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# Leasing Setup Preview

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# Leasing Setup Preview

## A Professional Certification Module for Entrata Software

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## Purpose

I designed and developed one module for a professional certification that is being created for companies that use Entrata software. My project, titled Setup Preview, is the first/introductory module for Entrata's Leasing Setup Certification. The certification will ultimately include seven modules total. Because my project is one piece of a bigger product, certain sections of this report will focus solely on the introductory module (i.e. timeline, budget, course overview), while others will include certification context, as well (i.e. environment analysis, instructional strategy, etc.).

The overall purpose of the certification is to provide users with a comprehensive overview of Entrata settings and permissions related to the lead-to-lease process. These customizable settings and permissions allow companies to personalize their Entrata experience to best align with their processes and preferences. The Setup Preview module (my project's introductory module), in particular, is intended to define key terminology for learners, and orient them to what they will encounter throughout the rest of the learning experience.

Entrata sponsored this project with a goal to help clients use Entrata to its best potential, and in a personalized way that aligns with their already-existing workflows. Entrata's vast amount of settings and permissions makes this customization possible. Being educated on the settings and permissions that exist, as well as the automation options that fall under these same categories, will help clients realize that Entrata is a software that they don't want to work without. This certification program provides two distinct advantages to the company.

1. It will be an additional revenue stream as companies look to increase their knowledge of the Entrata system.
2. It provides an alternative to the traditional in-person/live-remote training experiences currently being offered.

The overall goal of the certification is to help learners more fully and competently customize their Entrata experience related to the lead-to-lease process. The goal of the Setup Preview module, in particular, is to provide foundational context by introducing learners to the fundamentals that allow them to set up and customize their team's Entrata experience. By the end of this module, learners will be able to:

1. Distinguish between permissions and settings.
2. Define and locate access parameters.
3. Navigate to company settings and property settings.
4. Use the Property Settings Validation Report to compare property settings.
5. Set up task priorities and create corresponding rule sets.

## Project Needs

The project is intended to address specific learner needs and stakeholder needs. A learner analysis was completed to grasp the needs from the learner's perspective. An environment analysis looked at the stakeholder's perspective, and how precedent can guide this project.

## Learner Analysis

To better understand my learners, I talked to stakeholders about their target audience, and looked at client details available to me. To generate accurate personas, I also gathered information via surveys and interviews with our beta users. Some questions I asked were:

- What is your role at your current company?
- How long have you been using Entrata?
- How would you rate your Entrata knowledge? (scaling question)
- What do you do if you have a question about Entrata functionality?
- What kind of Entrata training have you participated in?

The majority of clients I surveyed rated their Entrata knowledge between an 8-10 out of 10. These were the more expert administrative users that the certification was aimed at, and so their responses to the other questions weighed heavily as we created two distinct personas. In my interviews, I tried to gather as much information as I could about the Entrata training they had already participated in and what their likes/dislikes were about those experiences. This later informed my environment analysis as I discussed with stakeholders what could make the certification training content distinct.

Ultimately, my personas represented the administrative users the certification was being made for. These users are often considered the "Entrata experts" at their companies. Administrative users range from a company's System Support Specialist to their Property Operations Coordinator. As such, we have a broader learner profile because there is no one job description for all of our learners. Despite the variety of job titles/descriptions, these learners have all been in the property management space for years, and are familiar with other property management softwares (Entrata's competitors). Often these administrative users are the ones determining if and how a company uses Entrata.

Entrata's customization is discussed with administrators when companies first start using the software. But often, settings/permissions are set by a trainer during this initial phase based on the company's current workflows. This limits the exploration of how different settings function, and administrators often don't realize how using Entrata in a slightly different way could improve their workflows. Administrators admit that it isn't always ideal to change workflows during initial implementation of Entrata. Instead, it's better to get a handle on the system first, and *then* explore more fully the customization Entrata has to offer. But at that point, they don't remember what is customizable and what is not. Plus, they don't want to make any setup changes that could compromise their processes.

In sum, these administrative users need a learning experience that allows them to explore and be reminded of the different customization options after they have been using the system for a while. They also need to be able to play around with these different settings and permissions to see how it affects workflows without compromising how their company and properties are currently operating.

## Environment Analysis

***Stakeholders***
Creating a certification program has recently become a priority of Entrata's training department. This will provide an additional revenue stream and open up learning opportunities for Entrata clients. This is the number one priority of the stakeholders.

One challenge for the certification team is to make sure that this training is different from the free training resources already provided to Entrata clients. Because Entrata will be charging for access to the certification content, it needs to go above and beyond what the pre-existing instructional materials do. Currently, Entrata offers help and support articles and videos that guide learners on different Entrata processes. Any Entrata user can search the help and support library to find information related to a topic of interest. Because this content already exists in front of a paywall, the certification team is expected to be more comprehensive in the material presented and the certification content will be curated in a more intentional way that follows (in this case) the leasing workflows from start to finish.

***Precedent***
The decision to focus on specific workflows came from looking at the success of other certification programs. These programs (like the one Salesforce offers) include multiple certifications with different emphases. There is a different level of appeal to certifications based on an individual's role. Entrata's certification program intends to follow this same pattern. The first certification being tackled is the Leasing Certification. As mentioned, this will follow the leasing process from beginning to end. Future certifications will focus on different aspects of the Entrata platform, like Residents, Marketing, and Accounting.

In looking at successful certifications programs, I also learned that - when done right - a certification can carry weight when it comes to career advancement. For instance, Salesforce certified employees/job applicants are in high demand. This is because Salesforce has shown that their certification helps people gain and show their expertise. The final exam and continued education required to maintain a Salesforce certification means that those with that credential really know their stuff. Because of this, making sure the evaluation piece of this certification is reliable and valid is hugely important. Developing the final exam will be a deliberate, methodical process.

These analyses helped me better understand my role as an instructional designer. Specifically, when it comes to making sure that the comprehensive nature of this certification does not overwhelm the learner. I will also be a key player in the development of the final exam and re-certification decisions. Taken together, the environmental and needs analyses helped me better understand Entrata's goals for this certification and led to my product/system recommendations outlined later in this proposal.

## Topic Analysis

The majority of content in this module is principle-based. For this material, I worked with subject-matter experts to understand how this foundational knowledge fit into the big picture. This knowledge covered the topics of permissions, access parameters, and permissions.

***Leasing Setup Preview Topic Analysis***

| Topic | Sub-topics | Sub-sub-topics |
|---|---|---|
| Permissions *(C)* | Keys to the room | Group level permissions: Creating groups allows you to set up group-level permissions. Then any user assigned to a group will adopt all group-level permissions.<br>User level permissions: If a user needs any customized permissions different from the group-level, these can be assigned at the user-level. |
| | Giving permission | General rule of thumb for giving permission:<br>1. Create group permissions<br>2. Assign a user to a group<br>3. Make exceptions using user-level permissions |
| Access Parameters *(C)* | Access to general system features | Types of access parameters:<br>1. Two factor authentication - are users required to set up two-factor authentication when creating their login.<br>2. SiteTablet accessibility - do users have access to Entrata's SiteTablet app?<br>3. Idle time - how long can a user be idle before they are automatically logged out.<br>4. Etc. |
| | Editing access parameters | User profile vs. group details: Access parameters can be edited on the page right after clicking on the user or group name. However, this profile page is titled differently for users and groups.<br>- Users = Profile<br>- Groups = Group Details<br>Most access parameters have a Yes/No option<br>Use group settings or set custom settings: Just like permissions, access parameters default to group settings but you can also set custom settings at the user-level. |
| Settings *(C)* | Room decor | Company settings: Settings that impact every property in the company portfolio.<br>Property settings: Settings that impact a single property.<br>Website settings: Marketing-related settings (covered in a different certification). |
| | Configuring settings | Navigation notation:<br>Tool Tips: The tool tip icon is next to every setting and provides added context to the purpose of the setting. |

| | | |
|---|---|---|
| | | Find a setting: The find a setting tool lets you search for settings by keyword/phrase.<br>Bulk edit: A select number of settings can be bulk edited.<br>Property settings validation tool: The property settings validation tool lets you compare settings to a baseline property. |

*Table 1. Topic analysis of conceptual content included in the introductory module.*

*F – Fact* *P – Procedure*
*C – Concept* *I – Interpersonal skill*
*R – Rule/principle*

## Procedural Analysis

On the other hand, task prioritization setup and using the property settings validation report were both processes that required a procedural (or task) analysis. I observed SMEs completing the tasks and drafted a script with the steps I saw them take. The script was vetted by the SMEs for accuracy.

***Task Prioritization Setup Procedural Analysis***

| **Step** | **Sub-step** | **Cues** |
|---|---|---|
| Navigate to the dashboard setup | Setup >> Company >> General >> Dashboard | **Know**: Where task prioritization is set up.<br>**Cue**: Rules for setting priorities on approval tasks |
| Click the edit icon for the category you want | Edit Rules | **Know**: Which priorities you want to set up<br>**Cue**: Edit icon |
| Review column information | Base events or criteria for the priority (Escalate when column) | **Know**: How the rule logic works<br>**Cue**: Column headings |
| | Other two columns indicate when the event is considered urgent or important | **Know**: What needs to happen for the task to be considered urgent<br>**Cue**: Add rule options listed or X days |
| Edit the rules | To Important | **Know**: What needs to happen for the task to be considered important<br>**Cue**: Types of logic listed (categorical, X days,$X, etc.) |
| | To Urgent | **Know**: What needs to happen for the task to be considered urgent<br>**Cue**: Types of logic listed (categorical, X days, $X, etc.) |
| Save changes | Click save | **Know**: Rules are filled in based on company workflows/preferences<br>**Cue**: Edit Rules window closes and you return to the rules for setting priorities page + dashboard logic will follow |

*Table 2. Breakdown of the steps for setting up task prioritization for the Dashboard.*

***Using the Property Settings Validation Report***

| **Step** | **Sub-step** | **Cues** |
| --- | --- | --- |
| Give user access to the property settings validation report | View access parameters for user | **Know**: This report is associated with an access parameter<br>**Cue**: Yes/No toggle in user profile |
| | Make sure the Property Settings Validation Report is toggled to Yes. | **Know**: Who you would like to give access to<br>**Cue**: Yes/No toggle option |
| Navigate to the tool | Setup >> Properties | **Know**: Where the tool can be found<br>**Cue**: Property settings title cues the learner that this will be in the property settings |
| | Click on the Property Settings Validation button | **Know**: The purpose of the tool<br>**Cue**: Clicking the button takes you to a new window with comparison options |
| Select the properties | Select baseline property | **Know**: This is the property you are going to compare the other properties to.<br>**Cue**: Compare To |
| | Select property (or properties) to compare to the baseline | **Know**: These are the properties that will be compared to the baseline property<br>**Cue**: Properties to Validation |
| Select the sections of settings to compare | Filter the sections if you'd like | **Know**: All are selected by default<br>**Cue**: "All Sections Selected" |
| | Uncheck/check the section(s) of settings to compare | **Know**: If there are specific settings you are looking for<br>**Cue**: Drop-down with sections listed. |
| Generate report | Click generate report | **Know**: Preferences have all been selected<br>**Cue**: Green Generate Report button |
| Compare settings | View overall match percentage | **Know**: The percentage listed at the top indicates how closely the listed property settings compare to the baseline property<br>**Cue**: % MATCH |
| | Look at specific sections and settings | **Know**: You can look at all the mismatched settings<br>**Cue**: Drop-down with sections listed. X SETTINGS MISMATCH |
| Download report | Download excel file | **Know**: Download the report for filtering and further analysis<br>**Cue**: Download report button |
| View/update settings | View the settings of the baseline property | **Know**: The system can take you directly to the baseline property's setting section<br>**Cue**: View button |
| | Update the settings of the validated property/properties | **Know**: The system can take you directly to the validated property setting so you can make any desired updates<br>**Cue**: Update button |

*Table 3. Steps for using the Property Settings Validation tool.*

## Timeline

The entire certification, including my Setup Preview module, is set to launch at the end of June 2023. We are scheduled to complete beta testing by May, giving us two months to polish the course and make changes before the launch. We have another course being developed simultaneously by the same team, which requires strict priorities. Because this is a brand new team, we spent a good amount of time up front determining our workflows to help the process run smoothly. We are using ClickUp, a project management software, to track and time our tasks.

February & March 2023

- [ ] Analysis
- [ ] Content discovery
- [ ] Module design
- [ ] Asset development

April 2023

- [ ] Review (see backlog for details)
- [ ] Begin beta testing
- [ ] Beta post-tests
- [ ] Beta focus groups

May 2023

- [ ] Updates to content based on beta feedback

June 2023

- [ ] Product launch

## Product Backlog

Talking head video
- Scripted
- Recorded
- Edited
- Added to Rise

Permissions walkthrough video
- Scripted
- Recorded
- Edited
- Added to Rise

Settings Validation Tool walkthrough video
- Scripted
- Recorded
- Edited
- Added to Rise

Dashboard Task Prioritization video
- Scripted
- Recorded
- Edited
- Added to Rise

Settings Validation Tool simulation
- Developed in Storyline
- Audio recorded/added
- Uploaded to Rise

Task Prioritization simulation
- Developed in Storyline
- Audio recorded/added

- Uploaded to Rise

Rise Content
- Outlined
- Developed in Rise

Final Quiz
- Questions written
- Approved by SME
- Input into Rise

Your Turn Prompts
- Written/added to Rise

Course Review
- Initial ID review of Rise elements
- Initial SME review of Rise elements
- Final ID review of Rise+all assets
- Final SME review of Rise+all assets

Add to LMS
- Export and upload to Docebo
- Test as learner
- Publish course

## Budget

The budget for this project is proprietary and as such, I am unable to review the details in this proposal. However, using an eLearning Developer Calculator (*Elearning Development calculator - estimate course time & cost,* 2022), it is estimated that instructional designer fees for the design and development portion of this project will range between $7,220 and $9,627.

This calculator takes the following into consideration:
Length of course in minutes: 45 minutes
Interactivity: Level 2 (Text, graphics, with simple branching, quizzing, and user participation)
Level 2 Development Range: High
Development time: 260 hours, based on the Chapman Alliance ratio (How long does it take to create eLearning, 2010).
Who will be performing the work: Salaried employee
Employee salary: Average ID salary in Utah $75,192 (Instructional Designer Salary in Utah, 2023)
What "load" factor would you like to add to get to the true cost of the employee: I calculated for 0 and 33% (which is recommended). This is what contributed to the range provided above.

Additional time and money will be spent on the analysis and beta testing/evaluation phases, though these details are less easily averaged.

## Product Design

To address learner and stakeholder needs, a 7 module certification was created. As previously mentioned, my project product is the introductory module of this certification. This module is divided into several lessons, including a final review/quiz that learners are required to pass before moving on to subsequent modules.

### Design Details

The certification is housed in Entrata's LMS. Learners can access the introductory module after they create an LMS account and register for the Leasing Setup certification.

Once registered, learners can start the module and work through it at their own pace. This is what the certification looks like within the LMS. The seven modules of the certification are organized as one learning plan within the LMS.

### *Entrata LMS*

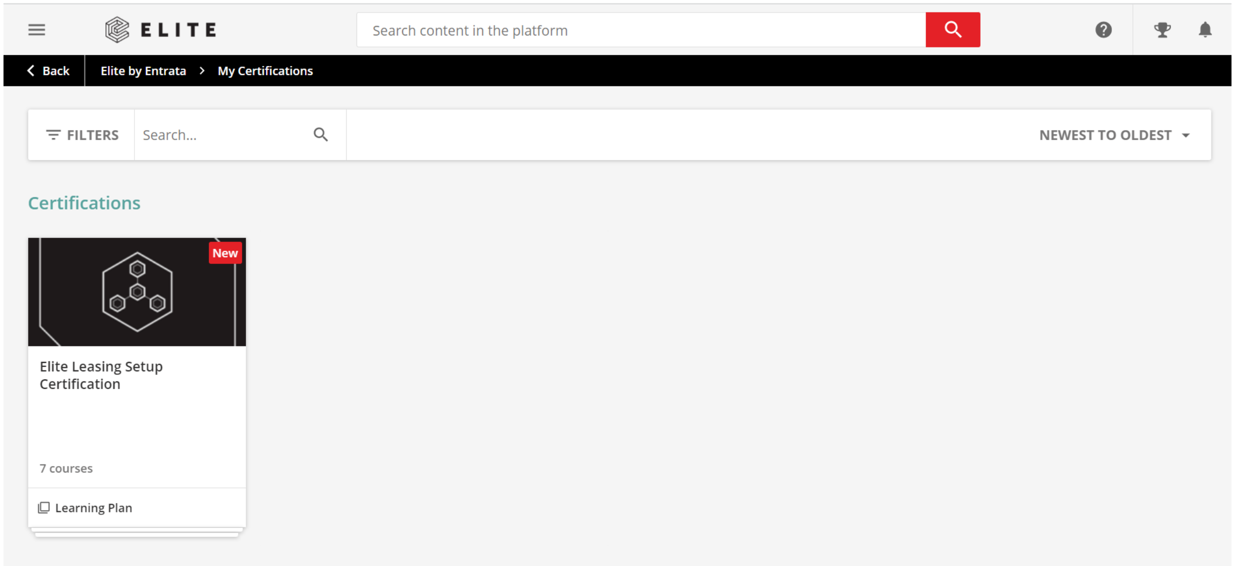



*Figure 1. Leasing Setup Certification published in Entrata's LMS.*

### *Introductory Module*

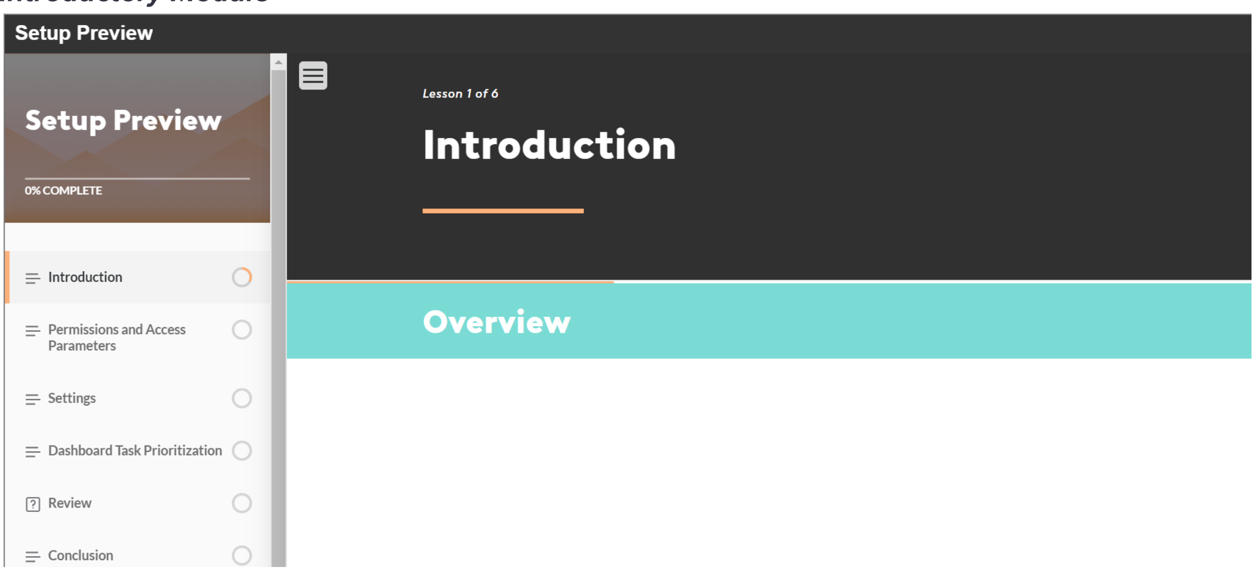



*Figure 2. View of the Setup Preview module in the LMS.*

There are six lessons in the Setup Preview module.

- **Introduction**: This lesson lists the learning objectives and includes an animated/talking head video introducing the key concepts that will be discussed throughout the module.

- **Permissions and Access Parameters**: This lesson covers permissions and access parameters. There are two main sections:
  - What are Permissions?
  - What are Access Parameters?
- **Settings**: This lesson covers everything related to settings. There are three main sections:
  - What are Settings?
  - Configuring Setting
  - Comparing Settings
- **Dashboard Task Prioritization**: This lesson discusses task prioritization on the dashboard. There are two main sections:
  - Task Statuses
  - Setting Up Task Prioritization
- **Review**: This is the review quiz for the module with 5 questions aligned to the module learning objectives.
- **Conclusion**: Key takeaways are highlighted in the conclusion, and several Your Turn practice prompts are provided for learners to explore in their test Entrata environment.

## Instructional Strategy

***Bookend Blend Model***

The entire certification is a blended learning experience, adhering to Rosset & Frazee's (2006) bookend blend model and the flipped classroom model. We chose to pattern our certification after these models because they are learner-centered (Bergmann & Sams, 2012) and have been shown to improve learner performance (Akçayır & Akçayır, 2018). These models are very similar; the bookend blend is essentially a flipped classroom but specific to the corporate setting. It suggests:

1. An introductory experience online
2. A substantive learning experience face-to-face
3. A conclusion that extends the learning into practice at work

Our certification essentially duplicates this model. Learners complete four self-paced online modules (#1). Then they sign up for and attend a live-virtual lab where they will gain more experience applying what they have learned (#2). After that, learners proceed with the final three modules (#1) before attending and completing a final live-virtual lab (#2).

Rather than a conclusion at the end of the entire certification that extends the learning into practice at work, we opted to include "Your Turn" prompts at the end of each online module (#3). These prompts provide an opportunity for learners to elevate their learning experience and apply what they have learned in their Entrata test environment.

The Setup Preview module I developed is part of the first self-paced, online learning experience. While the introductory lesson does expose learners to some scenarios through the simulation practices, the majority of the content in the lesson is foundational knowledge that is necessary to prepare learners for the subsequent learning experiences. Our learning strategy is to provide this type of foundational knowledge in an online format, while reserving the virtual lab time for higher-ordered, scenario-based learning. In this way, we are following the flipped classroom model. Learners will complete the self-paced online content first to prepare them for a more hands-on, application-based lab experience. We anticipate this approach will allow our learners to successfully meet the learning objectives.

***Cognitive Load Theory***

Cognitive Load Theory (CLT) also guided my plans for design and development. Extraneous, intrinsic, and germane cognitive loads were all considerations as the project began.

*Intrinsic Cognitive Load*

I made it a priority to understand my learner's intrinsic cognitive load when conducting the needs analysis and developing personas. In doing so, I prepared myself to answer the question: "How difficult will this be for my learner given their current level of Entrata expertise?" as I designed and developed the learning experience. This allowed me to more accurately determine the amount of content to include in my module and how to present that content.

*Extraneous Cognitive Load*

To reduce extraneous cognitive load, I developed three style guides to ensure a cohesive learning experience within and across modules:

- Video style guide
- Rise style guide
- Storyline style guide

I also made good use of Rise and Storyline templating options, which facilitated more rapid development when the time comes.

*Germane Cognitive Load*

Germane Cognitive Load ties back to our use of the Bookend Blend Model. Our ultimate goal is to develop a learning experience that facilitates effective learning. Doing this will require us to challenge our learners at times. Perhaps more importantly, it will require us to provide opportunities for our learners to apply what they are learning. The simulations and lab experiences are particularly aligned with these germane-related activities.

## Course Overview

Six lessons make up the Setup Preview module, and it is estimated learners will need approximately 45 minutes to complete the module content. The course content is all organized within Rise (Articulate). Rise galleries and knowledge checks were appropriate for presenting content definitions, short step-by-step processes, and application scenarios. For some content, simple Rise interactions were not ideal. In these instances, I opted to create content in other editing tools (Adobe Premiere and Storyline360) and embed them into the Rise course. This embedded content included animated videos, screen capture walkthroughs, and practice simulations. Each lesson is described below.

***Lesson 1: Introduction***

Lesson 1 provides an overview of the content that will be covered in the module. The learning objectives are listed for learners. An animated video introduces key terminology that will be highlighted in the module and used throughout the entire certification.

### *Module Overview Video*

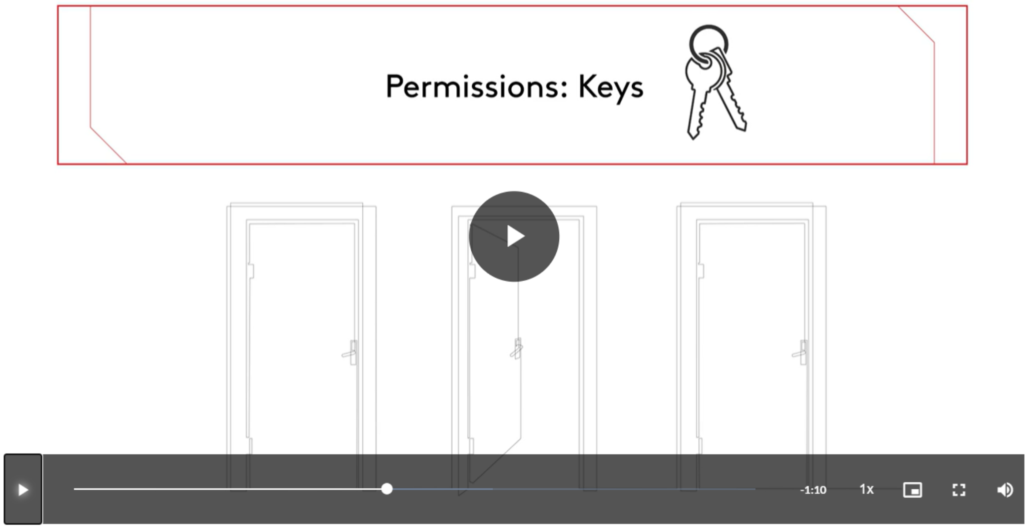



*Figure 3. Screenshot of the animated talking head video in the introductory lesson.*

### *Lesson 2: Permissions and Access Parameters*

Lesson 2 covers permissions, and the related topic of access parameters. Permissions are defined and we distinguish between the two types of permissions (user and group). A screen capture video highlights where permissions are located in the system, and the logic behind the permissions page. The recommended process for giving permission is then presented. A scenario-based knowledge check concludes the permissions section of content. Then, access parameters are defined and editing parameters are covered in a step-by-step process. Throughout this section, use case examples are provided where appropriate to help learners connect what they are learning to real scenarios they may encounter on the job.

### *Configuring Permissions*

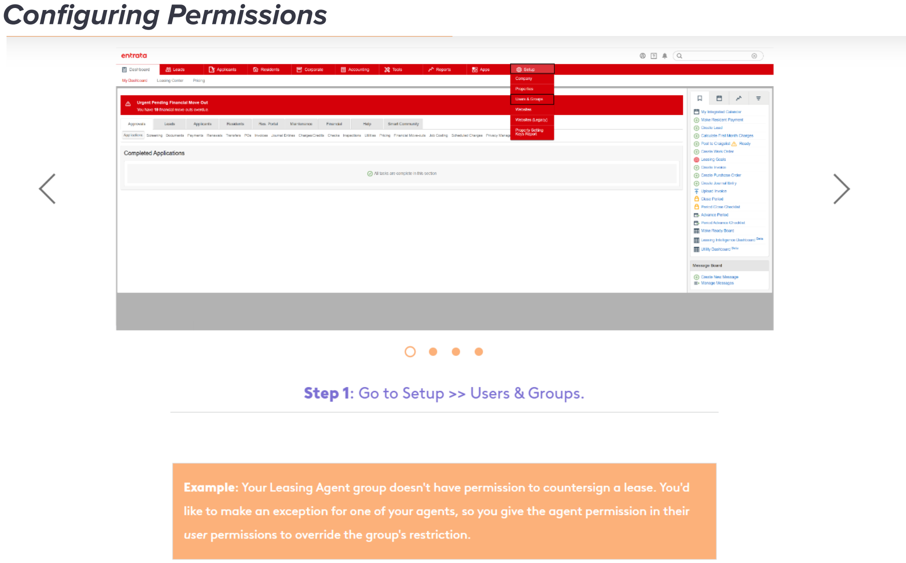



*Figure 4. Gallery of the step-by-step process for editing user permissions and a use case scenario.*

***Lesson 3: Settings***

Lesson 3 intentionally follows a similar structure to Lesson 2. In this case, settings are defined and the three types of settings are delineated. After that, we cover configuring settings. A screen capture video reinforces this process. The second half of the settings lesson discusses the property settings validation tool. Again, a screen capture video showcases this content. The lesson concludes with a practice simulation. This provides learners with the opportunity to practice using the property settings validation tool based on a specific use case scenario.

***Simulation: Property Settings Validation Report***

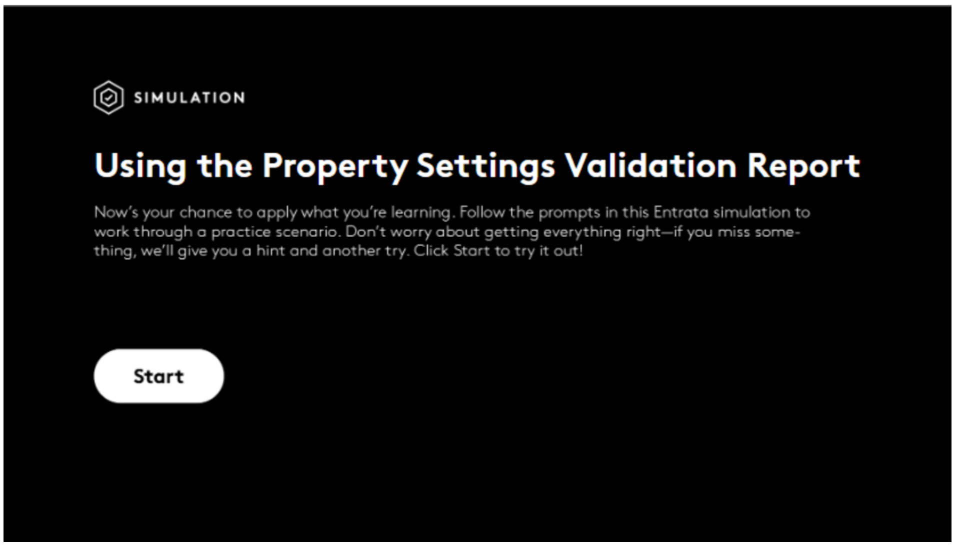



*Figure 5. Simulation for users to practice using the property settings validation report.*

***Lesson 4: Dashboard Task Prioritization***

Lesson 4 covers the somewhat miscellaneous but extremely applicable topic of dashboard prioritization. Entrata's helpful task statuses are defined, and application examples are provided. The process for setting up task priorities is then covered in a screen capture video. The lesson concludes with a practice simulation where learners are able to practice setting up task priorities.

### *Simulation: Dashboard Task Prioritization*

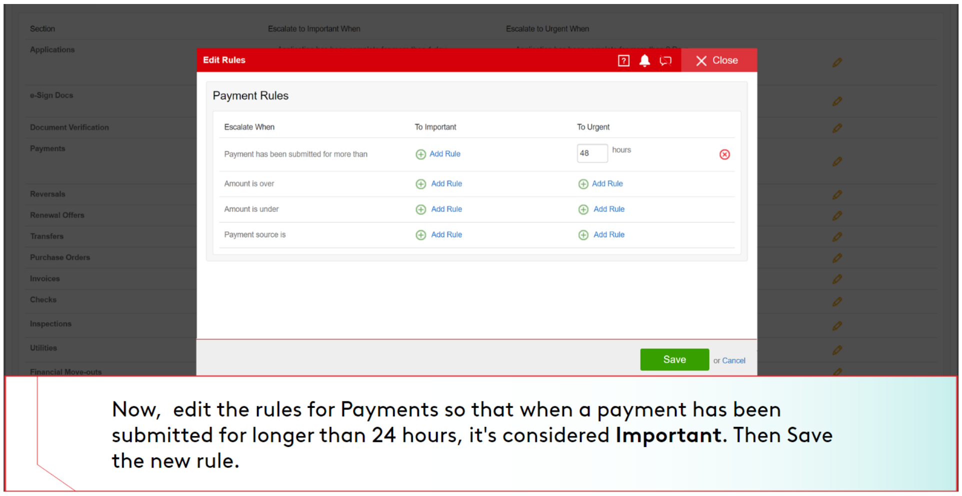



*Figure 6. One of the slides for the task prioritization simulation.*

### *Lesson 5: Review*

Lesson 5 is the module quiz. Learners must score 80% or better on the quiz to move on to the next module.

### *Module Quiz*

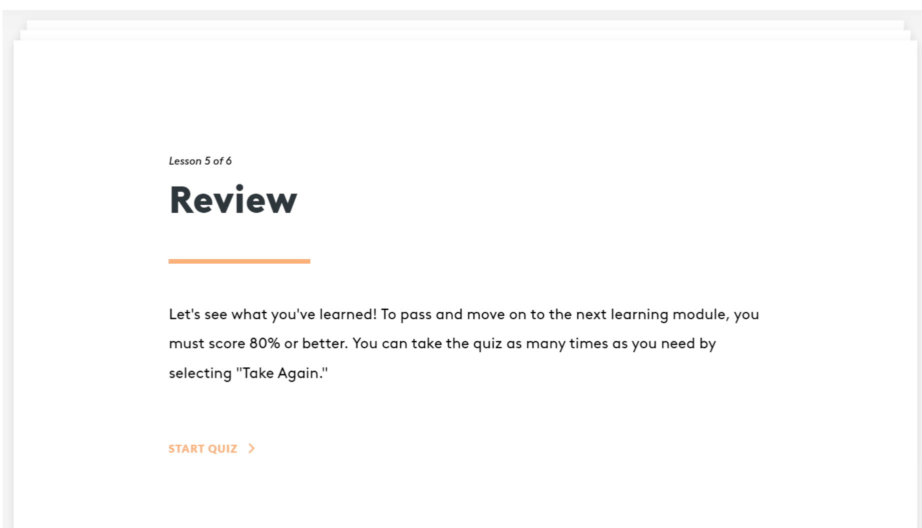



*Figure 7. Directions for the end-of-module review quiz.*

### *Lesson 6: Conclusion*

Lesson 6 wraps up the Setup Preview module. Five key takeaways are listed - each aligned to the learning objectives presented in the introduction. The conclusion also includes three Your Turn prompts. Learners are encouraged to go into their practice Entrata environment and practice with the prompts provided. This extra practice is particularly useful in preparing learners for the synchronous lab they are required to attend halfway through the certification.

### *Module Wrap-Up*

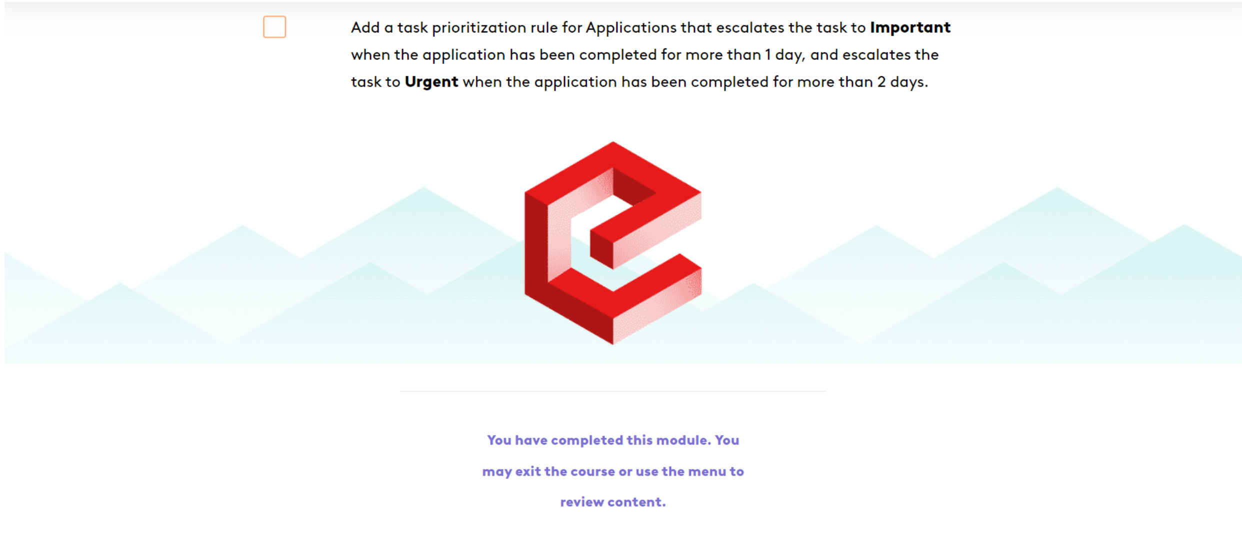



*Figure 8. The final Your Turn prompt for module 1 and the completion message.*

## Video Walkthrough

https://youtu.be/kZXJAZLoQTI

## Design Process and Evolution

### *Analysis*

I was not employed by Entrata during the conceptualization of this project so the first phase I was involved in was the analysis. My involvement kicked off with the learner and needs analyses, described at the beginning of the report. This allowed me to empathize with my learners and I started thinking about the best way to meet the goals of the project.

This phase also included an analysis of the originally proposed instructional method. The initial proposal was to have all of the content presented as videos. The course would essentially be back-to-back videos. The plan was to use talking head videos to cover the foundational content, while screen capture walkthroughs would be used to show processes. When I was brought onto the team, I pushed back on this idea. Not only would the development of these videos (particularly talking heads) be more time consuming, but they were also not always the best modality for presenting the variety of content the certification would contain. While talking heads and screen captures have their place - and were used in my module, at times - I suggested leveraging our access to Rise for portions of the content, as well.

### *Design*

The team was open to my proposal so I took a small section of content and mocked up an example of how we could combine the use of videos and Rise elements to design a more interactive, learner-centered course. This mock-up included Rise hotspots, knowledge checks, process interactions, and more.

The team and leadership responded favorably to this idea, and I moved forward outlining the Setup Preview module and identifying the appropriate modalities for the content, based on the resources available to me.

***Module Outline***

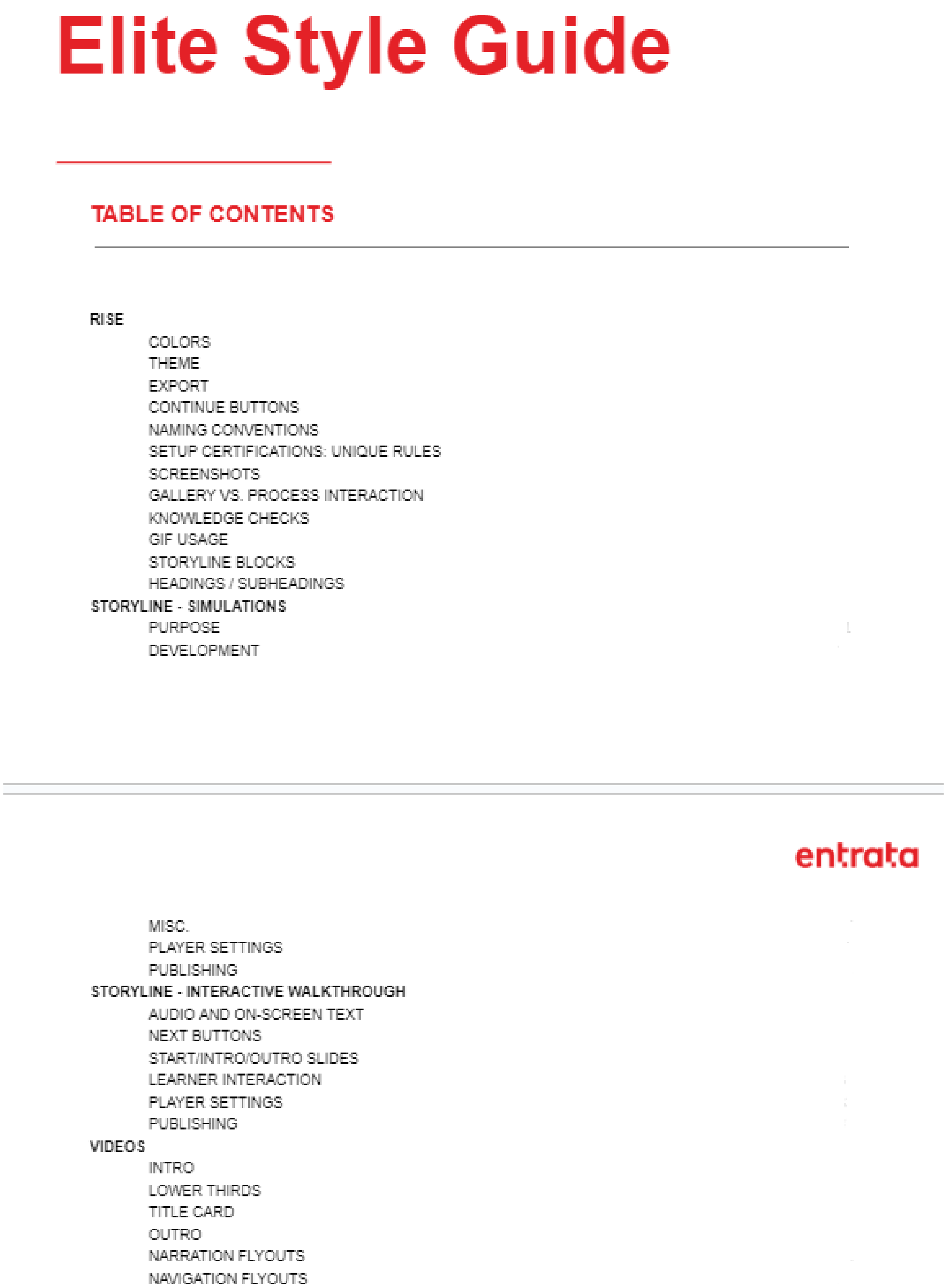
**Unit 1. Introduction**

| | Content | Modality | Assets needed |
|---|---|---|---|
| 1.0 | Overview | Header text | |
| | In this module, you will learn about the permissions and settings features that allow you to customize your Entrata experience. By the end of this module, you will understand how to:<br>1.<br>2.<br>3.<br>4. | Paragraph text and numbered list | |
| | Watch the introductory welcome video below. | Direction text | |
| | Already recorded | **Video** | 1. TH Welcome Video<br>Building graphic<br>Keys graphic<br>Home decor graphics (house plants or paintings) |

*Figure 9. Snapshot of the layout used to outline the module content.*

At the same time I was outlining the content, I was also working on a comprehensive design style guide for the project. While I worked independently on the Setup Preview module, other instructional designers were going to get started on content for the other modules so developing a style guide was a priority. The style guide included design protocols for Rise, videos, and Storyline simulations. I worked closely with the marketing team to ensure the style decisions were in line with Entrata's brand. The content writer on our team also contributed grammar and writing elements, making the style guide a robust tool for our team.

***Elite Style Guide***



# Elite Style Guide

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- PURPOSE
- DEVELOPMENT

entrata

- MISC.
- PLAYER SETTINGS
- PUBLISHING

STORYLINE - INTERACTIVE WALKTHROUGH
- AUDIO AND ON-SCREEN TEXT
- NEXT BUTTONS
- START/INTRO/OUTRO SLIDES
- LEARNER INTERACTION
- PLAYER SETTINGS
- PUBLISHING

VIDEOS
- INTRO
- LOWER THIRDS
- TITLE CARD
- OUTRO
- NARRATION FLYOUTS
- NAVIGATION FLYOUTS

*Figure 10. Table of contents for the style guide.*

***Development***

Once the design and modalities were approved, I started on the design phase. Because the animated introduction video was going to require the development of some new skills, I opted to develop that first. There was a bit of a learning curve, but with the support of another instructional designer on the team with extensive video editing skills, I was able to get the video developed. Then I worked on the Rise content before moving on to recording and editing the screen capture videos. Simulations were developed last so I could make sure what we were asking the learners to practice was covered in enough detail in the instructional content. Finally, I wrote the quiz questions.

***Internal Review***

Before publishing the course for our beta users, an internal review of the module was complete. This included the project manager/SME reviewing the course for content accuracy, our technical writer completing a copy edit review of the course, and a fellow instructional designer reviewing the course for flow and functionality. I appreciated the input from professionals with different backgrounds, and was able to make some important changes before the content was made available to our beta participants.

***Beta Testing, Surveys, and Focus Groups***

The module was then published on the LMS for beta users to consume. 20 beta participants completed the Setup Preview module and three other modules in the certification. Upon completion, they submitted a 20-question survey that included questions like:

- How would you rate the amount of content provided?
    - Too much
    - Too little
    - Just right
- I was engaged by the course content.
    - Strongly Disagree, Disagree, Neither Agree nor Disagree, Agree, Strongly Agree
- I feel the coursework was comprehensive and thorough. I feel that nothing was overlooked.
    - Strongly Disagree, Disagree, Neither Agree nor Disagree, Agree, Strongly Agree
- How likely are you to recommend this certification to a colleague?
    - Scale 1–10
- Is there any other feedback you would like to provide on your experience with the Leasing Setup Certification?

Three focus groups were conducted, as well. This allowed us to dig deeper with learners and ask about specific pain points and modality preferences.

***Revisions***

One thing the surveys and focus groups taught us was that the learners appreciated the different modalities, but they wanted more clarity on the type of content they'd be consuming from the get-go. This led us to mock up different design ideas for the title cards of the different modalities. With the help of the UX team, we were able to combine a variety of ideas and came up with a solution that addressed the concern of our beta users.

***Brainstorming***

- Interactives
    - Use a white intro card
    - Add icon above the storyline embed

- Videos
    - Use the gaming video at the beginning of video walkthroughs
    - Add icon above the video

- Simulations
    - Add icon above the storyline embed

*Figure 11. Initial idea for how we could distinguish between modalities.*

---

### *Mockup for UX*

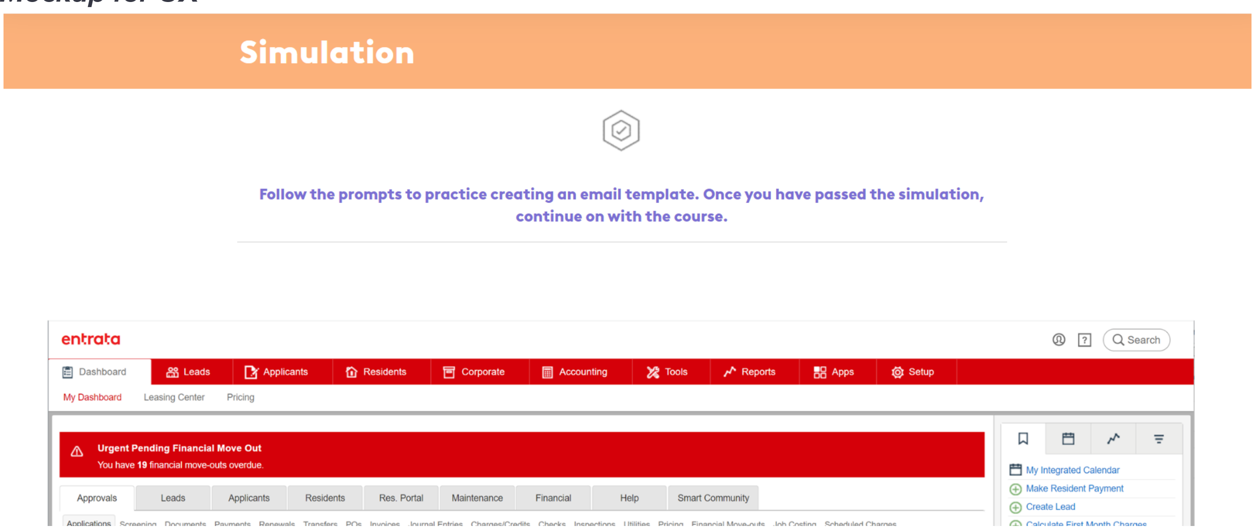


*Figure 12. This is the mockup we sent to UX for feedback.*

---

### *Final Result*

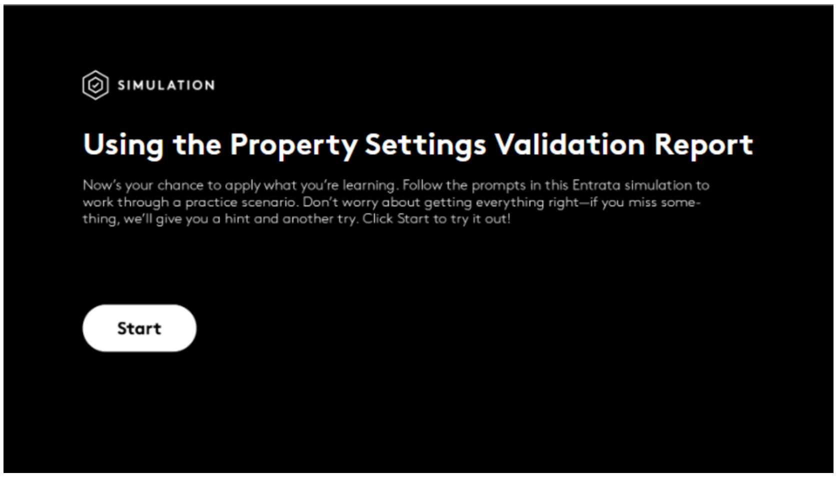


*Figure 11. After several iterations, we decided to use distinct title cards like the one shown here to distinguish between modalities.*

We also addressed concerns about quiz requirements. Initially, we had required a 100% pass rate and did not provide feedback on incorrect responses. We changed this to require only an 80% pass rate, and directed learners to the lesson where the content was covered in the course after they submitted their first response.

***Evaluation***

While the beta users allowed us to evaluate the course to a certain extent, the true evaluation will come after the certification launches and more learners participate. A detailed assessment plan has been developed, with measures from all four levels of Kirkpatrick's evaluation model. See the Evaluation portion of this report for more details.

# Product Implementation

## Learner Needs

In order for the product to be successfully employed:

- Learners needed at least a moderate understanding of Entrata and how it functions.
- Learners also needed access to their own Entrata environment *and* an Entrata test environment.

***Entrata Understanding***

All certifications will only be available to current Entrata clients to ensure they have at least a basic understanding of Entrata. However, the Setup Certification, in particular, will be clearly intended for and specifically marketed to administrative users, which means their level of Entrata knowledge is in the moderate to high range.

***Entrata Environment Access***

All current clients have access to their own Entrata environment, fulfilling that need. Additionally, a test environment developed specifically for certification participants is provided as part of their enrollment. This environment allows them to play around with different settings and permissions before making company-wide changes, without fear that it will impact their current processes and prospects.

## UX

We relied heavily on our beta participants to determine whether the product was (and will be) used as intended. Focus groups revealed a pain point related to the use of the product. Specifically, while participants appreciated the various learning modalities, they wished there were more visual cues to help them know what type of content they would be engaging with before they started (i.e. Is this a video or an interactive Storyline walkthrough? Will I be passively watching or required to engage with the content?).

To address this, I came up with a variety of options to distinguish the content. These were vetted through Entrata's UX department, and UX testing was done with Entrata employees to determine the best option moving forward. These changes have been implemented, and are aimed at eliminating the confusion on content presentation for the different learning modalities.

The Elite team also decided to create a video that briefly explains the different types of learning modalities they will encounter in the certification. Not only will this help learners be better prepared and know what kind of learning to expect, but it will be a great tool for marketing the uniqueness of the certification learning experience. Ultimately, the plan is to include this video on the Elite by Entrata website.

## Marketing

For the beta, there was no marketing involved. Rather, specific Entrata clients were selected to participate. Each client/company was able to enroll a select number of users, and their information was provided directly to the Elite team manager. The team manager then reached out directly to the participants via email with enrollment details, which required the participants to enroll in the course on Entrata's LMS.

The Elite team manager was in regular contact with the beta users and available to answer any questions they encountered during the course of their participation. While this outlet existed as an option, very few participants reached out with technical issues. It appeared participants saved course content questions for the lab session where they were able to interact with the trainer and other participants. Overall, the registration/enrollment/implementation during the beta stage was very well organized and well received by participants.

Once the certification launches in June, the registration process will run differently. Interested clients will be directed to the Elite by Entrata website and sign up there. Similar to the beta users, once payment has been received, users will be able to enroll in the course on our LMS. Support will be available for learners with any LMS or content-related questions/concerns via the LMS support center and the Elite website. Just like the beta, the labs that occur halfway through and at the end of each certification are also great options for receiving support from fellow learners and Entrata trainers alike.

While the registration process will look different between beta and launch, both did or will require users to enroll in the course on Entrata's LMS. Because of this, specific questions about the enrollment process were asked in surveys and focus groups. Slight changes to the layout of the

LMS and module organization were made to simplify the enrollment process and make accessing the courses intuitive.

## Assessment of Student Learning

For my module, I created formative and summative assessments aligned with each learning objective to ensure the learning goals were being met.

### Formative Assessment

Formative assessments included knowledge checks within each lesson and practice simulations for the task-based objectives. These were provided to learners for practice purposes only. But the data on these assessments was useful in identifying whether learners were grasping the topics being covered.

***Example Knowledge Check***

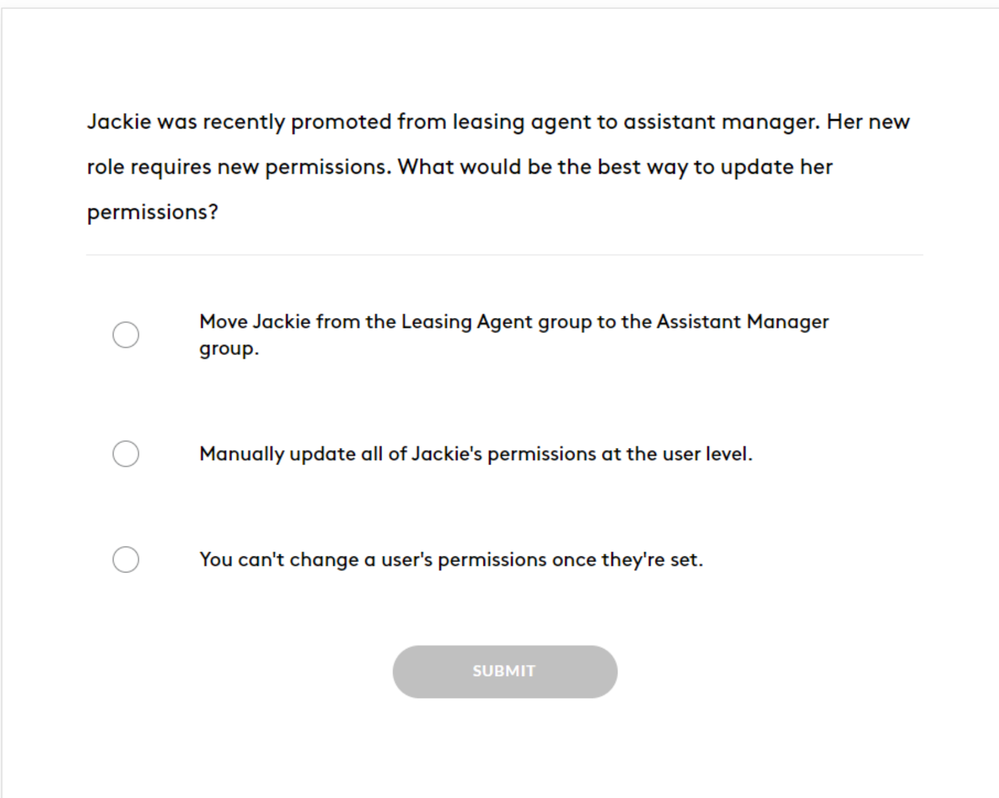


*Figure 12. Example of a scenario-based knowledge check question learners might encounter as they go throughout the module.*

***Example Simulation***

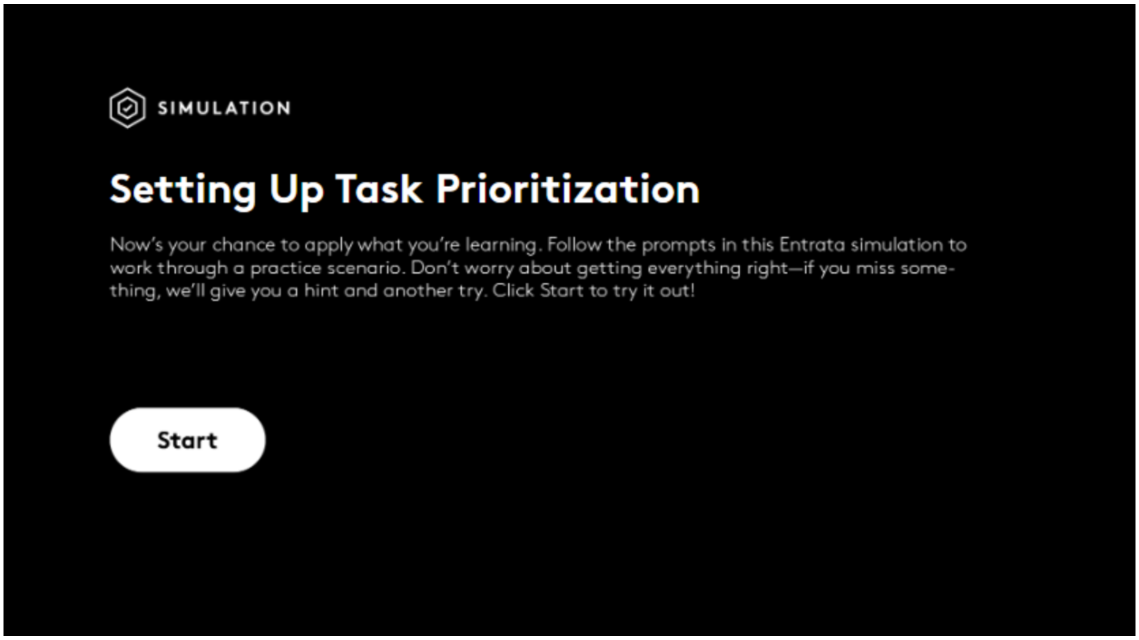


*Figure 13. What learners see as they start a practice simulation.*

## Summative Assessment

For the summative evaluation, learners took a final quiz. Learners were expected to get 80% on the final quiz.

***Example Quiz Question***

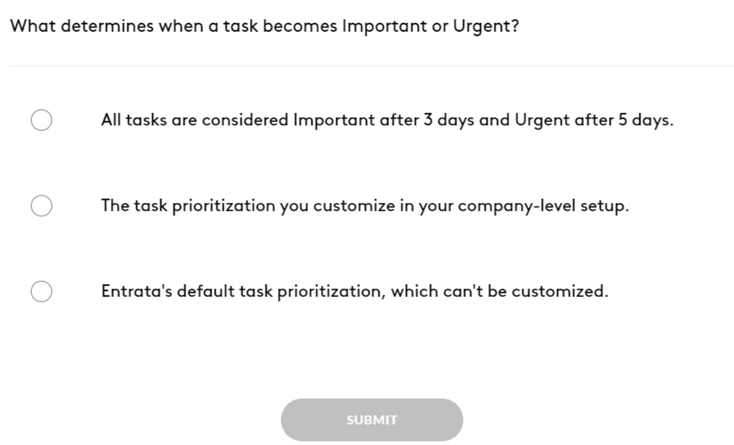


*Figure 14. Example of an end-of-module quiz question.*

Once the entire certification launches, there will also be a final exam that cumulatively tests participants on all the learning objectives of each lesson. The exam was not available to beta participants so exam data is not included in this report.

Publishing the course using xAPI allowed me to pull knowledge check, simulation, and final quiz data from the LMS. Below is an example of an xAPI report pulled from the LMS for a test user. This data is not presented in the most convenient/comparable way. Though it takes a certain level of organization and translation, the data we need is there to determine whether or not our content is successful in helping learners meet the learning objectives.

***Sample xAPI Report***

| | |
|---|---|
| 2023-03-13T17:46:44 | Amy Rogers **experienced** |
| 2023-03-13T17:46:25 | Amy Rogers **attempted** , **Duration:** 12 minutes 15 seconds |
| 2023-03-13T17:45:47 | Amy Rogers **progressed** with score **67**, **Duration:** 12 minutes 13 seconds |
| 2023-03-13T17:45:46 | Amy Rogers **experienced** |
| 2023-03-13T17:45:46 | Amy Rogers **failed** with score **67** with **INCORRECT** response, **Duration:** 12 minutes 12 seconds |
| 2023-03-13T17:45:45 | Amy Rogers **answered** Which of the following is true of Contact Points? with **CORRECT** response (clerfb1z0005735717at2nqdd) |
| 2023-03-13T17:45:40 | Amy Rogers **answered** True or False: If you have enabled and use EmailRelay, th... with **CORRECT** response (clerfadig0054357196z8p3gm) |
| 2023-03-13T17:45:37 | Amy Rogers **answered** How can a lead opt in to receiving text messages from you... with **INCORRECT** response (clerffihn00033571hceq4lws) |

*Figure 15. This sample xAPI report illustrates the type of individual learner data we are able to gather, such time spent on content and quiz attempts.*

We are also able to pull answer breakdowns for the final review. Due to confidentiality, no examples of group data can be provided in this report.

## Evaluation

As previously mentioned, a detailed evaluation plan has been developed based on Kirkpatrick's evaluation model. While we will be gathering a variety of measurements, the evaluation metric the stakeholders are most concerned about is: Will this certification sell? and Do our clients like the certification?

As noted in the plan, these level 1 evaluation measures will be gathered and shared with stakeholders routinely after the certification launches.

***Data Collection Plan***

| Measure | When? | How? |
|---|---|---|
| Certification registration numbers | Quarterly after training launches | Pull from Docebo |
| Can learners demonstrate their ability to solve scenario-based problems related to the course content? | Halfway through training<br>End of training | Elite team observe lab recordings |
| Are learners successfully passing the module quizzes? | During training | Pull from Docebo |
| How are learners doing on the final exam? | Immediately after training | Pull from final exam data |
| What do learners think of the training? | Halfway through training (for beta)<br>Immediately after training | Post-training survey |

*Figure 16. Breakdown of the measurements we plan to collect, along with when and how we will gather the data.*

While no certification registration numbers have been gathered yet, we were able to get some perception data from both our beta users and SMEs.

## Beta Users

Beta user feedback was gathered via surveys and focus groups. A few open-ended feedback responses to the question “Is there any other feedback you would like to provide on your experience with the certification?” include:

- Loved this training!
- I think it’s great if you’ve got experience with Entrata, but if brand new it could be overwhelming.

Additionally, because the focus groups were recorded, we were able to create a short video of feedback on the quality of the product and intent to buy, from the learners’ mouths. This was the most important “report” we could provide to our stakeholders. In addition to the video, we also provided our stakeholders with data on the effectiveness of the learning experience (via assessment data) and beta user survey results. The survey results were cut down for the stakeholders to focus strictly on the learner’s perception of the product.

### Expert Reviews

In addition to beta user feedback, we had several subject matter experts participate in the course. Qualitative feedback was provided, including the comments shared below:

- This is so well done and I am so excited for this to be done. The visuals and variety of modalities make the content easy to consume.
- Content is accurate and the presentation is on point.
- This certification content is next-level. It is distinct from our free content and I think our clients will love it.

## Design Knowledge and Critique

### My Biggest Takeaways

A few key design principles were reinforced as I worked on this project. The first is to expect ambiguity. When I look back on the phases of the project and realize we stuck pretty closely to the ADDIE model, I am honestly a bit shocked. Sometimes it felt like we were flying by the seat of our pants due to the pacing of the project and tight timeline. But we really weren't. Because of excellent leadership, we were able to come together at the start of the project and deliberately outline the phases we *wanted* the project to go through (with the understanding that things might not go to plan). Since nothing like this had been done at Entrata before, we were unsure of how it would actually work out. There were a lot of unknowns but because we had a plan, we were able to be productive despite the ambiguity that existed. And for the most part, we were able to stick to our plan. I don't think this would have been possible if our team hadn't been willing to be flexible and push forward without seeing the whole picture from start to finish.

Another bit of design knowledge I learned is that there is great value in seeking feedback from professionals with different backgrounds and strengths. Prior to this project, my teams had been made up of all instructional designers. Getting feedback from them was invaluable; however, having a review process that included a SME and a technical writer, and being able to reach out to Entrata's UX team for insights helped me to see the project from different angles. I was able to make the product better because of them. It was intimidating at first to have a new kinds of eyes on my work, but it was worth pushing through the discomfort. My willingness to expand my professional circle has stretched me as a designer and helped me develop in new, meaningful ways.

Finally, I learned that designing never ends. Initial reviews, internal reviews, beta testing, and beyond - there will always be something that can be done better. But in order to know what needs to be done better, the design needs to be put out there for people to see. Before this project, I had the tendency to want to have everything polished and perfect before anyone could see my work. But what I learned by having a formalized review process is that my work won't ever be perfect. And it especially won't ever be perfect if I keep the design to myself. Pushing through the discomfort of other people seeing my works-in-progress has shifted my mindset on the timing of feedback.

## Critiques

Looking ahead and knowing that I will be involved in the development of future certifications, there are a few areas I hope to improve moving forward. First, I think with better planning we can get more from our beta users. Fortunately, from a beta participant perspective, the beta was a success. They were impressed with what they saw and are excited for the product to launch. However, from a design and certification development team perspective, we could have gotten more value out of the beta had we been better prepared. Our beta surveys were developed last minute and as a result, there were certain questions that were redundant and other questions we wished we would have asked but didn't. There is also room for us to improve our focus group facilitation skills. Each team member facilitated a group and watching those back helped me realize things I want to do better when I am facilitating in the future. For example, my colleague was so good at using participant's names and always thanking them for their feedback. I think this enhanced the feelings of safety in the focus group and I want to apply that moving forward.

One other area I hope to improve is our assessment questions. We already made some changes to the summative assessment based on beta user feedback. In addition to this, I hope to better validate the questions we are asking in the final review. While we have tried our best to align them with the learning objectives, a more deliberate effort to tie the two together would be helpful.

Lastly, with more time, I would love to incorporate more animated videos in our certification content. The introductory video of my module was fairly basic but I think the direction we are moving with those is a good one. The visuals can help reinforce key terminology, and it's more memorable than a simple talking head video.

## The IP&T Program

Real world work is not as pretty as the textbooks make it sound. But that doesn't mean there isn't value in the textbooks. The theories and skills I developed as a student in the IP&T program allowed me to successfully complete this project.

I remember sitting in a lecture on colors and (naively) thinking, "When am I going to use this?" But let me say now, I go back to what I learned about colors and style guides on a regular basis. My manager has complimented my ability to confidently contribute to our style guide development and design aesthetics, and I have my design courses to thank for that.

The introductory instructional design course taught me the importance of doing legwork up front: creating personas, empathy mapping, environment analysis, etc. These can be the tasks that individuals without a formal instructional design background want to skip over. But the time it will save in the long run makes it worth it to prioritize this work.

And lastly, the skillset I developed taking the beginning and intermediate product design classes set me on the right trajectory to be able to be involved in a project like this in the first place. I actually reached out to the instructor of those courses as I worked on this project because of his expert knowledge in the area of xAPI reporting. Not only am I thankful for the skills and knowledge I gained, I am also grateful for the connections and networking opportunities this program provided.

## Conclusion

Overall, this project allowed me to apply what I learned in the IP&T program in a professional context. And in doing so, I was able to further expand my design skills and knowledge. This project taught me the importance of accepting ambiguity, collaborating with non-instructional designers, and putting my work in front of people even when it doesn't feel done. These are lessons that will stick with me as I move forward in my career as an instructional designer.

## Annotated Bibliography

### Domain Knowledge

Because I was new to the corporate space as I started on this project, it was important for me to look at precedent and how certifications in this space have become successful. Each article here helped me realize the potential of a well-developed certification program for learners *and* the company. These articles sparked important conversations with my team about upper management buy-in, re-certification, evaluation, and more.

*3 ways a certification program can boost a SAAS company's revenue*. EduBrite. (n.d.). Retrieved March 28, 2023, from https://www.edubrite.com/3-ways-a-certification-program-can-boost-a-saas-companys-revenue

This article discusses how certification programs can set SAAS companies apart and make them money in the process. Because there are so many SAAS companies that address the same types of problems, certification programs can (1) empower customers and help them feel connected to a product, (2) be sold to customers for additional revenue, and (3) get people in the industry talking, which can establish the product as the benchmark brand. The need to get the support of upper management is mentioned in another article listed here, and this EduBrite piece allowed me to better speak the language of management ($$).

*How to create a certification program?: Certifier*. Certificate Maker - Create & Send Digital Certificates. (n.d.). Retrieved March 28, 2023, from https://certifier.me/blog/how-to-make-a-certification-program

This article covers the benefits of creating a certification program and outlines the steps for getting started. It encourages having a full vision of the certification, including the re-certification process, before diving in. Recommendations for making a certification valuable, affordable, flexible, and enjoyable are discussed. This article was helpful as my team mapped out our design and development plan of the certification. It also prompted important (and continuing) conversations about what we want re-certification to look like.

Moorhead, C. (2016, December 27). *7 steps for building a credible certification program*. Security Info Watch. Retrieved March 28, 2023, from

https://www.securityinfowatch.com/video-surveillance/article/12289208/7-steps-for-building-a-credible-certification-program

Moorhead discusses the differences between a certification program and typical training programs. She highlights the importance of gaining the support of upper management when developing a certification program, because it is a real investment of time - especially in the early stages. The article concludes with specific steps for creating a certification program. These steps extend beyond the initial development phase and incorporate testing, implementation, and maintenance steps that are critical to the success of any certification program. This article validated my team's process for development, testing, and implementation. It was also helpful for me to be forward-thinking about the maintenance of the project. This impacted the organization and SOPs for the development of each type of modality.

Choudhury, M.C. (2023, February 20). *Salesforce certification guide: Roles, paths, exams, cost, training, requirements*. CIO. Retrieved March 28, 2023, from https://www.cio.com/article/234728/7-salesforce-certifications-that-will-advance-your-career.html

This article discusses a certification pioneer in the tech industry: Salesforce. Salesforce provides an example of the impact a successful certification can have on the success of a product, and how the product - and people who know the product - are viewed in the industry. It outlines the benefits of a Salesforce certification on an individual's career path, and touts the demand for individuals with Salesforce skills. Referencing other successful certification programs was useful as my team determined the use case for our certification and the ultimate goals we are aiming to accomplish with our certification program.

## Learning Theories

It was surprisingly difficult to find articles on learning theory in the corporate setting, but I still felt like the work of Akçayır and Akçayır (2018) and Bergmann and Sam's (2012) was relevant. Regardless of the setting, a lot of the challenges and advantages to a flipped learning experience are consistent. I gravitate toward this theory because of the improved learning performance and improved learner satisfaction reported when learning is flipped. The Rossett and Frazee (2006) article built on this by providing a blended learning framework that would facilitate a flipped learning experience in the corporate space. Finally, de Jong's (2010) review of cognitive load theory informed the content I created for the web-based portion of the flipped, blended learning experience.

Akçayır, G., & Akçayır, M. (2018). *The flipped classroom: A review of its advantages and challenges*. Computers & Education, 126, 334-345.

Akçayır and Akçayır reviewed 71 research articles on the flipped classroom model and reported their findings. They found the most common advantages of using the flipped classroom model were: improved learning performance, improved learner satisfaction, increased learner engagement, and increased learner motivation. These were some of the top priorities of the team. On the other hand, the disadvantages of using this model (i.e. limited student preparation, unable to receive guidance at home, inability of instructors to know if students engaged in the content or not) were less of a concern in a corporate environment, especially because we were able to provide guidance to learners throughout the entire process and track participation in the

LMS. Taken together, the findings of this article guided my team's decision to use the flipped classroom model in our certification approach.

Bergmann, J., & Sams, A. (2012). *Flip your classroom: Reach every student in every class every day*. International society for technology in education.

This book provides an overview of the flipped classroom model, and practical experience from teachers who shifted their classroom from traditional to flipped. While their experience teaching was at the high school level, their practical experience and techniques can be applied broadly to any teacher, trainer, or instructional designer adopting the flipped classroom model. The most relevant content from this book when it came to my project was in regards to how I view the role of teacher and student - or in my case, trainer and learner. This book reminded me that the trainer is not there to simply dispense information. The trainer is there to facilitate application of learning. In order for the client learner to be ready for that applied experience, the training material that I created needed to align with the in-person training content.

de Jong, T. (2010). *Cognitive load theory, educational research, and instructional design: some food for thought*. Instructional Science, 38, 105–134. https://doi.org/10.1007/s11251-009-9110-0

The primary goal of this article was to discuss the challenges of measuring and conducting research on cognitive load. While interesting points about cognitive load were made, the most relevant part of this article for me was de Jong's review of the three types of cognitive load: intrinsic, extraneous, and germane cognitive load. These became regular topics of conversation with my team as we determined what amount of content and what type of content was appropriate without unnecessarily burdening our learners. As an instructional designer, it is a delicate balance and important to keep all cognitive load factors in mind when developing content for learners.

Rossett, A., & Frazee, R. V. (2006). *Blended learning opportunities*. American Management Association: AMA Special Report, 1-27.

A flipped classroom experience is also a blended learning experience when the out-of-class portion is web-based, which was the case for our certification. As such, this article on blended learning in the corporate training environment was particularly relevant. Rossett and Frazee introduce three different corporate blended learning models. My team opted to use a modified version of the Bookend Blend Model. This article also prompted important conversations about how to measure the success of our program, as it specifically discussed a variety of options for evaluating blended corporate training experiences.

## Instructional Design Approaches

These four articles all informed my approach to the design and development of my project. Dousay (2018) and Evans (2018) both encourage instructional designers to be deliberate in their ID approach, regardless of what approach they take. Because of this, I determined an approach before I dove into the project. I loosely followed the ADDIE model with a few modifications based on other model recommendations. Determining this from the get-go allowed me to articulate my plan and set expectations, just like the successful, expert instructional designers Fortney (2018) studied. Finally, the five principles Collis and Margaryan (2005) discussed for corporate instructional design were foundational to my overall design approach. Specifically, my decision to prioritize application opportunities grounded in real workplace problems.

Collis, B., & Margaryan, A. (2005). Merrill plus: Blending corporate strategy and instructional design. *Educational Technology, 45*(3), 54–58. http://www.jstor.org/stable/44429212

M. David Merrill reviewed a large collection of instructional design theories, textbooks, articles, and perspectives and created the Five First Principles of Instruction that he says are "necessary for effective and efficient instruction." The authors of this article, Collis and Margaryan, reviewed these principles and discussed how they apply in a corporate setting. They paraphrase these five principles as: (1) build the course around workplace tasks, (2) start where the learners are at, (3) demonstrate and guide, (4) provide opportunities to practice using real workplace situations, and (5) reflect and synthesize the learning experience. I can't count the number of times I referred back to these principles during the design and development of the certification. These principles drove my design process as I sought to creatively guide my learners and provide practice opportunities often.

Dousay, T. A. (2018). Instructional design models. In R. E. West, *Foundations of learning and instructional design technology: The past, present, and future of learning and instructional design technology*. EdTech Books. Retrieved from https://edtechbooks.org/lidtfoundations/instructional_design_models

This chapter reviews the ADDIE Process, the PIE Model, the Diamond Model, and Plompt's OKT Model regularly used in instructional design. The relevance and prominence of different models over time was presented. The chapter concludes with "Tips From the Field." In this section, I particularly appreciated the tip from Rhonda Gamble: Practicing ID means considering all of the available tools. It's too easy for a designer to fixate on a single instructional technique as a panacea." This was an appropriate caution for our team as we worked together to determine what we wanted our design process to look like. For me, an understanding of a variety of effective instructional design models was critical. As a newly formed team, we were fortunate to be able to brainstorm and identify the processes that were going to work best for us. The foundational knowledge from this article (and my experience in the program) informed a lot of our team processes - though we are continually iterating and fine-tuning.

Evans, J. R. (2018). Instructional design methods. In R. Kimmons, *The students' guide to learning design and research*. EdTech Books. Retrieved from https://edtechbooks.org/studentguide/instructional_design_methods

Evans encourages designers to develop a deliberate approach to each project to avoid design paralysis in the later stages. He acknowledges that most instructional design models are fundamentally alike, but beginning a project by identifying which model or approach is *most* appropriate can pay off in the end. In an attempt to aid in this decision, he then briefly discusses seven different ID methods: Agile, Waterfall, Rapid Prototyping, ASSURE, AGILE, Design Thinking, and Design Layers. Similar to the Dousay chapter, this was practical and relevant as our newly formed team worked together to determine the best approach for us. And I have to concur with Evans that the choice to determine a deliberate approach helped us avoid roadblocks later on in the development process.

Fortney, K. S., & Yamagata-Lynch, L. C. (2013). *How instructional designers solve workplace problems*. Performance Improvement Quarterly, 25(4), 91–109. https://doi.org/10.1002/piq.21130

Fortney looked at expert and novice instructional designers at two corporations. She compared how they dealt with ambiguous problems. As a rather novice instructional designer myself, it was helpful to read about how expert instructional designers approach their work. Fortney identified setting expectations and relationship buildings as key to the success of instructional designers. In my work on this certification, I aimed to approach my work with these keys in mind. I met with my manager weekly to set expectations, and I developed relationships with trainers, other instructional designers, and technical writers who helped me in my efforts to problem solve.