend group and probably one of the most energetic.

**Gender:** Nonbinary  
**Pronouns:** They  
**Age at start of show:** 26  
**Occupation:** Front of house individual contributor at a boutique hotel  
**Relationship Status:** Single  
**Education:** Bachelor of Arts



**Khaled** has had a roller coaster year: first a divorce, and now a promotion. But he's coming into his own at his new job, and he's working hard on his relationship with his 6-year-old son, Joshi.

**Gender:** Male  
**Pronouns:** He/him  
**Age at start of show:** 30  
**Occupation:** Team manager at a soft drink manufacturing company  
**Relationship Status:** Divorced  
**Education:** High school diploma

Number one, **Laney** wants to be a great nurse manager. Number two, Laney wants no drama. Number three, if all this could happen with minimal reliance on computers, phones, social media, etc., that would be great, please and thank you.

**Gender:** Female  
**Pronouns:** She/her  
**Age at start of show:** 36  
**Occupation:** Nurse manager  
**Relationship Status:** Has a committed partner, Angela  
**Education:** Bachelor of Science

Only recently promoted to manager at the start of SHRM's PMQ, **Kevin** says one of his main goals at work is to have fun. And do a good job. But also have fun.

**Gender:** Male  
**Pronouns:** He/him  
**Age at start of show:** 32  
**Occupation:** Software engineer  
**Pets:** gary (parrot)  
**Relationship Status:** Single  
**Education:** Bachelor of Science



# The Daily Grind:

## Season 1, Episode 1, Scene 1, Take 1

The first rule of storytelling in learning programs is to make sure your stories are relevant and relatable for the audience. Speaking authentically to the audience is critical—if you're trying to capture and retain their attention and the story doesn't click, you'll lose them.

People in their first management positions are typically in their late 20s or their 30s. They're moving into the next stage of their careers, and, more often than not, they've had no formal training in people management. There are 12 million people managers in the United States, and 42% of them were elevated to their positions based on their performance as individual contributors—but they still have a lot to learn to be strong managers.

Empathy interviews helped the team see this topic through the eyes of the audience and understand their desires and preferences for learning. But the team also asked questions about how the audience consumes information and entertainment outside of learning...which eventually led to an interesting idea:



What if, instead of modules and lessons, the program was presented as seasons and episodes?

Suddenly the concept tied together—each episode features a story related into one of the core topics in the program, “starring” one of the friends. Other friends and supporting characters help round out the story. Each episode would have all the story elements and a standard plot structure, presented through a variety of activities. And just like any good entertainment series, the goal was to make it **totally binge-worthy**.



*We created something like a writer's room. Our whiteboard tracked the topics for each episode, and we lined those up with the “story beats” so we could see how both track over the entirety of the program. We had a lot of latitude and creative freedom; it's definitely been one of my favorite projects to work on.*

—Donald Harrison, SweetRush Instructional Designer



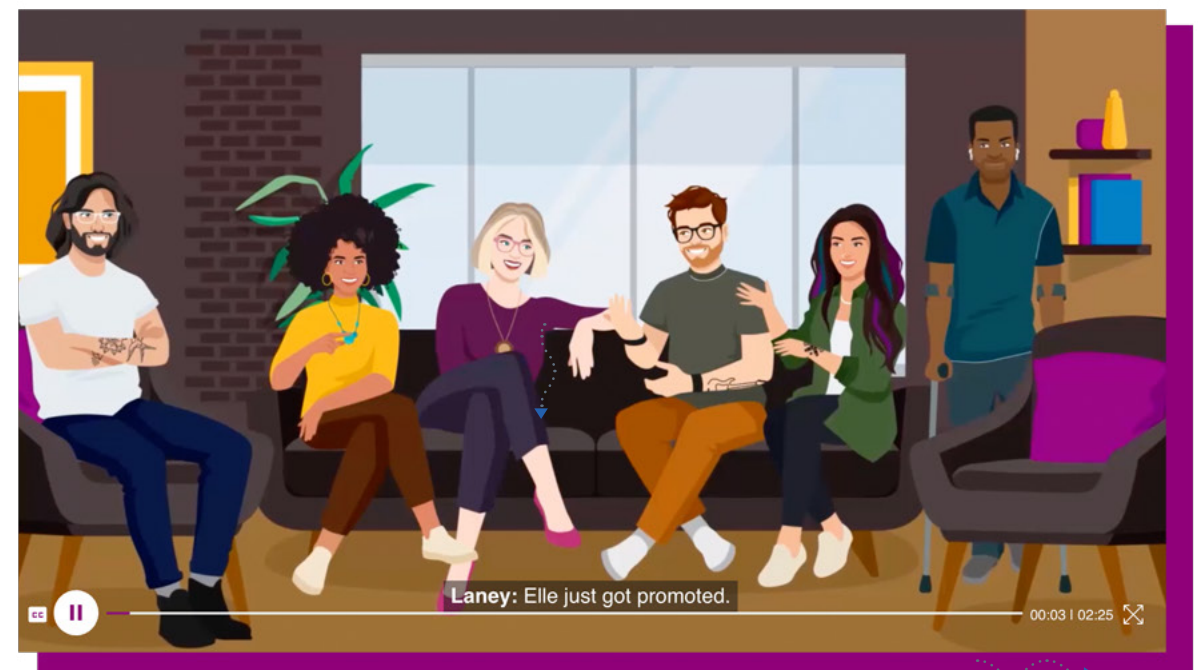


Let's see how this all plays out in

## Season 1, Episode 1: **The Promotion.**

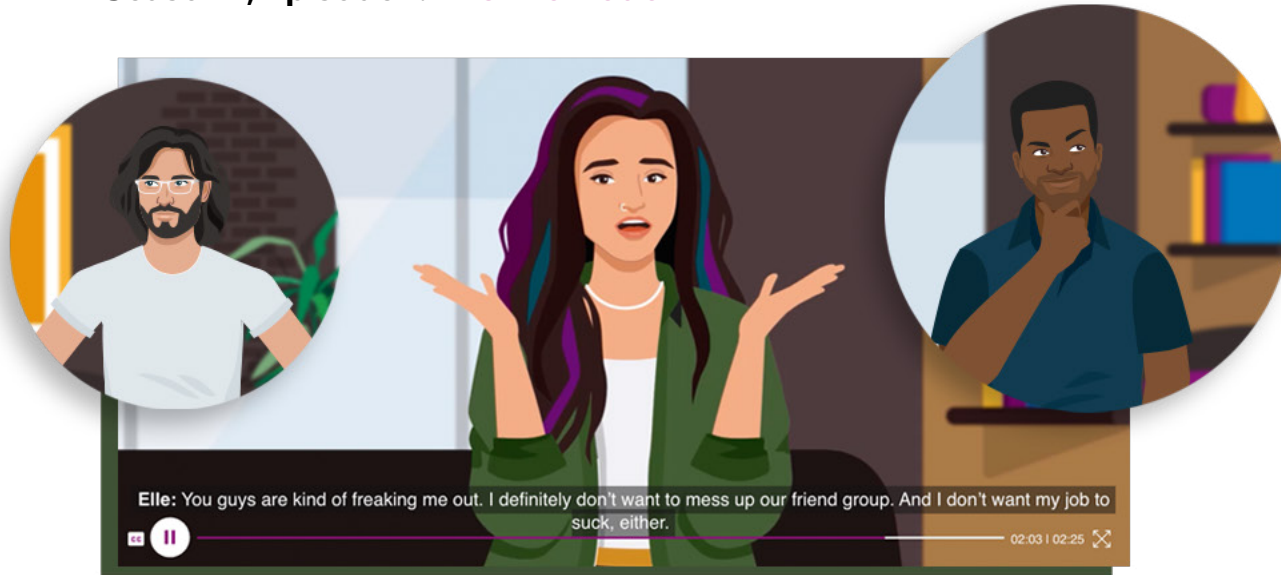


Welcome to The Daily Grind!

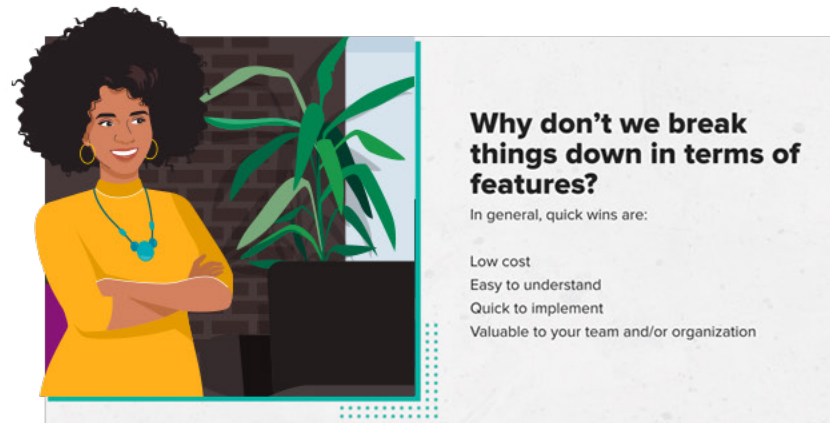


And here are our six friends gathered at their favorite spot.  
Elle has a big announcement: she just got promoted!



Season 1, Episode 1: **The Promotion**

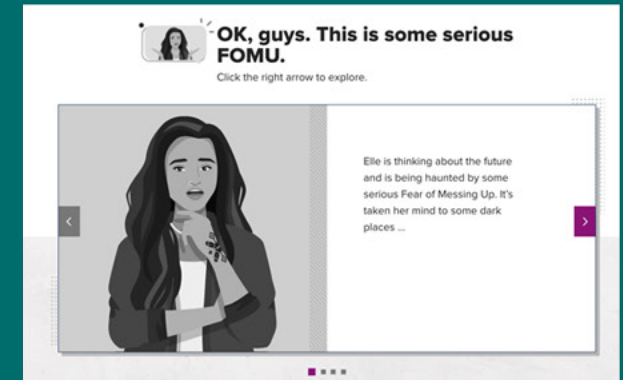
Elle listens to her friends' reactions and is starting to feel **FOMU** (Fear of Messing Up)



Luckily Laney steps in with some sage advice about **achieving quick and early wins** (and introduces the performance objective for this episode).



## FOMU: Fear of Messing Up



Another storytelling device the team created is “FOMU”—inspired, of course by “FOMO” (Fear of Missing Out), FOMU is the Fear of Messing Up. Let’s have our ID Donald explain FOMU.



*We wanted the friends to experience challenges, but we didn't want to have things go wrong in a really big way as part of the episode's main storyline. At the same time, however, when you're writing a course on management, you need the learner to know what happens when things do go wrong. So we came up with FOMU. It's like a black-and-white version of the world where you're outside the story, in a parallel universe where things go really wrong. And then you come back to the technicolor world in which none of those things actually happened.*

—Donald Harrison, SweetRush Instructional Designer

## Season 1, Episode 1: **The Promotion**



**Cool. Can anyone give me an example?**

Click each **PLAY** button below.



And the other friends step up and share some great examples of quick wins.



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**Hey! What would you do?**

Think about your own place of work. No matter what your role is right now, **think like a people manager**. Use these strategies above to identify a couple different quick win opportunities.

In the space below, describe the first quick win you'd try to accomplish at your workplace, then click **SUBMIT**.

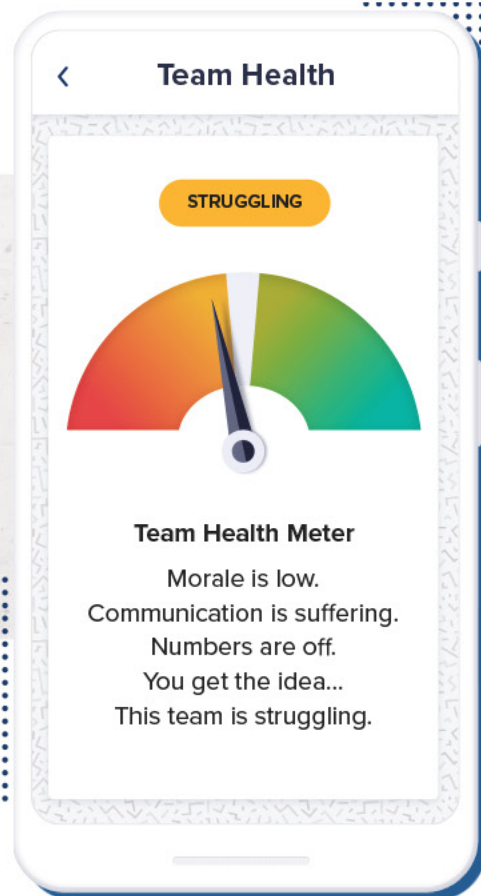
Enter your response here.

**SUBMIT**

Time for a little self-reflection! What are some quick-win opportunities at your workplace? (Activities like this help the audience process what they're learning to make the connection to their own work.)

Season 1, Episode 1: **The Promotion**

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## Health Meter:

The Better Workplaces App

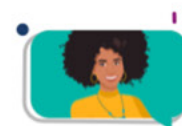


**Looks like I've got some work to do.**

How's Elle doing with her quick win initiative? Fortunately, her friend Kevin has created the Better Workplaces App, so she can gather feedback from her team and see how she's doing. (Not well at the moment.) The Health Meter offers a great storytelling device—and becomes a functional meter in the assessments, but we'll get to that in a bit.

### What Learners Say

*"I think that probably the best thing about the course is that it reminds [us] that people management is not an easy task and not just a natural ability but something that requires hard work."*



**Don't worry, Elle. This is going to be so great.**

Just remember to relax and keep these things in mind moving forward.



Quick wins boost your team's confidence in you, your boss' confidence in the decision to promote you and, most importantly, your confidence in yourself.



If you're searching for a quick-win idea, remember to look for confusion, brainstorm solutions, listen and learn, and think strategically.

Like the song says, "I'll be there for you..." and the friends are definitely there for Elle, giving her—and, by proxy, the learner—some encouragement and summarizing of the key points from the episode.

### What Learners Say

*"I thought the animation and character development made Season 1 interesting! I didn't even realize I was learning so much as I was going through the episodes."*



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# "Heather Wouldn't Listen to a Podcast!"

Now it was time to get to work. **The team had three seasons and 28 episodes to write—10 hours of elearning (!), assessments at the end of each season, and the series finale—to round out the qualification program.** It was a massive effort, fueled by the SHRM-SweetRush creative partnership.

On the SHRM team, Jennifer Currence, SPHR, SHRM-SCP, was inspired and worked brilliantly to provide subject matter content for each episode, along with bits of creative flair that inspired the SweetRush team. "She essentially wrote a book on people management," says Donald. Lead Instructional Designer Andy LaPage adds, "Jen felt like a full member of our ID team. She was incredibly responsive." SweetRush IDs would then take Jen's content and write the episode's story and dialogue.

**To be real and believable, the characters needed to change as the seasons and episodes progressed, just as the learners are gaining knowledge and changing.** With full creative license, SweetRush IDs brought their own flavor to each episode. But just like a multi-season TV show, there needed to be continuity police. (Tattoo QA—checking for consistent look and placement—became an actual job.)



*The team got really invested in the characters. At one point, I suggested that Heather might listen to a podcast in one episode. Our Illustrator and Art Director were shocked. "Why would we have Heather listen to a podcast? They would never listen to a podcast. They would follow an influencer on Instagram, but they would not listen to podcasts." I knew then that the team was truly invested and had this well in hand.*

—Hernan Muñoz, SweetRush Creative Director

Everyone in the design team developed a soft spot for a particular character, and in each episode starring that character, new details emerged. You see their living situations. You meet family members and mentors. They were weird, they had flaws, and that made it fun for the team—and ultimately, fun for the learner.



*It was very important to SHRM that learners are able to see growth in the characters—as professionals but also personally. Heather comes to mind—they start off a little immature, a bit of a hothead. They have a "Bridezilla" moment with somebody at their hotel, where they work. But through the course and through their journey, they learn about emotional intelligence.*

—Andrew LaPage, SweetRush Instructional Designer

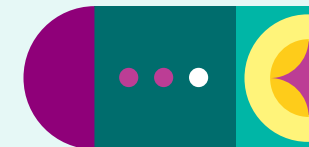


## INSIGHT

# How Not to Lose a Learner: Keeping It Fresh Over 10 Hours of Virtual Training



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Let's face it—you won't become a qualified people manager in a one- or two-hour virtual training course. SHRM PMQ is an in-depth learning program that is designed to teach critical skills for effective communication, performance management, team leadership, and situational judgment.

How do you keep learners engaged over multiple hours of training? Here are three ways the SHRM-SweetRush team accomplished this in the PMQ program.

### ► Create story arcs that span across courses.

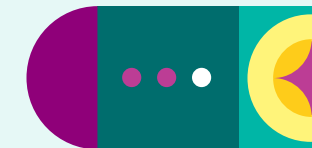
What makes you click on the next episode of your latest Netflix binge, when you know you should really go to bed? You've got to know what happens! The season-episode structure of PMQ lent itself to a similar treatment.



For example, in Episode 1 we find out that Elle and Travis are longtime friends and coworkers, and since she's the younger of the two, he's a little put out that she's been promoted before him. In later episodes, we revisit the Elle and Travis story and see them struggle with their power dynamic at work. How will it affect their friendship—and the group of friends—if the situation escalates? You have to keep watching to find out!



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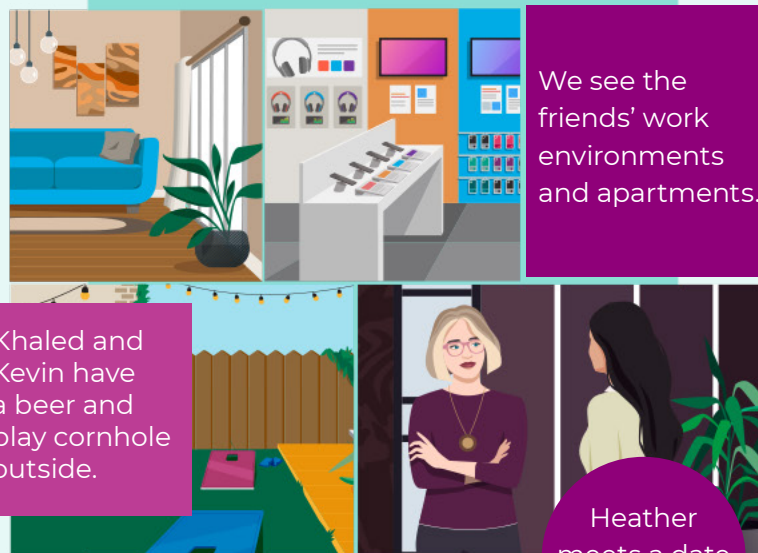


### ► Introduce new supporting characters and locations.

The six friends aren't the only players in the mix—in each episode we expand the “world” of PMQ by introducing new characters. Family and friends, coworkers, mentors, and more, support each episode's storyline, providing new challenges or giving advice to the main characters. The supporting characters provide another opportunity to increase representation in the program, and care is given to make them individuals in their own right. Who knows, maybe they'll go on to be the stars of the next qualification program!



Another technique the team used—again inspired by long-running TV shows—was to show the characters in new locations.



We see the friends' work environments and apartments.

Khaled and Kevin have a beer and play cornhole outside.

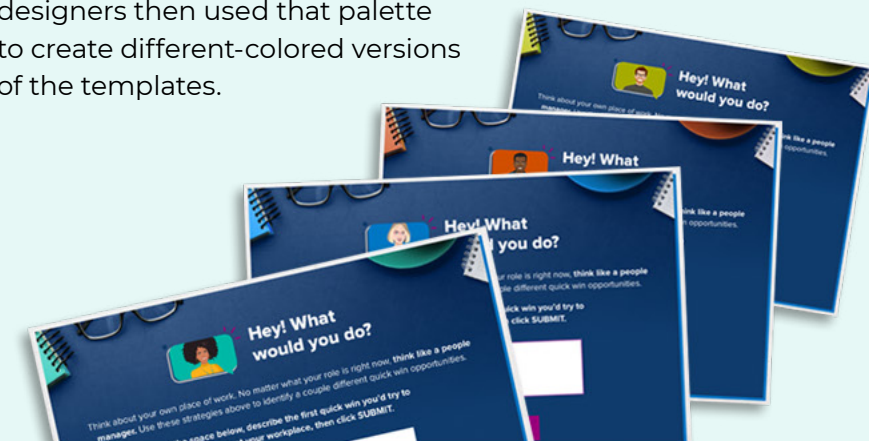
Heather meets a date at a bar.

New locations (often inspired by Pinterest) serve to keep visuals fresh and learners engaged.

### ► Use graphic design techniques to add variety.

In the development of a 10-hour learning program, templates are essential to keep production fast and efficient. Leveraging your library while also injecting some variation to keep things interesting is the sweet spot of graphic design.

Since the illustrators had already defined a color palette for each character, the graphic designers then used that palette to create different-colored versions of the templates.



Each episode features one of the friends as the “lead” character in the story—and every interactive component in that episode features the character's colors. This adds variety to the look and feel of each episode, and it also orients the learner to who the focus is on for the episode.



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# Giving Assessments a Storyline

With the characters, storytelling flow, and graphic assets in development for our bingeable seasons and episodes, the team worked in parallel on the assessment strategy. **The stakes were high—after all, SHRM was putting its brand on this qualification program, and the organization wanted to ensure that learners truly earned and achieved the qualifications upon completing the program.** Recall, that's assessing 27 performance objectives and 110 behavioral indicators!

**"We worked with our psychometrician, Barbara, to create the scenarios in the assessments. She suggested the "setup," and then one of our IDs wrote the scenario. Then, Barbara ensured that the objectives and indicators mapped to the scenario questions.**

—Andrew LaPage, SweetRush Instructional Designer

The team knew it wanted to align the assessments with the great work that was being done in the episodes—but the episodic format created a complication. Would the assessment be like a season finale? What if learners decided to skip or delay taking the assessment and moved on to the next season? Would they lose the thread of the story?

They decided to make the assessment stand alone instead of serving as a continuation of the six friends story. The assessments present the learner with multiple interactive scenarios that take place in the same environments as the main "show" (Elle's retail store, Lainey's clinic, Heather's hotel).

But now, the learner is *in* the story as a friend or coworker of one of the main characters. **Learners see a scenario play out and must provide advice and suggestions to the character on which actions would create the best outcome.**

**Let's take a look at some of Scenario 1.** No cheating, though—we're not giving away any answers!

Scenario 1: Welcome to the jungle

Congratulations! You've just been promoted to manager at Elle's store, overseeing a staff of four: Kirsten, Jerry, Efrain, and Craig.

You probably have a lot of questions, but don't worry—you'll be able to lean on the other managers, including Elle, Mario, Preeti, and Hermès, for advice.

Scroll down to begin the scenario.

Welcome to the jungle! You've just been promoted!

## Assessment, Scenario 1



### Reading minds

Oh, you can, too? Then what are your team members thinking right now? What does your promotion mean for them? Click on each direct report to read his or her mind.



First, let's find out what your team members are thinking about you—seems they've got some opinions on who your old work should go to, now that you're the manager.

### So, how are you going to handle it?

Choose the best answer.

- ☐ I will ask the team what they can take on, and delegate from there.
- ☐ If I extend my deadlines, there is time for it all.
- ☐ I am a manager now. Time to delegate based on what I think my team's strengths and weaknesses are.
- ☐ Keep my old tasks. It is not fair to pawn off all my work on others.

SUBMIT

How **are** you going to handle it?



## Assessment, Scenario 1



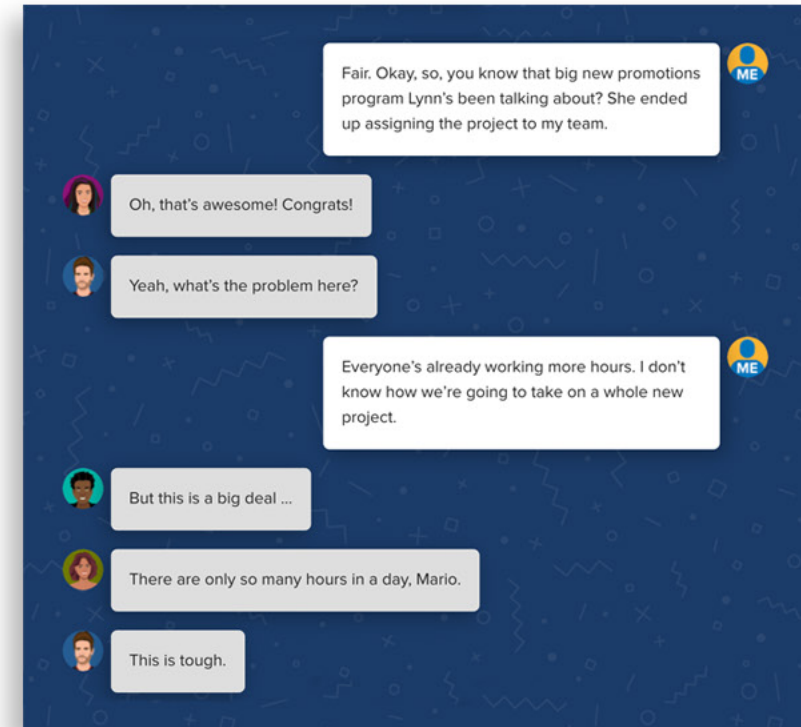
Oh, look. Here come two of your team members.



Bummer, looks like there's a problem with some work you've delegated.

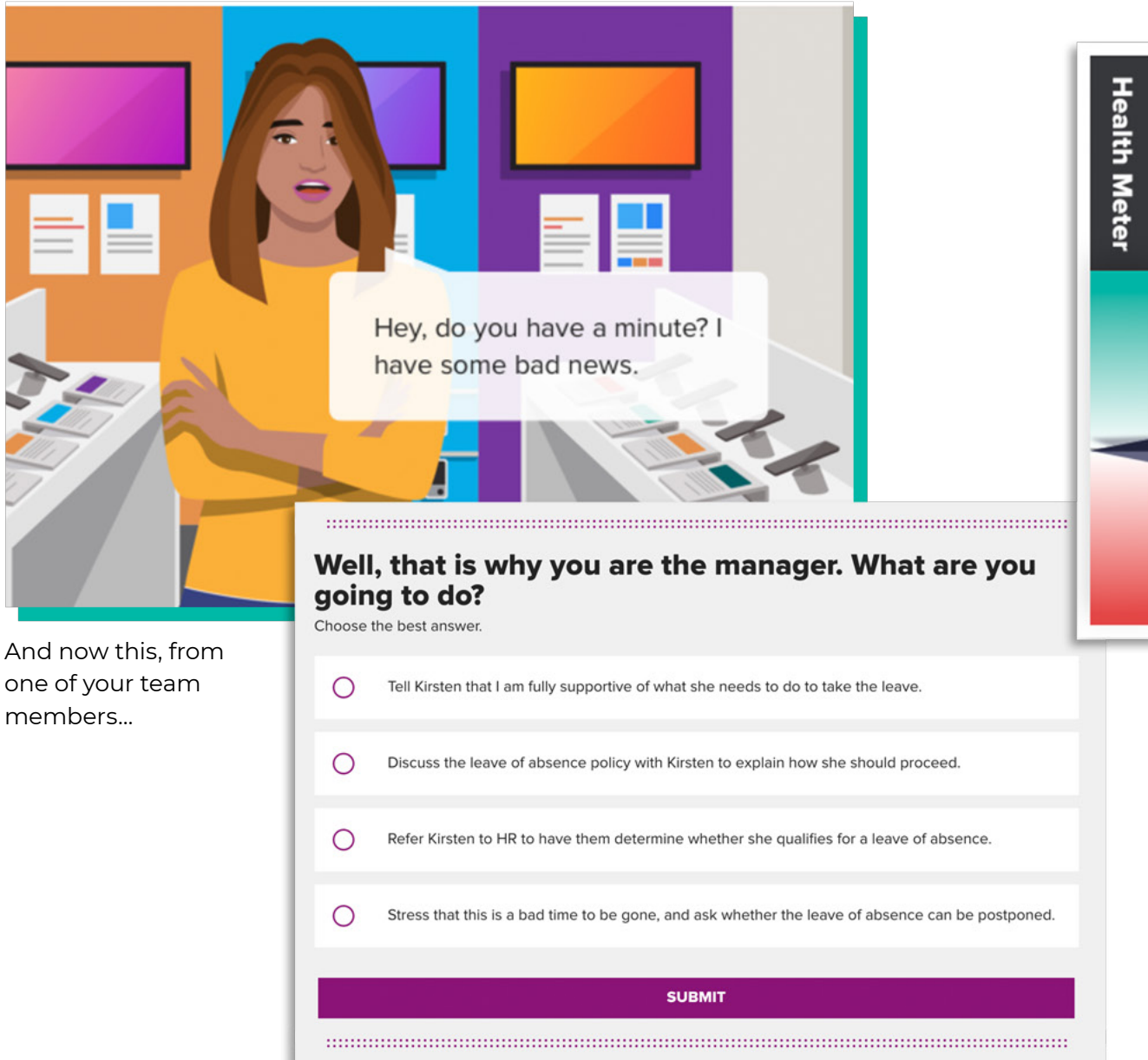
### What Learners Say

*"There were many concepts I became aware of, that got me questioning how I currently manage my team and how I could manage and communicate with them well."*



And now your boss has given you a big, new opportunity.  
Can your team handle it?

## Assessment, Scenario 1



Hey, do you have a minute? I have some bad news.

**Well, that is why you are the manager. What are you going to do?**

Choose the best answer.

- ☐ Tell Kirsten that I am fully supportive of what she needs to do to take the leave.
- ☐ Discuss the leave of absence policy with Kirsten to explain how she should proceed.
- ☐ Refer Kirsten to HR to have them determine whether she qualifies for a leave of absence.
- ☐ Stress that this is a bad time to be gone, and ask whether the leave of absence can be postponed.

**SUBMIT**

Health Meter

And now this, from one of your team members...



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### The Return of the Health Meter

The Health Meter also comes back into play during the assessments. During the episodes, it's used as more of a storytelling device, helping the characters see where they stand with their team and how their actions create consequences.

**Now, during the assessment, the Health Meter becomes the learner's measurement of how well they are doing in the assessment scenario.** Make the right choices and the meter goes up; make the wrong choices and it goes down.

At the end of the scenarios, learners see their full results and get feedback and remediation, so they can study up on the areas they missed and, if needed, take the assessment again.



### What Learners Say

*"I found this program to be easy to navigate and follow. While (I was) completing this PMQ program over the course of several weeks, the technology always knew where I was and was helpful. I enjoyed the health meter on the side of each test."*



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# A Learning Program That's Actually Binge-Worthy

Put together, the SHRM People Manager Qualification program includes over 10 hours of virtual training. **It's tied together with an overarching storyline, yet each episode brings new challenges, fresh perspectives, and personal and professional growth in characters that learners come to love.** This is virtual training as we all hope it can be: effective and yet entertaining—or, as we like to say, binge worthy!

Finish one episode and you immediately want to know what challenges will face the friends in the next one. Will Khaled find his footing with his team? Will Laney have to face some drama? *Will Travis get fired?!?*

**” Ultimately, this was an incredible team effort with SHRM and SweetRush, and what made it successful was the work we did upfront to get into the heads of the learners. We sought to understand how they consume education and entertainment, and the end product is a great execution of that combination.**

—Andrew LaPage, SweetRush Instructional Designer

The need for effective people management training is real. According to SHRM, one in three workers say their manager can't lead a team, and 28% of HR professionals' time is spent addressing problems caused by poor people managers.<sup>19</sup>

**The People Manager Qualification program is here to fill that need, and the response so far has been outstanding.**



## What Learners Say

**“The content was REAL! It was almost as if someone was watching my life and creating content from it. The information learnt is timely, useful, and applicable.”**

<sup>19</sup> <https://www.shrm.org/pmq>

## INSIGHT

# Why Has Storytelling Become So Popular in Virtual Training?



What was your favorite story as a child? You probably didn't need to think very long or hard about that question; cherished stories stay with us for a lifetime. (Mine was *The Magic Faraway Tree*.) Perhaps you have even shared some of your favorite childhood stories with your own children or loved ones?



We have been telling stories for thousands of years. From our humble beginnings of sitting around a campfire and telling tales of our ancestors, to the current pastime of gathering with our “friends” to binge-watch a new series, we are both the creators and consumers of stories that inform, entertain, and connect us.

We've been telling them for many different reasons, too. From the cautionary tales of morality like Aesop's famous fables, to the entertaining tales of tragedy and comedy courtesy of the Bard, and cultural tales, passed on through generations of hunter-gatherers, that foster social cooperation and teach social norms.





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It's no surprise, then, that storytelling has a role to play in learning. Here are some of the benefits we see to telling stories and using story-based scenarios in your programs:

► **They Build Empathy**

Character-based storytelling can build empathy and help learners connect with the content in a way that is more meaningful, particularly when emotions are brought into play. When creating characters, be sure to make them as authentic and “real” as possible. Take time to think through your cast of characters and their backstories, and avoid stereotypes and caricatures at all costs.

► **They Provide Safety to Try (and Fail)**

Story-based scenarios and activities—specifically those that closely mirror the learner's workplace—enable learners to apply their knowledge and skills in a safe way. Learners are more likely to take risks and give things a try (even if they are not completely sure their experiment is the right approach) knowing that “failure” is an option—provided they learn from it, of course. When designing story/scenario-based activities, be sure to develop feedback that helps educate and inform learners on each of their choices—even the correct ones!

► **They Provide Context and Remove Uncertainty**

Storytelling and scenario-based learning are great tools for providing context and helping learners prepare for the unknown. When writing narrative for this purpose, think about how you sequence things and try to base your storytelling on what the learner can expect to experience when back in the workplace.

► **They Engage and Motivate**

Stories have the ability to make content more interesting and engaging—engaging content is motivating, and a learner's ability to navigate or sort through complex or difficult material is, in some part, determined by motivation. The more we can do to increase motivation, the greater the chance the learner will succeed. You can build motivation in your stories by creating true-to-life scenarios and stories that challenge the learner and that ideally evoke an emotional response.



# Key Takeaways

- 1 Storytelling and story-based scenarios are proven techniques to engage and motivate learners.** They help build empathy, provide a safe place to practice, provide context, and remove uncertainty.
- 2** If you're looking to use storytelling as an instructional design technique, it's imperative that you understand your learners. **Talk to the specific group you're designing for.** Empathy interviews are a great way to tease out their learning preferences, find out what stories and style/tone will resonate, and get inspired. ([Read more in Chapter 2!](#))
- 3 To achieve a great end product, client-vendor partnership and collaboration can not be understated.** SHRM committed and delivered at every turn, and so did SweetRush. Teamwork makes the dream work.
- 4 Latitude and creative freedom can empower and motivate individuals to produce their best work.** Successful storytelling requires imagination, and giving teams that space can lead to amazing results.

## Raise Engagement to New Heights

with SweetRush's Award-Winning Custom Learning Team

We're proud to be recognized by our peers in the industry.



**119 Brandon Hall Group Awards**  
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**eLearning Industry**  
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