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Honors Thesis

THE IMPLEMENTATION OF TRANSFORMATIVE
LEARNING THEORY AND IMMERSION

by
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Submitted to Brigham Young University in partial fulfillment
of graduation requirements for University Honors

Experience Design and Management
Marriott School of Business
Brigham Young University
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ABSTRACT

THE IMPLEMENTATION OF TRANSFORMATIVE LEARNING THEORY AND IMMERSION

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Experience Design and Management

Bachelor of Science

Through this creative project, Transformative Learning Theory and immersion are implemented into the redesign of a core business class in Brigham Young University's Experience Design and Management discipline. Experience design principles of empathize, define, ideate, prototype, and test are discussed and used to map out the redesign of EXDM 415, Experience-Centric Management. Empathy data was collected through course evaluations, emailed correspondence, and word of mouth. The data was then used to define underlying needs of students and potential concerns from previous iterations of the course. The class prototype consists of newly developed learning outcomes/objectives, immersive class simulations, and an employee handbook. The prototype is tested through class implementation. Feedback is collected through focus groups and ongoing course evaluations.

ACKNOWLEDGEMENTS

I would like to thank Dr. Camilla Hodge for her infinite patience and humble corrections. She was a constant guiding hand throughout the entirety of my thesis process. I would also like to thank my EXDM 415 students. They were always patient with my mistakes and kind in their feedback. Their excitement towards learning gave me consistent motivation to keep the project going. The Experience Design and Management program also deserves recognition for their dedication to student success and personal development. Every professor I had, especially my committee members consisting of Dr. Camilla Hodge, Dr. Brian Hill, Dr. Peter Ward, and Dr. Mat Duerden, had lasting effects on both my professional and personal life. Lastly, I would like to thank my fiancé, David, for his consistent motivation and words of wisdom. No matter how many times I complained or wanted to give up, he never failed to believe in my academic potential.

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I. INTRODUCTION

Experience Design and Management is the study of intentional human experiences. At Brigham Young University, this discipline originated in the College of Health and Human Performance (now defunct) as the Department of Recreation Management and Youth Leadership (RMYL). In 2009, the college was dissolved, and RMYL was transferred into the Marriott School of Management (now the Marriott School of Business). The department evolved to focus on the study of the *experience industry*.

The experience industry is "...[the] ability to motivate people, one day and one innovation at a time" (Kinni, 2011, pg. xiii, quote from Walt Disney). Or, more directly, the experience industry encompasses any economic activity that is associated with the design and staging of *experiences*. In this sense, *experiences* become an economic offering, as Pine and Gilmore argued (1998). Disney parks and cruises are classic examples of the experience industry. Pine and Gilmore took the basic principles of economic offerings being only commodities, goods, and services and tacked on *experiences*. Experiences are different from services because "when a person buys a service, he purchases a set of intangible activities carried out on his behalf. But when he buys an *experience*, he pays to spend time enjoying a series of memorable events that a company stages – as in a theatrical play – to engage him in an inherently personal way" (Pine and Gilmore, 2020, pg. 3). When an economic offering crosses the threshold into an *experience*, time becomes the currency. The consumer is willing to give more of their assets if they feel their time is being well spent. A company offering becomes an

experience when they “...engage customers, connecting with them in a personal, memorable way” (Pine and Gilmore, 2020, pg. 4).

Upon joining the Marriott School, the department changed its name to Experience Industry Management (EIM). Experience industry as a concept acting as an umbrella over recreation and leisure. Continued evolution expanded industrial and departmental understanding of the broader value and applicability of *experiences*. Therefore, the department changed its name again to Experience Design and Management (ExDM).

ExDM is a rapidly growing discipline, not only academically but professionally. In an everchanging corporate world, “...business relies on design. In creating, marketing, and delivering value, design is used to make sure that the end result is what business believes will be effective enough to connect with customers and help them realize the value they are seeking” (Farnham and Newbery, 2013, pg. 3). This supports the idea that Pine and Gilmore shared of time becoming the currency. This is an opportune time for designers within the business world.

Given the increasing professional relevancy of experience design and management, the ExDM undergraduate curriculum evolved to focus more on experiences. The most recently developed course map (Winter 2024) contains general business courses accompanied by the core major classes:

- EXDM 350 – Diversity, Equity, and Inclusion
- EXDM 404 – Experience Design
- EXDM 405 – ExDM Theories and Frameworks
- EXDM 415 – Experience-Centric Management

- EXDM 416 – Experiential Marketing
- EXDM 422 – Experience Needfinding
- EXDM 423 – Experience Insights
- EXDM 495 – Professional Preparation

In creating these courses, faculty committed to identifying and collaborating with an external industry partner to consult on their undergraduate courses. Moreover, the department has embraced the process of design thinking which focuses on iterative design and delivery of human-centered, data-informed experiences (Duerden and Rossman, 2019). Thus, a course that had existed for some time in the undergraduate curriculum (EXDM 412 – Event and Experience Management), was identified as one that needed redesigning to effectively meet student professional preparation needs. From this process, EXDM 415 was created.

When Dr. Camilla J. Hodge was hired in 2021, she was tasked with redesigning EXDM 412 to create EXDM 415. As part of this process, she was introduced to Elliott Nelson, CEO of HXWize. He helped inform the development of a new curriculum for the 3-credit, core course (i.e., required for all ExDM students) that focused on experience design as a lens for managing and leading people. She piloted the course in Winter 2022 and revised its structure again in 2023. The course objectives endeavor to guide students towards success within the corporate world while maintaining high moral and ethical values. The learning objectives for both the W2022 and W2023 courses were:

1. Students will become confident in who they are in the sight of God, and let knowledge guide their relationships with other people by engaging in respectful

and professional teamwork and reflecting on the gospel application of management principles.

2. Students will become effective ambassadors of experience-focused management by evaluating best practices in exemplar organizations (i.e., case studies).
3. Students will become skilled leaders and managers of the evolution from service-centricity to experience-centricity by applying theoretical and practical management principles and creating a documented process of change (Hodge, 2023).

As a student in the W2023 version of the course, I followed unit outlines of human experience (HX), agile, and metrics. Following the W2023 midcourse evaluations, the professor, Dr. Camilla J. Hodge, decided to redesign the last portion of the class facilitating a more immersive experience.

The new EXDM 415 curricula has been embraced by the ExDM faculty, but as the major teaches, consistent feedback and numerous iterations are important for the improvement of the courses and the development of the students. Due to the ExDM values of iterative design and applying what students are being taught, the courses are perpetually within states of reiteration. This is done by evaluating feedback through summative and formative course evaluations. The task of a professor is to participate and engage in professional development. These teachings and improvements impact what is being taught. Therefore, the purpose of this thesis project is to prototype and test a new tool for the newest iteration of the EXDM 415 course – Experience-Centric Management. This project follows the design thinking process to accomplish its purpose. Thus,

subsequent sections correspond with the design principles of *empathize*, *define*, *ideate*, *prototype*, and *test*.

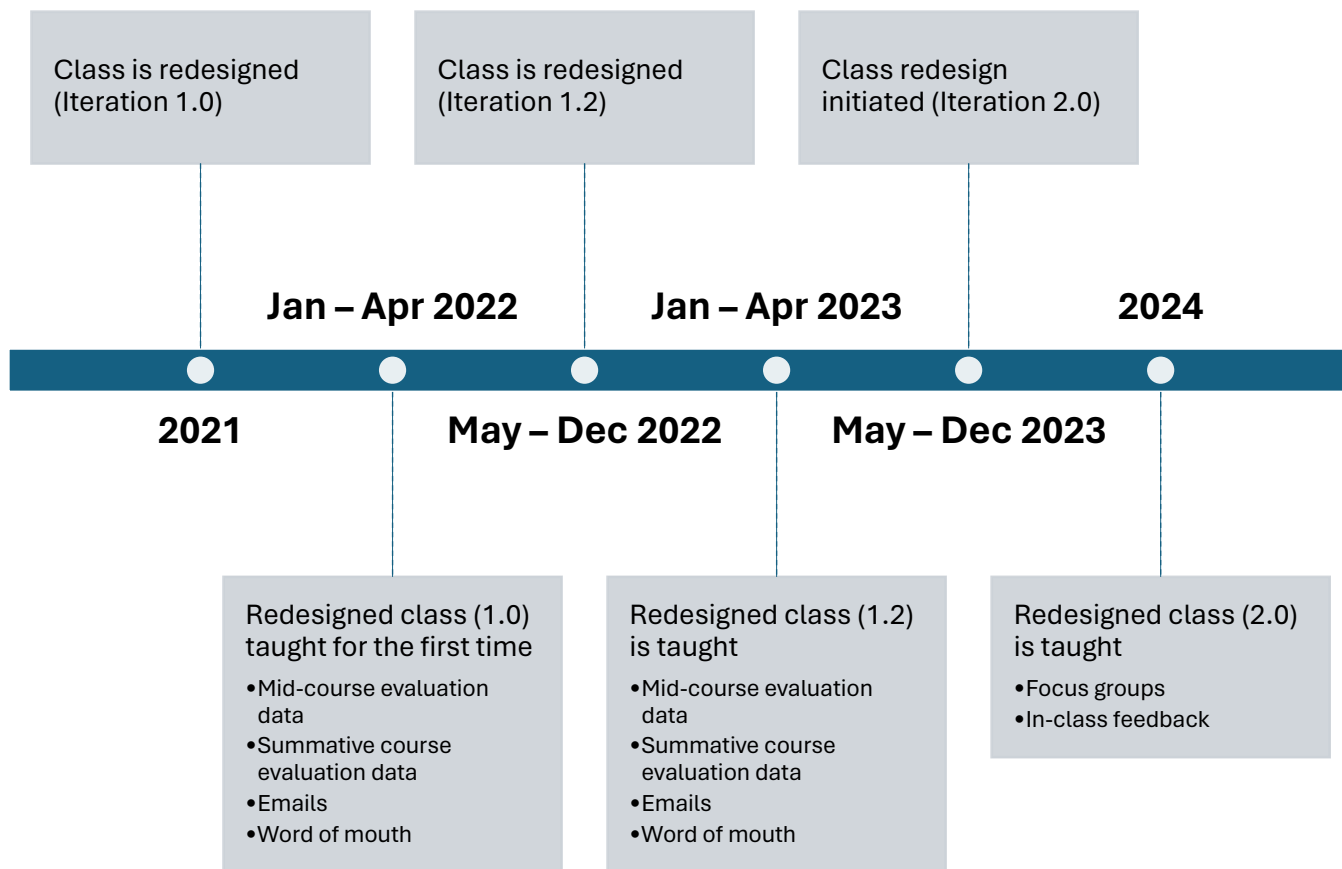


Figure 1 EXDM 415 Timeline

II. EMPATHIZE

The first principle of design thinking is *empathize*. Empathy is “.... borrowing the feelings of another in order to really understand them, but never losing your own identity...” (Kalisch, 1973, pg. 1). It is putting yourself in the situation of others to truly understand what they are going through. When beginning to evaluate a situation that demands change it is impossible to determine the root issue/need without empathy. This empathy is “...the antithesis of the usual professional analysis and evaluation which prompts such comments as ‘I know what your problem is...’” (Kalisch, 1973, pg. 1). As experience designers, the goal is to find the need and elucidate the problem. There is often something deeper than what appears to be the issue.

Before approaching any problem, or usually what we assume to be the problem, the individual or ‘user’ must first be understood. If the designer is incapable of understanding the depth of feeling, frustration, roadblocks, etc., then they won’t be able to solve any probable issue. Thus, to effectively empathize with the student ‘users’, I gathered and evaluated the following EXDM 415 empathy data: (1) course evaluations, (2) email correspondence, (3) word of mouth or anecdotal data.

COURSE EVALUATIONS

When it was resolved that an EXDM 415 course redesign would occur, the first approach was to evaluate and gather feedback from the previous cohorts. Each semester, students are granted the opportunity to give mid – and final – course evaluations. There are specific markers the students are asked to rate and scale. Those scales are then followed by open-comment opportunities. To understand what had worked and what

hadn't, those previous course evaluations were assessed. Due to the highly qualitative nature of the data, the university integrates the data into usable graphs and visuals for quicker assessment. They use mixed methods to provide the professors with both qualitative and quantitative data.

EMAILED CORRESPONDENCE

Emails from students to faculty and/or TAs from W2022 – W2023 were collected. Names were removed to protect confidentiality before they were shared. During the course and following the completion, several students reached out to the instructor through emailed correspondence.

WORD OF MOUTH

With cohorts of approximately 135 students, copious amounts of information are passed through word of mouth. To better understand the effects of this communication, the term *buzz* will be used interchangeably with word of mouth. Consumers are quick to believe that the main component of marketing a product, or in this case a university course, consists of very traditional commercialized methods. These methods are believed to be the most impactful way of communicating a product offering. It would be neglectful to say that these more traditional methods hold no impact, but data proves that *buzz*, or word of mouth, is just as, if not more, effective than the believed traditional methods:

- “Friends and relatives are the number-one source for information about places to visit or about flights, hotels or rental cars...” (Rosen, 2002, pg. 5)
- “Seventy percent of Americans rely on the advice of others when selecting a new doctor... Sixty percent of women surveyed for *Self* magazine cited ‘friend,

family, or co-worker referral' as one of the factors influencing over-the-counter drug purchases" (Rosen, 2002, pg. 6)

Buzz is genuine excitement about a new person, place, or thing (Rosen, 2002). It's whatever is attracting people's attention. *Buzz* consists of all communications regarding a product, company, person, etc. that is moving from person-to-person. In a study conducted in both Belgium and the Netherlands, it was found that "being exposed to an emotional condition has a marked impact on a person's motivation to seek social contact" (Luminet et al., 2000, pg. 662). Those who have an emotional connection to an experience will seek out others for either support or consolation. It was also found that simply talking about stressful or emotional situations aided in decreasing psychological distress (Luminet et al., 2002). Thus, the *buzz* regarding EXDM 415 was being primarily spread by those who had a negative and emotional experience participating in the course.

III. DEFINE

Summative course evaluations from W2022 and W2023 were organized by the Center for Teaching and Learning in their process called Comment Classification. Comment Classifications were completed separately for each of the three sections in W2022 (Figures 1 – 3), but in aggregate in W2023 (see Figure 4). Data from the Comment Classifications shows that students more frequently have positive things to say about the professor ($M = 48\%$) than about the course ($M = 27\%$). Students also had more negative things to say about the course than the professor and more students had negative things to say about the course in W2022 than in W2023. It is also important to note that the feedback was optional for students, not everyone participated.

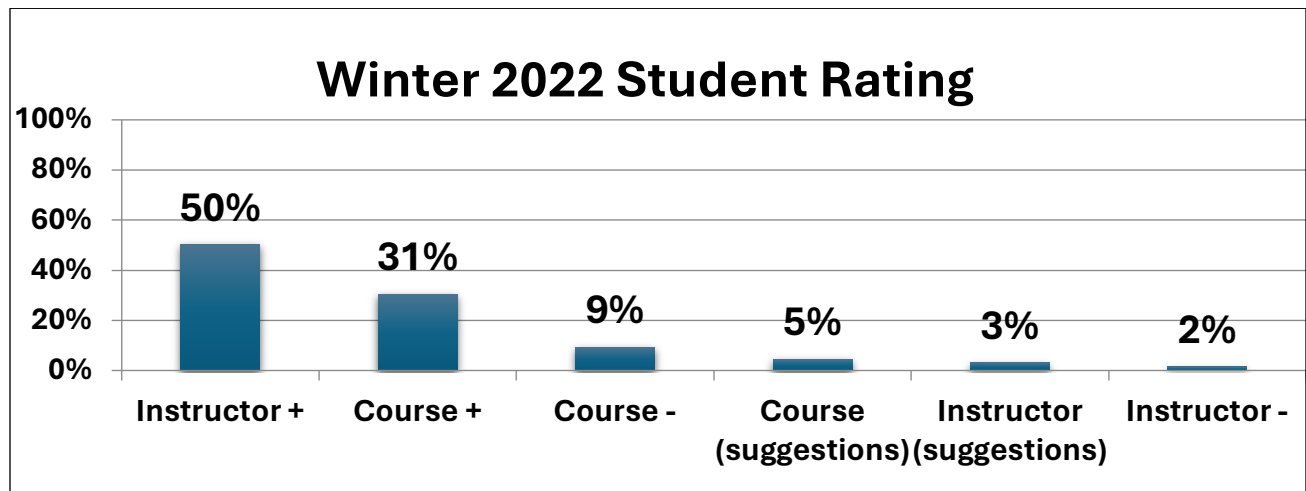


Figure 2 - 2022 Section 3

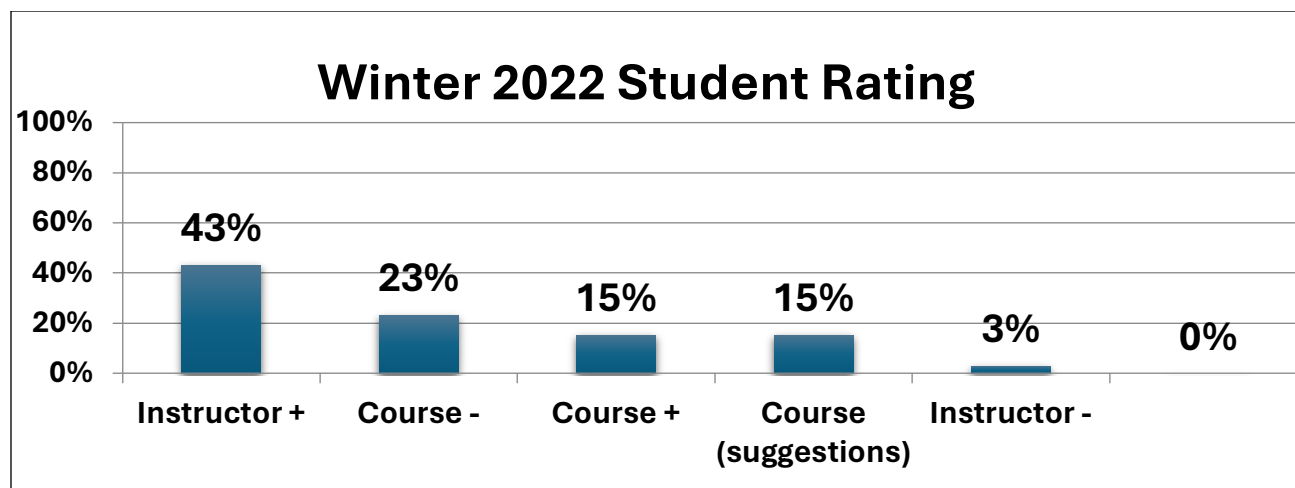


Figure 3 - 2022 Section 2

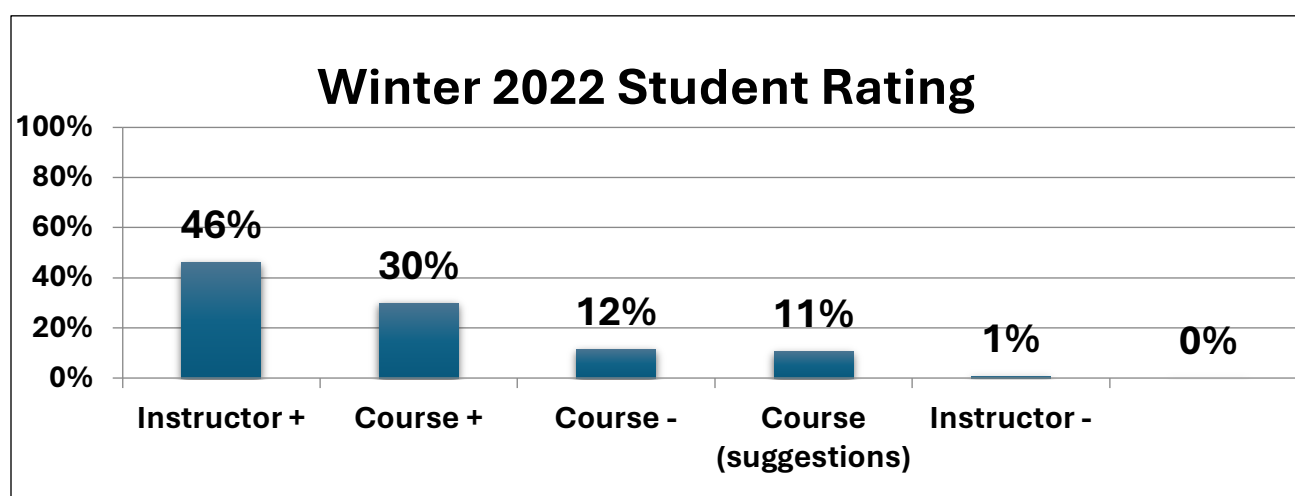


Figure 4 - 2022 Section 1

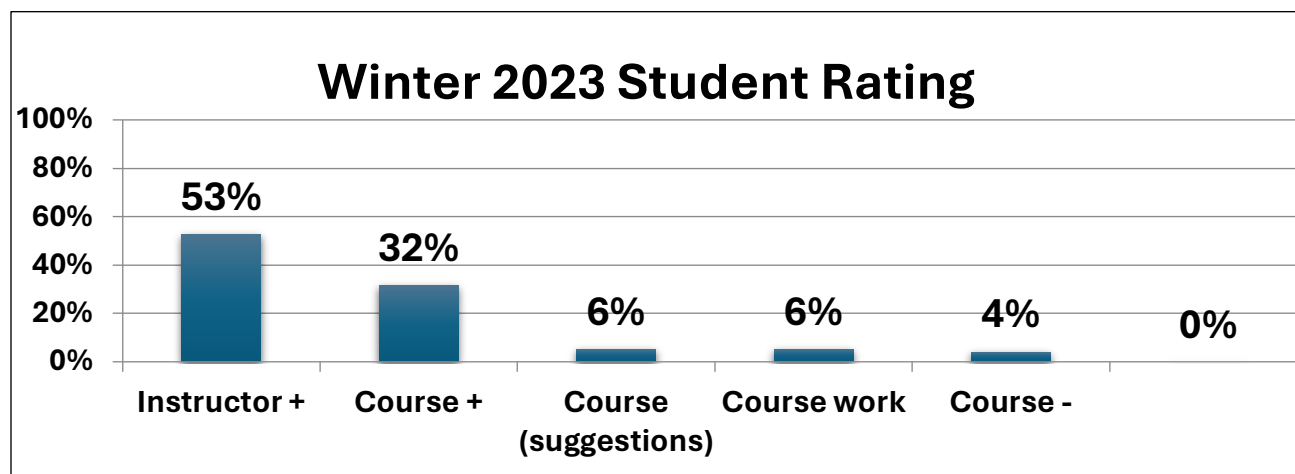


Figure 5 - 2023 Section...

A review of student emails reveals a range of perspectives:

- “I just wanted to let you know that your class has been the most influential and beneficial to me at my current internship than any of the other Junior core classes. The fact that I have a basic knowledge of Agile has put me miles ahead of my peers and allowed me to communicate more effectively with my supervisor and other executives. I would have been so lost in the jargon without the foundation you provided” (Student name removed to maintain confidentiality).
- “I wake up on Mondays and Wednesdays filled with absolute dread and anxiety, leave this class feeling utterly drained, and struggle for the remainder of the day to recover any sense of value in my life and education... There is no opportunity for me to practice this in my own life, and without real life examples, I’m not even sure how I would go about trying to do it on my own...” (Student name removed to maintain confidentiality).

A review of word of mouth empathy data indicated that in the case of EXDM 415, the course without a doubt created *buzz*, but the “excitement” aspect of the definition wasn’t as prevalent as a professor would hope. During the examinations of course evaluations and word of mouth (collected through TA and EXDM student observations), it was becoming obvious that the information being passed around the cohort about the course was primarily from those who had not enjoyed their experience.

After a reflection of the data, the decision to completely redesign the course content and structure was made. The first step was defining what principles, values, and

learning objectives would be reflected in the new course material. As a discipline within the Marriott School of Business, a deep dive into the school's mission, vision, and values was required:

Mission:

- We develop leaders of faith, intellect, and character.

Vision:

- We aspire to transform the world through Christlike leadership.

Values:

- Faith in Christ – We value deep and abiding faith in Jesus Christ. Our faith gives us the capacity to envision a better future, the confidence to make the future happen, and the courage to act in the face of challenges.
- Integrity in Action – We value integrity and hold ourselves to the highest moral and ethical standards. Acting with integrity builds trust, strengthens character, and focuses our ambitions on things of eternal consequence.
- Respect for All – We value respect for all individuals as children of God and recognize the inherent worth, divine potential, and agency of each person. A climate of respect and belonging enhances our learning, facilitates collaboration, and encourages personal growth.
- Excellence – We value excellence in learning, teaching, research, management, and leadership. An expectation of excellence magnifies our influence and motivates us to continually improve.

From the outline of the previously mentioned principles and Bloom's Taxonomy, the following W2024 learning outcomes were developed:

- Apply and Create – Students will become fluent in Agile concepts by learning to define Agile mindset and methods.
- Understand and Apply – Students will become lifelong learners who embrace self-reflection, adaptability, and feedback by demonstrating knowledge of and applying growth mindset principles.
- Apply - Students will become proficient in Agile project management by learning Microsoft Planner and preparing for the Scrum Master certification exam.
- Analyze and Evaluate – Students will become effective team members by practicing self-management and accountability as they evaluate themselves and their team using performance metrics.
- Create – Students will become confident in who they are in the sight of God, and let that knowledge guide their relationships with other people by engaging in respectful and professional teamwork and reflecting on the gospel application of management principles.

The learning outcome of most importance continues to be the focus on building students' understanding of their shared divine identity. This learning outcome is prioritized because of the MSB Mission, Vision, and Values statement and the overarching Aims of a BYU Education. The updated learning outcomes reflect the need to increase the immediate applicability and relevance of the course. In reviewing comments from student evaluations, the instructor, Dr. Hodge, determined that one of the

major pain points or roadblocks in the class experience was the over-emphasis on concepts. The course centered on teaching mindsets (e.g., a human-centric mindset, a metrics mindset, and an agile mindset) which seemed, upon reflection, to favor management job titles that were likely not to be entry level positions. Dr. Hodge also determined that adding “resume builders”, or hard skills, could help students better understand the relevancy of the class. From the collection of empathy data and defining the problem, we recognized that *BYU students who are part of the Experience Design and Management junior core desire real-life application and hard skills to better prepare them for their future endeavors.*

IV. IDEATE

How might we implement Transformative Learning Theory and immersion to teach real-life application and hard skills?

Once the problem has been discovered and defined, the designer can now begin coming up with ideas. Ideation is “... the process of generating or conceiving new ideas...” (Reinig and Briggs and Nunamaker Jr., 2007, pg. 144). Ideation methods are dependent upon the individual and their personal creative preferences. Designers will often hold ideation sessions. These sessions consist of time dedicated to ideating. The designer will set constraints, timers, differing scenarios, etc., to facilitate diversity of ideas and potential solutions. When ideating, it is important to focus on the quality of the act. Rather than trying to push one specific idea, the focus is on the process (Reinig and Briggs and Nunamaker Jr., 2007).

From our define stage, we discovered that “BYU students who are part of the Experience Design and Management junior core desire real-life application and hard skills to better prepare them for their future endeavors”. This Point-of-View, or Need, statement guided the ideation sessions in the EXDM 415 redesign. The ideation involved individual reading and research from the TAs as well as extensive sticky note sessions outlining course ideas and schedules.

From the research, Transformative Learning Theory was uncovered. Transformative Learning Theory seeks to “...better understand the depth of adult learning that is possible when elements of *choice* and *critical reflection* occur” (Bueddefeld and Duerden, 2022, pg. 3). The theory circles around the idea of students experiencing a transformation through disorienting dilemmas – something which causes a

shift in a set mindset. The development of this theory of learning began in 1978 by Jack Mezirow. The goal within the theory is to “... transform problematic frames of reference – sets of fixed assumptions and expectations (habits of mind, meaning perspectives, mindsets) – to make them more inclusive, discriminating, open, reflective, and emotionally able to change” (Mezirow, 2003, pg. 58). This shifting of assumptions and expectations is often caused by disorienting dilemmas, or situations that shift/challenge your original way of thinking. As our ideation continued, it was understood that this theory reflected the learning goals we had created for the students. This theory was particularly reflective of two of the learning outcomes:

- Understand and Apply – Students will become lifelong learners who embrace self-reflection, adaptability, and feedback by demonstrating knowledge of and applying growth mindset principles.
- Analyze and Evaluate – Students will become effective team members by practicing self-management and accountability as they evaluate themselves and their team using performance metrics.

In 2000, scholar Robert Kegan identified the adult learning capability of critical self-reflection (Mezirow, 2003). This reflection is necessary for improvements in critical and reflective judgement. From the empathy data that was previously gathered, we recognized the students desire for applicable skills post-graduation in the business world. The method in which the skills were taught in the previous cohorts were not found as being effective long-term. This idea of transformation knitted together with critical self-reflection guided a large portion of the redesign.

As ideas continued to flow, we were reminded of the impact of immersive experiences. These simulation-type situations allow the individual to feel separate from the real world. To fulfill the students' need of real-life application, we played around with the idea of a consulting firm simulation/immersive classroom experience. It has been found that "...when people encounter an unfamiliar situation, it pushes them to alter their regular pattern of thinking, and this experience might lead to the development of new perspectives" (Onosu, 2021, pg. 2). We wanted their thinking patterns to shift and their methods of implementation to reflect real-world scenarios. It has been found that "when students participate in immersion activities... the cultural exposure triggers an awareness process that can lead to the reevaluation of personal views of self and others" (Onosu, 2021, pg.3). As we began to narrow down how our ideas aligned with our goals, it was determined that an immersive classroom would best support the success of the students.

V. PROTOTYPE

How might we best format class materials to best prepare students for their future endeavors?

Following the selection of ideas, prototyping begins. Prototyping can present itself in a multitude of ways. It can consist of 3D modeling, role-playing, diagrams, etc. There is no limit to the methods. In terms of EXDM 415, our prototyping consisted of designing a class structure that simulated onboarding and training for a mock “job” and an accompanying “employee handbook”. These two prototypes had countless iterations and changed throughout the prototyping stage (See Appendix A and B for examples).

Prototyping began with revising the course map and the content units it represented. Initial wireframe versions of the course map were developed in PowerPoint and discussed with TAs who had completed the course the previous year. The course map was streamlined from five units to three: Becoming a Better Teammate, Becoming a Better Team, and Doing the Thing. Each unit was represented as a level in a video game and students would “level up” throughout the semester as they mastered different skillsets. Additionally, the course units coincided with employee lifecycle stages: attraction/recruitment, onboarding, development, retention, separation/advocacy. Thus, the typical pre-semester welcome email that the instructor would typically send evolved to include a recruitment video, a job description, and a 30-, 60-, 90-day onboarding plan.

Prototyping the immersive nature of the simulated “mock job” spurred the development of a hypothetical consulting agency. This “company”, Sonder, is an experience design consulting firm. The instructor used AI to generate a company logo and branding guidelines that are visible throughout the course on Canvas (the course

learning management system) and in PPTs and other course resources or documents (Seen in Appendix C). Inexpensive swag items (pens and stickers) were also branded with the Sonder logo and presented to students on their “first day of work” to simulate the first-day-of-work gift that they might receive in a ‘real’ job.

The previous iteration of the course included course assignments such as individual and group case studies, individual readiness assurance tests (iRATs), and journal reflections. To better reflect the newly developed course objectives, the course work was redesigned to focus on self and team development, as well as real-world implementation of newly learned principles. The first large assignment consists of a Self-Management Plan. Using self-reflection activities provided in the newly developed employee handbook (See Appendix C), the students are provided with ways to set goals and further develop themselves as a teammate. The activities within the handbook reflect the Transformative Learning Theory outcome of being “...emotionally able to change” (Mazirow). It provides the student with *choice* and *critical reflection*. They can decide which activities to carry out and which ones are not applicable to them. The Self-Management Plan later develops into a Team Management Plan. This plan will aid in facilitating effective teamwork towards completing the semester-long client project.

To teach self and team management, the students are taught Scrum. Scrum is a form of management that “...helps people and teams deliver value incrementally in a collaborative manner” (Scrum.org). Throughout the beginning of the semester, students are learning about Scrum frameworks and preparing for a Scrum certification exam. Through working with Scrum.org, the students are able to take the PSM 1 exam (Scrum certification) at a reduced cost. Not only will the certification aid in their project

development, but it will fulfill their desire of developing hard skills. Both the TAs and the professor are also working to obtain their Disciplined Agile Scrum Master certifications so they can empathize with and support the students in their learning.

In the 2023 iteration of the course, students worked on projects for a hypothetical company. To support the new immersive learning simulation, actual clients with real projects are being provided for the students. This very tangible application provides the students with a high stakes project and a way to build their resumes/portfolios. The students are working on projects pertaining to the Experience Design and Management department at BYU as well as projects for Family Search (familysearch.org). Our job as experience designers is to “...design experiences that allow participants to feel positive emotion, become engaged, build relationships, find meaning, and develop competence” (Duerden and Rossman, 2019, pg. 21). The potential success of any designed experience becomes evident in the next stage of design - testing.

VI. TEST

How might we test the success of our prototype?

Following multiple iterations of the class prototype, it was decided to move forward with the aforementioned ideas and propositions. A prototype must follow stages of testing and feedback in order to improve and find potential faults. It is taught that “Designing experiences requires an intentional, tested process to create experiences that will lead participants through a sequence of interactions across all three experience phases, interactions that produce results desired by the participant and intended by the experience designer” (Duerden and Rossman, 2019, pg. 12). The three experiential phases previously mentioned are anticipation, participation, and reflection.

Throughout the testing phase of the current EXDM 415 prototype, the students are heavily involved in all parts of the anticipation, participation, and reflection phases. Their anticipation phase consists of their recruitment video, job description, and 30-, 60-, 90-day onboarding plans. Their participation is their actual involvement in the class and the carrying out of their onboarding plan as well as subsequent projects. To closely monitor the testing, several currently enrolled students participated in an early reflection phase facilitated by myself and other TAs. To expand insight, students from the 2023 class were also brought in for feedback on both the previous iteration of the course and the newly developed implementations – onboarding, employee handbook, etc.

To carry out this reflection phase, I carried out focus groups about two weeks into the redesign testing. There were two days of focus groups, each consisting of one W2024 group and one W2023 student group. Each group consisted of 6-8 students. The W2023

and W2024 groups remained separated from the other throughout the feedback process. Each participant volunteered and participated as they felt willing. The participants were not required to answer any of the questions, but most chose to comment on a majority of the talking points (Script outlined in Appendix D).

FOCUS GROUPS – W2023 STUDENTS

This cohort of students participated in the previous iteration, W2023, of EXDM 415. The focus group began with their initial thoughts on the class. A majority of the students had struggled to grasp onto concepts during the beginning of the course, but following adjustments made by Dr. Hodge, found the concepts to be applicable to their professional lives. Many shared sentiments of using agile methods and metrics during their required internships. According to the responses, the most impactful and memorable moments of the course were during immersive simulations. This allowed them to apply their newly learned skills in a “real life” situation.

After being introduced to the newly prototyped course materials (employee handbook, course outline, etc.) the students were impressed by the adjustments. Most felt that these implementations would have positively impacted their learning. Students expressed desires to retake the course using this new methodology. The potential Scrum certifications were a substantial talking point. The students would have appreciated being able to add this skill, as well as the client project, to their resumes. The employee handbook left many good impressions. Many expressed an appreciation for clearly outlined values and “job descriptions”.

Accompanying the almost exclusively positive feedback, the students offered constructive criticism. This included suggestions for the employee handbook including Scrum “toolboxes”, fewer introductory pages, and an outline of all course assignments. Some students still expressed the potential for course dislike amongst students not looking to enter the corporate world. Other students defended this thought by saying not every class will fit the goals and aspirations of every student (Sample comments in Appendix E).

FOCUS GROUPS – W2024 STUDENTS

This cohort of students is currently enrolled in EXDM 415. The focus group began with their initial thoughts on the class. The opinions that were shared covered a wide range of feelings. Some students love the immersive nature of the course while others feel overwhelmed by the set up. Being only two weeks into the semester, the students were still unsure of what to expect out of the class. Many are excited for the potential resume and skill building, while others are apprehensive for the semester to come.

Many of the students shared similar sentiments regarding the employee handbook. It was discussed that the handbook feels very ambiguous, and they aren't sure how it fits into the course. Many expressed that it should have been introduced sooner and with greater detail. A few students shared that the informative/introductory materials in the beginning have no use. Others wished that all of the course materials were available in the handbook rather than being spread across multiple mediums. There were multiple students that shared they hadn't used the handbook at all despite assignments that

required use of handbook materials. It was found that students who did use the handbook as outlined in the course felt it accomplished its need and aided in the completion and success of their assignments.

When asked about the effect that *buzz* had on their impressions of the course, many expressed their apprehension going into the class. Some of the students had heard rumors about a redesign taking place and were nervous not knowing what the course would entail. Following the first day of class/onboarding, many of their fears subsided. All of the focus group participants are intrigued by the materials being presented in the course and are hopeful for what the remainder of the course holds.

OBSERVATIONS

As designers of the course, we are consistently taking notes and discussing what we observe in this testing stage. From what we've witnessed and discussed in our weekly meetings, here are changes (among others) we hope to make in future iterations of the course:

- **Integration of all course materials to the employee handbook** – Many students have felt overwhelmed by the information shared online vs the handbook. There is a current lack of cohesion. Integrating the course materials will aid in bridging this gap.
- **Physical employee handbooks** – Students have expressed a desire to have physical copies of the handbook. This would allow them to easily refer to it during class. It would also enable individual customization post-course dependent

on what materials they feel are most applicable. They can hold onto information after the completion of the class that is most fitting to their profession.

- **30-day performance evaluations** – During this round of testing, we tried implementing 30-day performance evaluations with each student. The students expressed appreciation for the learning opportunity. Despite the positive feedback, it was particularly difficult to get these evaluations scheduled and finished before the deadline. This concept will be reapproached in an ideation session before the next iteration of the course.
- **Scrum “toolbox”** – With the introduction of a new management method, many students expressed feeling overwhelmed and confused. The Scrum method has a lot of “buzz” words and methods that are not used in day-to-day communications and practices. The inclusion of a toolbox in the handbook would allow for quick referral and refresh. As expressed earlier, this could be utilized in their future professional advances.

FUTURE IMPLICATIONS

Despite the ongoing testing, the immediate feedback and reflection from the EXDM 415 redesign has been positive. The implementation of Transformative Learning Theory and immersive principles has been beneficial to the betterment of students and their professional goals. Continuous development and ideation will continue to enhance the learning outcomes and improve the course materials.

Following the completion of this 2024 Winter semester, student course evaluations will once again be reviewed. Future ideation sessions will be held regarding

the feedback and needs of the students. Efforts will be made to bring on teaching assistants who took part in the current iteration of the course to gain more insightful feedback into course potential.

Focusing on Transformative Learning Theory and immersion has aided in the development of students both professionally and personally. Transformative Learning Theory has provided the students with a safe environment to explore their disorienting dilemmas and emotional changes. The implementation of this theory has aided in their success within teams and will continue to benefit them in their future endeavors. The immersive nature of the course has disclosed the essence of the corporate world and will assist in their future job pursuits and decision making. Our hope is that the students will be able to enter the workforce with real world experience and the ability to act as dynamic team members and individuals.

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APPENDIX A

First Handbook Iteration

Table of Contents

Our Roots – History of EXDM and the birth of Experience-centric Management

Get to Know your Management – QR codes to intro videos for Dr. Hodge and TA's

Mission, Vision, and Values – For BYU, Marriott School, and 415

Class Policies – How do we expect the classroom to run? What is our environmental goal(s)?

What we expect students to do/What they expect us to do

Civility policies

***Look at EXDM handbook in Box**

Purpose of the handbook – Personal and professional potential applications

Draft toolbox thoughts

Readings – HBR, etc.

Add to end

Mission: We design solutions and live according to human-centered principles

Vision: Transform business through human-centered design

Values: Failing forward, laughing through it, staying human-centered

This is what guides our behavior to each other and to our clients. These are principles that we live by.

Onboarding – Unit 1 (sketched out readings, section headers and dates w/ link to canvas or library)

JTBD: SM, better people, better teams (Evaluation module for each)

1. Be a better teammate – 4 days of class
 - a. Culture – company culture of Sonder/culture worksheet (you buy in to the values and then the way you interact with others reflects that... guiding behaviors)
 - b. Self management – Drucker
 - c. Self assessment (TBD, HBR?) – The Awesome Employee Playbook
 - d. Giving and receiving feedback (TBD)(The Ideal Team Player)
 - i. Deliverable: Personal Management Plan
2. Be better teams – 2 days of class
 - a. Five Dysfunctions of a Team
 - i. Boundaries and effective communication
 - b. Lead from the ranks?
 - c. Evaluation and metrics during scrum teaser
 - i. Deliverable: Team assignment – Connection experience, contract/plan moving forward
3. Agile/Scrum – 4-5 weeks
 - a. Basics

- b. Project Management – Microsoft Planner
 - c. Team evaluation and metrics
 - d. Performance reviews, progress reports/communicating to your stakeholder
- 4. Prep for scrum certification
- 5. Evaluation skills
 - a. Self evaluation, giving and receiving feedback, team evaluations
- 6. Project management
 - a. Planner software – LinkedIn Learning (review)
- 7. Culture/socialization – HBR worksheet?
 - a. Be better people and better teammates
 - i. Deliverable: Midterm/Practice test, Team document/procedures

Bio books/one pagers – Insert examples and importance

Culture – Worksheet on how to discover, create, and implement company culture

Learn your toolbelt: Planner, lucid, sprint board, excel, PowerPoint, etc. – Cheat sheets and tips/trick, Scrum.org (journeymap this) (Move to index/resource sheet)

Problem solving, failure (disorienting dilemma), structured thinking, effective communication, and boundaries

Conducting research, storytelling in business, performance reviews

Project management, working within a team?, agile

Failure and Disorienting dilemmas – 30 failures

Retention – Unit 3

Passion project ideas/hackathon - *Gamification (Final?)*

Offboarding – Unit 4

Learn your toolbelt: Bio books, One pagerPlanner, lucid, sprint board, excel,

PowerPoint, etc. – Cheat sheets and tips/trick, Scrum.org (journeymap this) (Move to index/resource sheet)

APPENDIX B

Second Handbook Iteration



EXDM 415

[Draw your reader in with an engaging abstract. It is typically a short summary of the document. When you're ready to add your content, just click here and start typing.]



[Document subtitle]

EXDM 415

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Grace Xiques (TA).....	4
Lauren Paulsen (TA)	4
Kendall Jones (TA).....	4

EXDM 415

Day 1 – Culture/Welcome to Sonder

- *Be a Better Leader, Have a Richer Life* by Steward D. Friedman
 - “Four-way wins” worksheet
 - Experimenting within the four domains of your life – work, home, community, and self
 - “Reflect on how important each is to you, how much time and energy you devote to each, and how satisfied you are in each. Are there discrepancies between what is important to you and how you spend your time and energy? What is your overall life satisfaction?”

Day 2 – Self-Management

- *Managing Oneself* by Peter F. Drucker
 - Feedback Analysis
 - “What are my strengths? How did I work? What are my values? Where do I belong? What can I contribute?”
 - “Every time you make a key decision, write down the outcome you expect. Several months later, compare the actual results with your expected results”
 - Christlike Attributes analysis in *Preach My Gospel*?

Day 3 – Self-Assessment

- *The Awesome Employee Playbook* by ...
- “Four-way wins” implementation week 1 reflection/follow-up

Day 4 – Giving and Receiving Feedback

- *The Ideal Team Player* by ...

Deliverable: Personal Management Plan

APPENDIX C

Final Student Handbook

SONDER
HUMAN-CENTERED BUSINESS SOLUTIONS

EMPLOYEE
HANDBOOK

THE PURPOSE OF THIS HANDBOOK

This handbook has been created to guide you through the onboarding process at Sonder (i.e., to help you navigate the EXDM 415 class). It is built following the 4 Cs of Onboarding framework and includes the following sections:

1. **Compliance:** Getting you the information you need about training and policies.
2. **Clarification:** Providing you with clear instructions and expectations for your new “job”.
3. **Culture:** Helping you develop a sense of the organizational and social norms of Sonder.
4. **Connection:** Creating high-quality, professional connections and networks.

It also provides a summary of Sonder’s 30 – 60 – 90 Day Onboarding Plan which includes objectives, deliverables, goals, priorities, and metrics of success for each stage. Finally, this handbook also provides you with almost daily professional development opportunities in the form of self- and team-assessments or exercises. These self- and team-assessments or exercises are essential to two of your major deliverables in the first 60 days: the (1) Self Management Plan and (2) Team Management Plan. So, be sure to complete the assigned tasks!

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COMPLIANCE: ONBOARDING CHECKLIST & IMPORTANT POLICIES

ONBOARDING CHECKLIST

SET UP ACCOUNTS & CREATE LOGINS

30 DAYS

- ☐ Attend first-week orientation
- ☐ Bookmark Canvas course in Web browser
- ☐ Update your Profile in Account Settings (picture + contact info)
- ☐ Update Notifications in Account Settings (enable email notifications, announcements)
- ☐ Outlook login (official BYU email required for class communication)
- ☐ Join Teams
- ☐ LinkedIn Learning setup (through EXDM 416)
- ☐ Microsoft Planner – Microsoft 365 (NetID + Password)

SET UP WORKSPACE

30 DAYS

- ☐ Watch Canvas tour video (Lesson 2 on Canvas)
- ☐ Review Sonder Handbook (pp. 1 – 12)
- ☐ Review CEO's (i.e., instructor's) office hours (days, times, locations)

NEW HIRE "PAPERWORK"

WEEK 1

- ☐ Complete [Career Readiness Self-Assessment](#)
- ☐ Complete [Total Leadership Four-Way Wins](#)
- ☐ Complete Syllabus Quiz (Canvas)
- ☐ Complete Professional "About Me" Presentation Slide (Canvas)

30 DAYS

- ☐ Complete all self-assessments in Sonder Handbook

CULTIVATE COMMUNITY

30 DAYS

- ☐ Schedule one-on-one meetings with leadership (Canvas)
 - ☐ Get to know your division lead (i.e., TA)
 - ☐ Get to know your CEO (i.e., instructor)
-

60 DAYS

- ☐ Schedule team meetings with leadership (Canvas)

IMPORTANT POLICIES

For a full list of policies, please read the Syllabus on Canvas.

STUDENTS' RECORDING OF WORK

No student may record any work activity without express written consent from the CEO. No student may share any video created for and/or by Sonder without express written consent from the CEO. If you have (or think you may have) a disability such that you need to record or tape classroom activities, you should contact the [University Accessibility Center \(UAC\)](#) to request an appropriate accommodation.

Qualifications:

- Enrolled in BYU EXDM (required)
- Completed EXDM 404, 405, 495 (required)
- Proficiency in design software such as Adobe Create Suite (preferred).
- Basic understanding of design principles (required).
- Excellent communication and collaboration skills.
- Portfolio showcasing a range of design projects and creativity.

EXPECTATIONS

WHAT WE EXPECT OF YOU

We expect you to come to “work” on time, ready to engage and actively co-create a high-quality, high-impact work experience. That means:

1. Completing all required preparatory “work” before “coming to work”. This work is found on Canvas and in this Handbook.
2. Review what we have covered in “onboarding”.
3. Anticipate and stay on top of what’s coming up in the schedule (especially due dates—check out the Canvas Calendar).
4. Jot down thoughts or questions you have as you prepare for “work” and bring them with you!
5. Get to work early.
6. Consider doing a quick mindfulness meditation to reset for your “workday”. Here are some ways to achieve that goal:

WHAT YOU CAN EXPECT OF LEADERSHIP

You can expect Sonder leadership facilitate an active, experiential, immersive, and high-quality “work experience”. That means we

1. Engage in extensive pre-class preparation, including slides, handouts, learning activities, and assignments.
2. Meet weekly to discuss needs.
3. Learn your names.
4. Use formative evaluations (including a mid-course evaluation) to get and act on your feedback.
5. We attend the temple.
6. We pray about and seek inspiration about the class.
7. We pray for you by name.

CULTURE: MISSION, VISION, AND VALUES

Sonder’s mission, vision, and values guide our behavior, how we interact with each other and with our clients. These are principles that we live by, and we expect Sonder employees to wholeheartedly embrace and practice them.

MISSION STATEMENT

We design solutions and live according to human-centered principles.

VISION STATEMENT

We aspire to transform business through human-centered design.

VALUES

FAILING FORWARD

Design thinking is all about failure—failure in a forward direction. Think about it: You iterate, you prototype, you test, something **fails**, and you reenter the design thinking cycle—you don’t give up! Your work wasn’t a failure! **You** weren’t a failure! In the design thinking process, we expect failure, we should celebrate it! You failed? Great! That means you learned a thing!

Unfortunately, a lot of what we experience in school and life conditions us to fear failure and to avoid it at all costs. In our organization, we don’t buy into this idea. Instead, we choose to embrace the reality that failure is unavoidable—and it’s not final. We use design thinking and a growth mindset as lenses to **see failure as opportunities to learn**. We serve our clients’ needs better and more successfully when we embrace failure. We “Fail, fail again, fail better”¹, and our clients are never disappointed.

LAUGHING THROUGH IT

“Nothing is so bad it’s not good for something”², even if that something is just a good laugh. Because we celebrate failure, we also wholeheartedly embrace humor as a way to get OK with failure. Actively using humor helps us cope when things don’t go the way we expect them to. People who have the habit of using humor are more positive in the face of stress and enjoy positive life experiences more³. Humor helps customers get rid of anger, facilitates service recovery, and reduces tension. As one person once said, “If you can laugh at yourself, you are

¹ Samuel Beckett.

² Danish expression.

³ Kobel & Groeppel-Klein, 2021; Martin et al., 1993; Wang et al., 2023.

going to be fine. If you allow others to laugh with you, you will be great”⁴. We invite you to laugh with us as we rapidly iterate human-centered design solutions.

STAYING HUMAN-CENTERED

The word “sonder” means “the profound feeling of realizing that everyone, including strangers passing in the street, has a life as complex as one's own, which they are constantly living”⁵. It's no accident that we named our company Sonder. Recognizing and honoring shared humanity is essential to the human-centered solutions we provide our clients—and it's essential to the success of our company. We deeply believe in a human-centered approach to designing intentional work experiences. Internally at Sonder, we

- Practice accountable autonomy,
- Build high-quality connections, and
- Prioritize wholistic well-being.

Our approach is based on the idea that humans, not employees, work at Sonder, and that work should be designed in a way to not only meet the needs of our clients but also to meet the needs of those at the heart of Sonder: its people. This approach is also grounded in the gospel principle that “When we love God with all our hearts, He turns our hearts to the well-being of others”⁶. This mindset is what makes us more productive, creative, and empathetic in the workplace and surrounding areas of our lives.

⁴ Martin Neimoller.

⁵ Wikitionary.

⁶ President Russell M. Nelson

COMMUNITY: PROFESSIONALISM & ORGANIZATION CHART

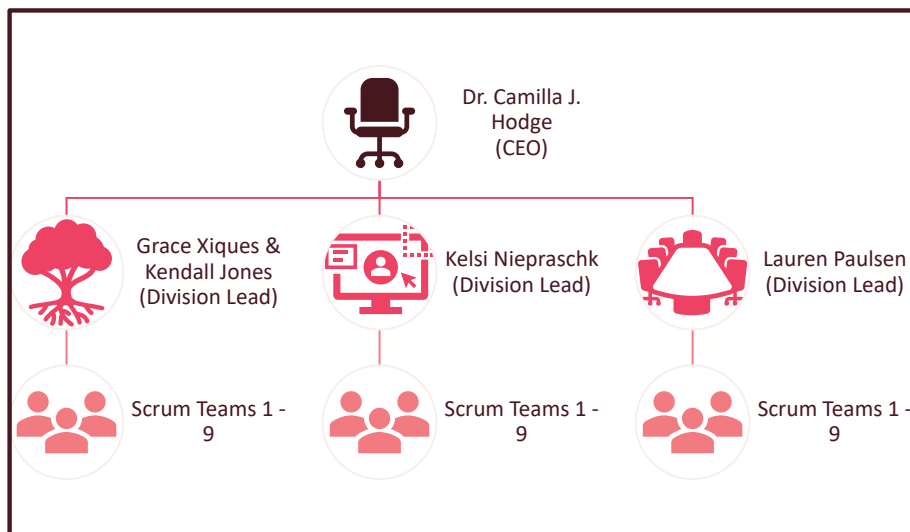
PROFESSIONALISM

Sonder seeks to build a community—a community of learning and a community of becoming. Members of this community include you, you “coworkers”, division leaders, the CEO, and any guests, including and especially our clients. We seek to uphold the highest standard of professionalism, courtesy, and respect in our in-person and online communication. Because you are new to Sonder, your onboarding period should be considered a laboratory in which you can practice and refine professionalism that will help you be successful. To that end, we depend on each other to learn, and to help us learn, we strive to do the following:

- **Maintain a professional demeanor** when interacting with other members of the Sonder community.
 - Think about your nonverbal communication. For example, your eye contact, does it show engagement? Do your facial expressions show respect and openness to others?
 - [Here are some tips on professionalism in the workplace.](#)
- **Be accountable.**
 - "It is not only what we do, but also what we do not do, for which we are accountable." - Molier
 - "Accountability is essential to personal growth, as well as team growth. How can you improve if you're never wrong? If you don't admit a mistake and take responsibility for it, you're bound to make the same one again." - Pat Summitt
 - [Accountability in the workplace is essential.](#)
- **Practice humility.**
 - "We can choose to humble ourselves by conquering enmity toward our brothers and sisters, esteeming them as ourselves, and lifting them as high or higher than we are. We can choose to humble ourselves by receiving counsel and chastisement. We can choose to humble ourselves by forgiving those who have offended us. We can choose to humble ourselves by rendering selfless service. We can choose to humble ourselves by going on missions and preaching the word that can humble others. We can choose to humble ourselves by getting to the temple more frequently. We can choose to humble ourselves by confessing and forsaking our sins and being born of God. We can choose to humble ourselves by loving God, submitting our will to His, and putting Him first in our lives. Let us choose to be humble. We can do it. I know we can." - President Ezra Taft Benson

- Humility has massive positive effects on business.
- **Remember the MSB vision and values.**
 - Vision: "We aspire to transform the world through Christlike leadership."
 - Values: "Faith in Christ", "Integrity in Action", "Respect for All", and "Excellence".

ORGANIZATIONAL CHART



30 – 60 – 90 DAY ONBOARDING PLAN		
<div>30 Days (February 8)</div> <ul style="list-style-type: none">• Focus: Learn the company's mission, vision, and values; increase self-awareness; and learn Scrum fundamentals.• Goals: Complete self-management plan and Scrum quiz 1, one-on-one with leadership.• Priorities: Self-guided Scrum Master learning path progress.• Metrics of success: 85% or higher on Scrum quiz 1; 80% or higher on self-management plan.	<div>60 Days (March 9)</div> <ul style="list-style-type: none">• Focus: Learn how to be an effective team member, team, and Christlike leader; implement aspects of scrum as a team.• Goals: Achieve passing score on a practice scrum master certification exam and complete team-management plan.• Priorities: Prepare for scrum master certification; start Client Project.• Metrics of Success: 80% or higher on scrum master certification practice exam.	<div>90 Days (April 8)</div> <ul style="list-style-type: none">• Focus: Completing Client Project per their needs and specifications; implementing professional communication.• Goals: Conduct sprints to needfind, outline, and problem solve; report effectively to client.• Priorities: Prepare for client deliverable and final presentation.• Metrics of Success: 80% or higher on Client Project deliverables.

ONBOARDING UNIT 1 (30 DAYS): BECOMING A BETTER TEAMMATE

PURPOSE:

The purpose of this unit is to build each employee's (i.e., student's) self-awareness, thereby building their capacity to be effective, high-functioning, and contributing team members. The purpose of this unit is also to familiarize employees (i.e., students) with the Agile and Scrum frameworks and foundations.

EMPLOYEE SKILLS & COMPETENCIES:

At the end of their first 30 days, Sonder employees (i.e., students) will be able to

1. Create and begin implementing a self-management plan based on
 - ☐ Self-evaluations (provided in the Handbook)
 - ☐ Complete readings and trainings (linked on Canvas)
2. Understand and begin applying Agile and Scrum concepts including:
 - ☐ Empiricism
 - ☐ Agile Manifesto, Values, and Principles
 - ☐ Scrum Values
 - ☐ Scrum Teams & Roles
 - ☐ Scrum Artifacts
 - ☐ Sprint Goal
 - ☐ Defining Done

UNIT 1 DELIVERABLES:

- ☐ "About Me" Slide
- ☐ Goal Setting
- ☐ Four-Way Wins
- ☐ Individual Meeting with Leadership
- ☐ Scrum Quiz 1, 2, & 3
- ☐ Self-Management Plan

ONBOARDING UNIT 1 OVERVIEW

Lesson ¹	Topic ²
1	Welcome to Sonder – Your First Day of Work
2	EXDM 415 Course Introduction
3	Failing Forward: Sonder's First Guiding Value
4	Self-Management & Self-Leadership
5	Self-Management & Self-Leadership
6	Receiving Feedback
7	Scrum
8	Client Project Kickoff

Note: Readings and assignments are listed on Canvas; please refer to Canvas for required readings, assignment descriptions, assignment due dates, etc.

1 Lesson = The day of class (e.g., first, second, third, etc.). Canvas Modules are built by lesson. and the

2 Topic = The general topic of the content being covered in the Lesson.

ONBOARDING DAY 1: WELCOME TO SONDER!

THE FIRST STEP TO BECOMING A BETTER TEAMMATE IS TO BUILD SELF-AWARENESS!

CAREER READINESS

SELF-AWARENESS ASSESSMENT

INSTRUCTIONS: Circle the rating that best describes you for each of the following statements:

	Strong <i>I am very confident</i>	Good <i>I have room to grow</i>	Weak <i>I really need to work on this</i>	Unsure <i>I just don't know</i>
<i>Inner work standards:</i> The ability to personally set and work to high performance standards.	1	0.5	0	0
<i>Initiative:</i> The ability to actively tackle problems and take advantage of opportunities.	1	0.5	0	0
<i>Cognitive intelligence:</i> The ability to think systematically and identify cause–effect patterns in data and events.	1	0.5	0	0
<i>Tolerance for uncertainty:</i> The ability to get work done even under ambiguous and uncertain conditions.	1	0.5	0	0
<i>Social objectivity:</i> The ability to act free of racial, ethnic, gender, and other prejudices or biases.	1	0.5	0	0
<i>Social intelligence:</i> The ability to understand another person's needs and feelings.	1	0.5	0	0
<i>Emotional intelligence:</i> The ability to exercise self-awareness and self-management of emotions.	1	0.5	0	0
<i>Stamina:</i> The ability to sustain long work hours.	1	0.5	0	0
<i>Resistance to stress:</i> The ability to get work done even under stressful conditions.		0.5	0	0
<i>Adaptability:</i> The ability to be flexible and adapt to changes.	1	0.5	0	0
<i>Self-confidence:</i> The ability to be consistently decisive and willing to take action.	1	0.5	0	0
<i>Self-objectivity:</i> The ability to evaluate personal strengths and weaknesses and motives and skills relative to a job.	1	0.5	0	0
<i>Impression management:</i> The ability to create and sustain a positive impression in the eyes of others.	1	0.5	0	0
<i>Introspection:</i> The ability to learn from experience, awareness, and self-study	1	0.5	0	0
Subtotal (Sum each column)				
TOTAL (SUM ALL COLUMNS)				

INTERPRETING YOUR SCORE:

This assessment is a good starting point for considering where and how you can further develop self-management skills. It offers a self-described profile of your personal self-management foundations—things that establish strong career readiness.

The higher you score the better. There shouldn't be too many perfect scores around.

Ask someone you know to also assess you on this instrument. You may be surprised at the differences between your score and the one they come up with.

ONBOARDING DAY 2: EXDM 415 COURSE INTRODUCTION

TOTAL LEADERSHIP: FOUR-WAY WINS

REFLECT, BRAINSTORM POSSIBILITIES, CHOOSE EXPERIMENTS, AND MEASURE PROGRESS

OVERVIEW

“Total Leadership helps you mitigate a range of problems that stem from making trade-offs among the different dimensions of your life:

- Feeling **unfulfilled** because you’re not doing what you love
- Feeling **inauthentic** because you’re not acting according to your values
- Feeling **disconnected** from people who matter to you
- Feeling **exhausted** by trying to keep up with it all

To tack such problems using Total Leadership, take these steps.

1. **Reflect**

For each of the four domains of your life – **work, home, community, and self**, reflect on how important each is to you, how much time and energy you devote to each, and how satisfied you are in each. Are there discrepancies between what is important to you and how you spend your time and energy? What is your overall life satisfaction?

2. **Brainstorm Possibilities**

Based on the insights you’ve achieved during your four-way reflection, brainstorm a long list of small experiments that may help you move closer to greater satisfaction in all four domains. These are new ways of doing things that would carry minimal risk and let you see results quickly. For example:

- Turning off cell phones during family dinners could help you sharpen your focus on the people who matter most to you.
- Exercising several times a week could give you more energy.

3. **Choose Experiments**

Narrow the list of experiments you’ve brainstormed to the three most promising. They should:

- Improve your satisfaction and performance in all dimensions of your life.
- Have effects viewed as positive by the people who matter to you in every dimension of your life.
- Be the most costly – in regret and missed opportunities – if you *don’t* do them.
- Position you to practice skills you most want to develop and do more of what you *want* to be doing.

4. **Measure Progress**

Develop a scorecard for each experiment you've chosen."⁷

INSTRUCTIONS

1. Read Friedman's thoughts on "Total Leadership".
2. [Open excel sheet](#). MAKE A DUPLICATE TO EDIT.
3. Reflect on the four domains of your life – work, home, community, and self. Consider where you would like to see improvement. Record in excel – **Sheet 1**
4. Brainstorm a list of 3 small experiments that affect all four domains. Record in excel – **Sheet 2**
5. Choose one experiment. How will it affect/improve the four domains? Record in excel – **Sheet 3 (Example given on this sheet)**
6. Determine how you will measure your success. What steps will you take to implement these changes and work towards your goals? Record in excel – **Sheet 3**
7. Submit excel sheet on canvas
8. Create your own worksheet to track the daily and weekly progress of your experiment. Be creative, consider what your most useful metrics will be. Include reflective journal entries (must have at least 3). Fill it out over the course of the next three weeks. This will be turned in at the completion of the three weeks.

⁷ *Be a Better Leader, Have a Richer Life*, Friedman

ONBOARDING DAY 3: FAILING FORWARD

MINDSET SELF-ASSESSMENT

IS YOUR MINDSET FIXED OR GROWTH-ORIENTED?

INSTRUCTIONS

1. Circle the number for each question which best describes you.
2. Total and record your score when you have completed each of the 10 questions.
3. Using the SCORE CHART below, record your mindset.

	Strongly agree	Agree	Disagree	Strongly disagree
Your intelligence is something very basic about you that you can't change very much	0	1	2	3
No matter how much intelligence you have, you can always change it quite a bit	3	2	1	0
Only a few people will be truly good at things like sports, you must be born with the ability	0	1	2	3
The harder you work at something, the better you will be	3	2	1	0
I often get angry when I get feedback about my performance	0	1	2	3
I appreciate when people, parents, coaches, or teachers give me feedback about my performance	3	2	1	0
Truly smart people do not need to try hard	0	1	2	3
You can always change how intelligent you are	3	2	1	0
You are a certain kind of person and there is not much that can be done to really change that	0	1	2	3
An important reason why I do my schoolwork is that I enjoy learning new things	3	2	1	0
TOTAL (sum all scores)				

SCORE CHART

22-30 = Strong Growth Mindset

17-21 = Growth with some Fixed ideas

11-16 = Fixed with some growth ideas

0-10 = Strong fixed mindset

MY SCORE:**MY MINDSET:**

ONBOARDING DAY 4: SELF-MANAGEMENT

MANAGING ONESELF

HOW WILL YOU MEASURE YOUR LIFE?

INSTRUCTIONS

1. Read each item below carefully.
2. Decide how true that statement is about you and choose the most appropriate response from the response key.
3. Write your response to each item in the box next to it.

Spiritual growth is a gradual process, and no one is perfect, so you should expect to rate yourself better on some items than on others.⁸

Response Key: 1 = Never 2 = Sometimes 3 = Often 4 = Almost Always 5 = Always

Christlike Attribute	Item/Statement	Response
Faith	1. I believe in Christ and accept Him as my Savior.	
	2. I feel confident that God loves me.	
	3. I trust the Savior enough to accept His will and do whatever He asks.	
	4. I firmly believe that through the Atonement of Jesus Christ I can be forgiven of all my sins.	
	5. I have enough faith in Christ to obtain answers to my prayers.	
	6. I think about the Savior during the day and remember what He has done for me.	
	7. I have the faith necessary to help make good things happen in my life or the lives of others.	
	8. I know by the power of the Holy Ghost that the Book of Mormon is true.	
	9. I have enough faith in Christ to accomplish anything He wants me to do – even miracles if necessary.	
Hope	10. One of my greatest desires is to inherit eternal life in the celestial kingdom of God.	
	11. I am confident that I will have a happy and successful life.	
	12. I feel peaceful and optimistic about the future.	

⁸ https://www.churchofjesuschrist.org/bc/content/shared/content/images/gospel-library/manual/36617/36617_000_006_06-attributeActivity.pdf

	13. I firmly believe that someday I will dwell with God and become like Him	
Charity and Love	14. I feel a sincere desire for the eternal welfare and happiness of other people.	
	15. When I pray, I ask for charity – the pure love of Christ.	
	16. I try to understand others' feelings and see their point of view.	
	17. I forgive others who have offended or wronged me.	
	18. I try to help others when they are struggling or discouraged.	
	19. When appropriate, I tell others that I love them and care about them.	
	20. I look for opportunities to serve other people.	
	21. I say positive things about others.	
	22. I am kind and patient with others, even when they are hard to get along with.	
	23. I find joy in others' achievements.	
Virtue	24. I am clean and pure in heart.	
	25. I have no desire to do evil but to do good.	
	26. I am dependable – I do what I say I will do.	
	27. I focus on righteous, uplifting thoughts and put unwholesome thoughts out of my mind.	
	28. I repent of my sins and strive to overcome my weaknesses.	
	29. I feel the influence of the Holy Ghost in my life.	
Knowledge	30. I feel confident in my understanding of gospel doctrines and principles.	
Patience	31. I study the scriptures daily.	
	32. I earnestly seek to understand the truth and find answers to my questions.	
	33. I receive knowledge and guidance through the spirit.	
	34. I love and cherish the doctrines and principles of the gospel.	
	35. I wait patiently for the blessings and promises of the Lord to be fulfilled.	
	36. I am able to wait for things without getting upset or frustrated.	
	37. I am patient and long-suffering with the challenges of this life.	
	38. I am patient with the faults and weaknesses of others.	
	39. I am patient with myself and rely on the Lord as I work to overcome my weaknesses.	
	40. I face adversity and afflictions calmly and hopefully.	

Humility	41. I am meek and lowly in heart.	
	42. I rely on the Lord for help.	
	43. I am sincerely grateful for the blessings I have received from the Lord.	
	44. My prayers are earnest and sincere.	
	45. I appreciate direction from my leaders or teachers.	
	46. I strive to be submissive to the Lord's will, whatever it may be.	
Diligence	47. I work effectively, even when I'm not under pressure or close supervision.	
	48. I focus my efforts on the most important things.	
	49. I have personal prayer at least twice a day.	
	50. I focus my thoughts on my covenants.	
	51. I set goals and plan regularly.	
	52. I work hard until the job is completed successfully.	
Obedience	53. I find joy and satisfaction in my work.	
	54. When I pray, I ask for strength to resist temptation and to do what is right.	
	55. I keep the required commandments to be worthy of a temple recommend.	
	56. I willingly obey the mission rules and follow the counsel of my leaders.	
	57. I strive to live in accordance with the laws and principles of the gospel.	

Self-Reflection:

- When was a time you felt you didn't receive feedback well? What were your emotional and outward reactions to that feedback?
- When was a time you felt you received feedback well? What were your emotional and outward reactions to that feedback?
- What was the difference between those two reactions?

ONBOARDING DAY 5: SELF-LEADERSHIP

Complete LinkedIn Learning [“Leading Yourself”](#); no additional assessment or exercise.

ONBOARDING DAY 6: GIVING & RECEIVING FEEDBACK

GIVING & RECEIVING FEEDBACK

INSTRUCTIONS

1. Read the following excerpts and watch the video. (Complete talk linked in footnotes. Optional)
 - a. “Divine discontent comes when we compare ‘what we *are* [to] what we have the power to *become*.’ Each of us, if we are honest, feels a gap between where and who we are, and where and who we want to become. We yearn for greater personal capacity. We have these feelings because we are daughters and sons of God, born with the Light of Christ yet living in a fallen world. These feelings are God given and create an urgency to act.”⁹
 - b. <https://www.churchofjesuschrist.org/media/video/2012-01-9320-decisions-of-the-first-presidency-and-the-twelve?lang=eng>
2. Total and record your score when you have completed each of the 20 questions.¹⁰
3. Using the SCORE CHART below, record your initial reactions to the score and next steps towards improving feedback.

	Often	Sometimes	Rarely
1. I pick an appropriate time and place to give feedback.			
2. I keep my emotions in check, remaining calm and keeping my voice even.			
3. I provide specific, detailed information about a person's behavior or performance.			
4. I explain the impact the actions are having on the team or organization.			
5. I really listen to the response of those receiving my feedback.			
6. I clarify my expectations if there is any confusion about the behavior of my in question.			
7. I remember to thank and encourage the receivers of my feedback.			
8. I provide input as needed in developing an action plan for meeting behavioral or performance goals.			
9. I try to understand feedback from the other person's point of view and preferred communication style.			
10. I truly listen to what feedback givers are saying.			

⁹ <https://www.churchofjesuschrist.org/study/general-conference/2018/10/divine-discontent?lang=eng#title1>

¹⁰ <https://www.cu.edu/doc/selfassessmentpdf>

11. I keep feedback in perspective and don't overreact.			
12. I try to learn from all feedback, even if it is poorly given.			
13. I am willing to admit to and learn from questions about my performance or behavior.			
14. Rather than avoiding feedback, I attempt to turn every feedback session into a useful encounter.			
15. I accept redirection and reinforcement rather than denying them.			
16. I accept responsibility for my role in achieving individual, team, and organizational goals.			
17. I accept responsibility for searching for solutions to performance and behavioral problems that threaten goals.			
18. I accept responsibility for keeping my emotions in check during feedback discussions.			
19. I am committed to listening and learning in all feedback situations.			
20. I listen to feedback with a heart of gratitude and a desire to learn and grow.			

Often: 3 points Sometimes: 2 points Rarely 1 point

SCORE CHART

52-60 points: Advanced

31-51 points: Proficient

20-30 points: Developing

Reactions and Next Steps:

ONBOARDING DAY 7: SCRUM

TOTAL LEADERSHIP: REFLECTION

HOW HAVE THE FOUR DOMAINS IMPROVED?

INSTRUCTIONS

1. After submitting your self-created Four-Way Wins worksheet and journal, take a few minutes to reflect on your progress.
2. Answer the following reflection questions:
 - a. What were your biggest struggles with conducting the experiment? Explain.
 - b. What was your highest point during the experiment? Explain.
 - c. Did you see changes in the four domains of your life? If so, which ones and in what ways?
 - d. If you were to do another Four-Way Win experiment, what would you do differently?
 - e. How will you maintain these changes moving forward?

ONBOARDING DAY 8: CLIENT PROJECT KICKOFF DAY

CLIENT MEETINGS: HOW TO

HAVE YOU PROPERLY PREPARED FOR YOUR CLIENT MEETING?

CHECKLIST¹¹

- ☐ Review client history and needs.
- ☐ Research the client.
- ☐ Prepare an agenda.
- ☐ Confirm the meeting time and location.
- ☐ Confirm attendees and roles of team members.
 - ☐ Note taker
 - ☐ Backup note taker
 - ☐ Questions lead
 - ☐ Technology controller
- ☐ Prepare all necessary documents.
- ☐ Prepare talking points and questions.
 - ☐ Review potential questions the client may ask.
- ☐ Identify potential roadblocks.
- ☐ Check your appearance.
- ☐ Practice your pitch.
- ☐ Consider cultural differences (communication style, business practices, dress standards, etc.).

¹¹ <https://www.checklistsformanagers.com/checklist/pre-meeting-checklist-for-client-meetings>

Focus Group Outline/Script

FOCUS GROUP GUIDE

HONORS PROJECT FOR KELSI NIEPRASCHK (2023 – 2024)

INTRODUCTION

“Hello everyone, my name Kelsi Niepraschk. I will conduct the discussion and [other facilitators’ names] will observe and take notes. We invited you all to discuss your thoughts on your experiences in EXDM 415 taught by Dr. Hodge, as well as new course materials and learning activities. Your participation is voluntary and you may withdraw at any time. Your standing in the EXDM department or at BYU will not be affected by your participation or non-participation. Before we begin, I will review the consent document, which you all received a copy of. You will be asked to sign the document if you decide to participate. [Review informed consent document; have participants sign; collect signed forms.]

GROUND RULES

Thank you for your willingness to participate. During the course of our focus group, I will ask you several open-ended questions. Your personal opinions and views are very important to us. There are no right or wrong answers. Please feel free to express yourself freely during the discussion.

This conversation will be recorded. This is only for the purpose of the research and only I and the [other facilitators’ names] will listen to the recording. No names or personal information other than what you’ve provided in the information sheet will be used in our report. Your names will be replaced with ID numbers, so even if you say another person’s name during the focus group, it will not be written down in the transcript or in our report.

For your reference, we’ve scheduled this discussion to last for about one hour. We ask you to please silence your mobile devices and be attentive during the discussion. Please be courteous and give everyone the chance to express their opinion during the conversation. [Other facilitators’ names] and I are here only to assist in the discussion.

QUESTIONS

1. To begin, we’d like to go around the table and have you introduce yourselves. Please tell us your first name, the year you took EXDM 415 [for previous students], your age, and your professional area of interest (or, in other words, what you think you’d like to go into/do professionally).

STUDENTS’ EXPERIENCES

We want to hear about your experiences in EXDM 415. To do that, we have several questions.

FOR PREVIOUS STUDENTS

2. What did you think about EXDM 415?
3. Think back over your experience in EXDM 415. What went particularly well? What problems or concerns did you have?
4. If you were to describe 415 to another student who hadn’t take the class yet, what would you say?
5. How and when do you use what you learned in EXDM 415? [Probe for stories/specific examples]

FOR CURRENT STUDENTS

6. What do you think about EXDM 415?
7. What did you already know about EXDM 415 before taking the class?
8. Think over your experience in EXDM 415 thus far. What is going particularly well? What problems or concerns do you have?

STUDENT HANDBOOK + IMMERSIVE SIMULATION

We want to learn more about your perspectives about and experiences with the delivery of EXDM 415.

FOR PREVIOUS STUDENTS

This year, EXDM 415 has been redesigned. The course now uses a semester-long design team simulation that follows the employee life cycle as the context for teaching and practicing self-management and team management. [Show employee life cycle; Figure 1]. We focus on Recruitment, Onboarding, and Development. [Show course map; Figure 2].

For the Recruitment stage, students this year watched a 3-minute 'recruitment' video at the end of EXDM 404 and receive an email from the "CEO" (the instructor of the course) of the "consultancy group" (the class) the students will be joining. For the Onboarding stage, we are pilot testing an "Employee Handbook" that focuses on (1) developing self- and team-management competencies using positive organizational psychology, (2) learning agile mindset and methods, and (3) learning Microsoft Planner (a project management software that uses Kanban). The students complete a mid-term exam that is a practice test for scrum master certification. For the Development stage, (1) students receive individual and team coaching and mentoring from the TAs and the instructor, (2) submit a Professional Development proposal, and (3) work in teams on a consulting project, completing 6 weeks of sprint simulations, and tracking their team progress using agile metrics.

[SHOW VIDEO AND EMAIL]

1. What is your first reaction to this new structure?
2. If this structure had been in place when you took the class, do you think your experience with EXDM 415 would have changed?
 - a. What would have changed? [PROBE FOR SPECIFIC STORIES/EXAMPLES]
 - b. Would this have changed the way you described the class to a student who hadn't taken it yet?
 - c. Would this have made it easier or harder to use what you learned in class in other places (like an internship, job, or other class project)?

We would like to review the Employee Handbook resource with you and seek your feedback. [SHOW HANDBOOK AND ALLOW PARTICIPANTS TIME TO REVIEW]

1. Now that you have looked at the Employee Handbook, what would you say are some of its strengths?
 - a. What is your favorite part of it and why?
2. If you could choose a part to eliminate, what would you choose and why?
3. If you could choose a part to develop further, what would you choose and why?
4. If you could add anything, what would you add and why?
5. Would this resource have changed your experience in EXDM 415? If so, how? [PROBE FOR STORIES/EXAMPLES]

FOR CURRENT STUDENTS

This year, EXDM 415 has been redesigned. The course now uses a semester-long design team simulation that follows the employee life cycle as the context for teaching and practicing self-management and team management. [Show employee life cycle; Figure 1]. We focus on Recruitment, Onboarding, and Development. [Show course map; Figure 2]. We have been using a new resource, an employee handbook, as part of this class structure. We are interested in learning about your experiences with this resource.

1. How often do you use the employee handbook? Please feel free to be honest, your answers here will not be used to assess any part of your participation or engagement in the class.
 - a. Which parts are you using?
 - b. Which parts are you *not* using?
 - c. What is the reason for using some but not other parts?
2. What would you say are some of the strengths of the employee handbook?
 - a. What is your favorite part of it and why?
3. If you could choose a part to eliminate, what would you choose and why?
4. If you could choose a part to develop further, what would you choose and why?
5. If you could add anything, what would you add and why?
6. Do you prefer this employee handbook over a textbook or reading packet? Why or why not?

FINAL SUGGESTIONS + CONCLUSION

1. If you were in charge of EXDM 415 and could make one change to make the experience better, what would you do?
2. Of all the things we discussed today, which do you feel were the most relevant to you?
3. Is there anything that you feel is important that we missed when talking about EXDM 415?

APPENDIX E

Sample comments from Focus Group – 2023 Students

Introductions

- **Areas of interest**
 - Events, events, patient experience, events, events, experiential marketing
- **What do you think about 415?**
 - Like Dr. Hodge and her flexibility/willingness to change. They got a good section
 - They were in one of the clashing sections, absent for the bad day. They loved the readings a lot but felt like They didn't get much out of the class. They ended up using the material in Their internship
 - First half of the class was confusing. What was the purpose? The name of the course isn't very clear. After doing application activities, They started to see the use of the material
 - Really liked when they learned specific tools like stand ups. They used that in their internship
 - They were in the clashing section. They wrote 10 pages, single spaced feedback on the course. To clarify, they love Dr. Hodge. They felt stress in the class because they knew it was important, but they felt it never got to the point
- **What went well? What went bad?**
 - They remember simulating scrum the most. This stuck the most to them. They don't remember much else except the whale case study

- After the first paper, they realized it was a lot more intense than they had thought. They felt the grading was harsh. There was no good example.
Would have like feedback instead of losing points
- They liked that the TA was always there. They had heard about the frankenstein method from seniors.
- Why can't we all do the essays together from the first place?
- They remember the grading being really bad. They were confused and upset on things that were not made clear to students. They remember the scrum day and the whale case study. They liked working in groups
- They felt they learned how to work with employees. They liked getting close to their team
- They like when teachers have assignments being worked on throughout the semester that will be turned in at the end. They felt there was a lot of busy work and not a lot of engagement/interaction. They felt it didn't fit EXDM. The class felt a bit smothering. They thought Dr. Hodge and the TA were a bit passive aggressive. Because they hadn't taken MCOM, they felt it was unfair to be held to those standards. She felt there were assumptions about people's experience in corporate businesses. Class structure was contradictory. Agile was taught but the class structure did not align with that. They were unsure how to connect concepts together.
- MCOM should be a prerequisite
- **How would you describe 415?**

- It is a class that focuses on more technical sides of business in a way that makes them human centric. It is a management class that also covers writing skills.
- It is not like the other exdm classes. It is a management class. It is a human centric, experiential management class with a lot of writing involved. It can be kind of rough
- **How and when do you use what you learned?**
 - Just started a job recently, and they wished they did stand up meetings. They are not using it currently but wishes they were
 - They implemented stand ups into their teams weekly meetings and it has been life changing. Keeps momentum moving
 - Supervisor struggles to be organized, and they are expected to be the organized one. They are trying to implement scrum even though it is proving a little tough with their management
 - If they are using things from the class, they don't remember that it came from class. It made them realize they don't want to work in corporate or be in management
 - After this class and their internship, they felt disheartened that they couldn't change anything if they wanted to
- **What is your reaction to the new structure?**
 - I wish I would have taken that!

- Sounds more applicable to life, and they love the certification option. It shows you the real world. There will always be people who don't like this class because management and corporate is not meant for everyone
- Sound like a good thing for people who want to do consulting
- It's going to help internalize the principles with hands-on experience.
- **If this structure had been in your semester, how would your experience be different?**
 - It would have been more experiential. They would still have a hard time connecting the dots to EXDM rather than just a regular business class.
 - It would have been very helpful for their internship
 - It gives you a taste of real world business and how it works. It would help you be more competent in those situations
 - They would have liked to work on a project that would matter to other people and be better for a resume/portfolio
 - Teachers don't understand how hard it is to find your own business to work on. Use your network! What network?
- **Open laptops to look at the handbook for a moment.**
- **What are some of the strengths?**
 - Maybe try putting a list of assignments in the handbook for students to check off
 - They love it! It is awesome! They like the “how will you measure your life reading”. They were disappointed when that reading was not used more in

class. They like how the readings are tied into class a bit more. They love the self assessments because it applies to life in general

- They also like the assessment, it reminds them of magazines
- They like how the handbook clarifies the point of the class. They like the job description to help them understand what their role in the class will be.
- They like the overall design and visuals. They like how some pages have limited text to help them not get overwhelmed. They love the meaning of sonder.
- They like the end section about how to do client meetings. What if the whole class were in one big packet? You could take that packet with you to your next internship and job
- **What would you want to include in the packet?**
 - The different tools students learn in class. One page summaries on the tools with the highlights.
 - It has a one page summary of all the principles you learn
 - Make it as simple as you possibly can. This will help you refer back to things quickly.
 - Students could decorate it to be their personal work binder. After each principle, ask how this can be applied to a student's chosen area of exdm. How can it apply to non corporate areas?
 - Make it possible for students to choose which pages of the packet they would want to keep based on what they liked most or remember most/least.

- Students can write directly in the packet and take pictures of work to turn in for assignments.
- Make it physical, because it is too much to put online.
- They like learningsuite better than canvas. If there were a physical packet, that would be a little bit easier to navigate than canvas
- Make online very bare bones to not confuse students. Also, they like that there are expectations and a culture statement. Sometimes you want to assume people know how to act, but they really don't
- Maybe there could be an HR solution for when students have complaints.
Where do you go / what do you do when you have a problem?
- How do we live in the business world as exdm people? We want to know how to operate in a business world / office setting
- The guest speakers last year were not quite hitting the mark
- They want guest speakers to talk less about their life stories and more about the details of their jobs and daily duties
- Have an entry level position come in as a guest speaker
- Maybe it would be helpful to have exdm alumni to come back and speak to help show how they transitioned into the business world
- **If you could remove any part of the handbook, what would it be? Or a part to develop further?**
 - The first ten pages seem like fluff. It takes a while to get to the point. Are the qualifications necessary?

- Dr. Hodge should teach how to use Microsoft Word to format documents.
They would go even if it were outside of class time
- They loved when Hodge was willing to change things completely last year. She is the definition of agile!
- They gained a big life lesson from how the feedback last year did not go well
- **Would this resource have changed your experience?**
 - It makes the class feel more cohesive. Last year felt choppy, but this gives a needed overview and adds some fun to things
 - They could not tell you what the first half of the class was about, but they remembered a lot more from the second half of the class. The handbook would have helped refresh their memory
 - If you do print the handbook, it would be good to include the readings.
- **If you were in charge of 415, what one change would you make?**
 - They were really excited for dean Madrion to come to class but afterwards was unsure what takeaways she was supposed to get. Was that in the DEI class?
 - Maybe to help harmony, they could give more opportunity to students to check in with one another. More bonding
 - They like the get to know you cards. They like interactive activities that may not be related to business at all, but it helps to break the ice. How can students bond with Hodge better? How can we see Hodge as a human?
 - It shouldn't take a giant blow up to cause change

